

Western Gateway Coach Strategy

Western Gateway Sub National Transport Body

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Quality information

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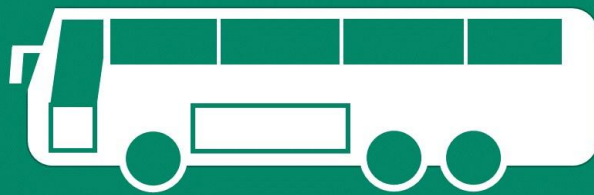
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Executive Summary

Introduction

The Western Gateway Sub-National Transport Body (STB) has produced a Coach Strategy covering a large area of south western England, spanning Gloucestershire in the north, Dorset in the south and key towns and cities including Bournemouth, Poole, Bristol, Bath, Salisbury and Cheltenham.

The overarching purpose of the Coach Strategy is to capture the current state of play for different types of coach services operating across the STB region and identify future priorities for improving coach services and supporting infrastructure.

The process of producing the Coach Strategy has involved gathering data on the regional and national coach sector. Knowledge of the sector is affected by a lack of consistent and detailed data, most certainly at a regional scale, so the development of the Coach Strategy has sought to obtain new data or make most effective use of existing datasets to help develop a clearer picture of coach services tailored to the Western Gateway STB region.

The development of the Coach Strategy has been set against a backdrop of the coach sector lacking significant attention at a national level and a clear vision and forward strategy for improvement, particularly when compared to other forms of public transport. This has been highlighted further by the increased attention that the bus sector has received in recent years through the publication of the government's National Bus Strategy (albeit this does cover some issues which relate to coach services).

Nevertheless, organisations including the Confederation for Passenger Transport (CPT-UK) are making efforts to raise the profile of the coach sector, highlighting the importance of coach services for connecting people and places, and their significant contribution to the UK economy. This Coach Strategy draws from evidence and documents produced by the CPT-UK.

The data gathered has been used to identify the key challenges facing the regional coach sector, and to inform the development of interventions which are designed to mitigate these challenges.

The overarching aims of the Coach Strategy are to:

- explore the current state of play of coach service provision and associated infrastructure;
- confirm the key challenges facing coach services in the area; and
- identify opportunities for improvements to coaches, within a framework of the Strategic Transport Plan's objectives and desired long-term outcomes.

The Coach Strategy is structured around the following topic areas:

- strategy development methodology, data availability and evidence base;
- Western Gateway geographical context including key settlements which coaches serve;
- the local, regional and national policy context related to coaches and the STB's Strategic Transport Plan;
- regional transport infrastructure including road links used by coach services;
- coaches (nationally and regionally) including the types of services, operators and relevant legislation;
- challenges facing the sector in the region (and nationally); and
- emerging opportunities and proposed interventions.

Coach Strategy methodology

The Coach Strategy has been developed by the Western Gateway STB in discussion with local authorities, the Department for Transport (DfT), National Highways, national and regional stakeholders such as the CPT-UK and Bus Users UK, as well as local coach operators.

The strategy has been developed over two main stages. Stage 1 has involved a process of collecting and analysing data and evidence from a range of sources; a policy review; meetings with stakeholders; and site visits to key locations across the regional network including coach interchanges.

Stage 2 has involved a process of gathering feedback on the Stage 1 outputs to refine a list of proposed interventions and actions that the Western Gateway STB Coach Strategy could champion. This list has been appraised against objectives and a prioritised list of interventions and actions produced, as well as some recommended next steps.

Geographical context

The Western Gateway STB area is a largely rural region with significant areas of low population density, however it does also feature some more densely populated urban areas and large conurbations with particular concentrations in the north/north-west and south of the region.

The largest urban area in the region is Bristol, with a total of 472,400 residents within the city itself. The Bournemouth-Poole-Christchurch conurbation is also significant with 400,300 residents. The rest of the Western Gateway area includes the cities of Gloucester, Cheltenham, Salisbury and Bath, the towns of Weymouth, Stroud, Tewksbury, Dorchester and Cirencester, and extensive countryside accommodating a host of smaller towns, villages and hamlets.

Existing travel movements by a variety of modes of transport are generated by the region's many and varied trip attractors, including nationally-significant tourist attractions such as Stonehenge and the Jurassic Coast, historic city centres including Bath, major retail centres including Cribbs Causeway, ports/airports, universities and employment hubs.

The STB area also acts as a conduit between the wider south-western region (Devon, Cornwall and the remainder of Somerset not within the Western Gateway STB area), South Wales and wider mainline UK including London to the east and Birmingham to the north.

The Western Gateway STB region is expected to accommodate a substantial level of housing and employment growth over the next decade and beyond, which will generate additional travel demand across the region, placing greater reliance upon transport links including roads and public transport services.

Not all trip movements are currently well served by public transport (several regional railway lines were closed in the 1960s leaving big gaps in the network) thus leading to increasing car reliance. Looking ahead, this points to an opportunity for more flexible and cost-effective improvements to public transport services including coaches.

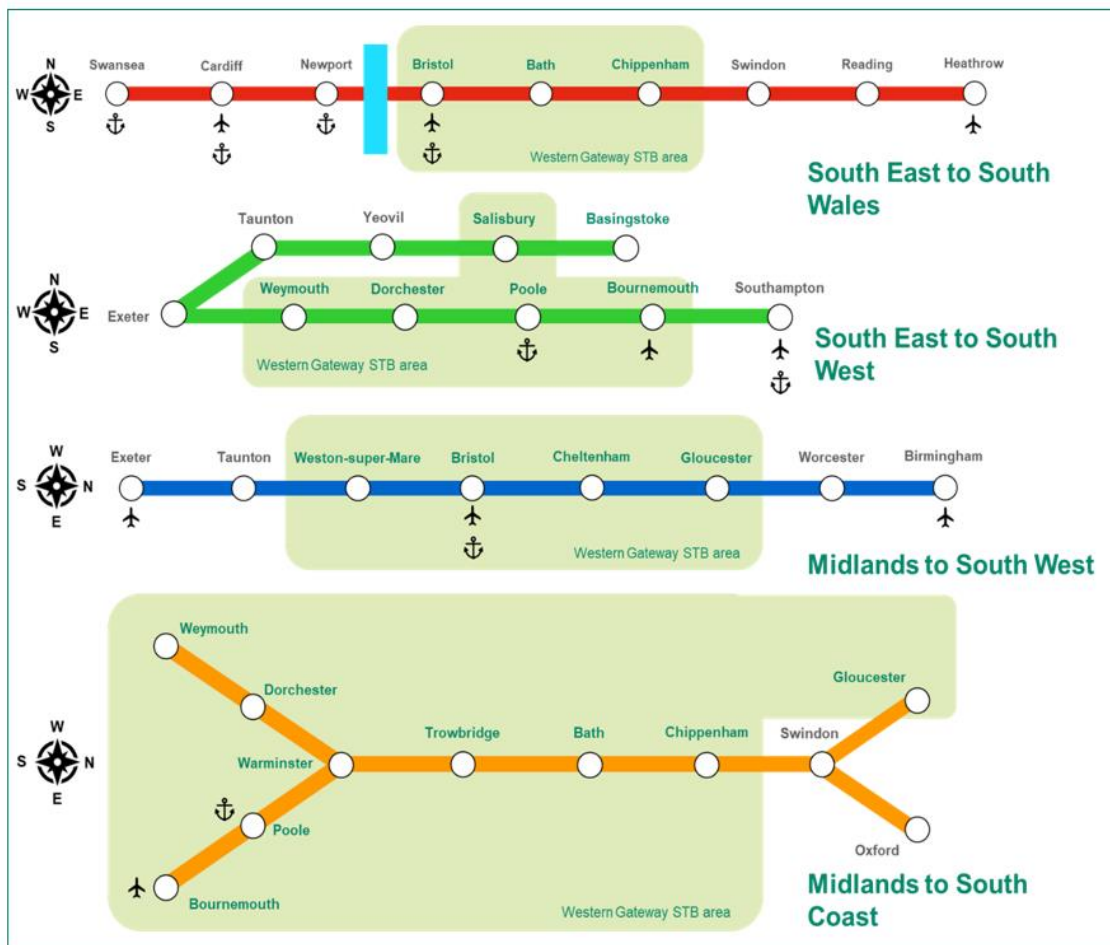
There is a clear need to support and, where necessary, enhance, a robust, integrated and multi-modal transport network that can manage increasing demand and achieve wider decarbonisation objectives. The coach sector should play an important role in this vital inter-urban and inter-regional transport network.

Policy context

The Coach Strategy sits within a framework of policies and strategies that span local, regional and national government levels. Of particular relevance is the Western Gateway STB Strategic Transport Plan which provides a series of long-term objectives (set out in the following table).

Objectives	Long-term outcomes	Long-term delivery priorities
Economic		
<ul style="list-style-type: none"> • Ensure effective access of labour markets • Improve North-South connectivity 	<ul style="list-style-type: none"> • Quality travel connections • Highly resilient strategic transport network 	<ul style="list-style-type: none"> • High quality strategic transport network • Improved inter and intraregional connectivity
Environmental		
<ul style="list-style-type: none"> • Decarbonisation of the strategic transport network • Adoption of electrification and/or use alternative fuels to enable fossil-fuel free transport 	<ul style="list-style-type: none"> • Integrated passenger transport network • Coherent network of electric vehicle and alternative fuel infrastructure 	<ul style="list-style-type: none"> • Carbon free strategic transport network • Increased strategic travel options
Social		
<ul style="list-style-type: none"> • Support multi-modal travel options within travel to work areas • Improve transport and digital connectivity to reduce poverty and deprivation 	<ul style="list-style-type: none"> • Improved access for employment, education and other essential services • Improved user experience of strategic transport networks • Increased collaboration & support for the delivery of innovative ideas 	<ul style="list-style-type: none"> • Safe strategic travel networks that fulfil customer expectations

The Strategic Transport Plan sets out four strategic multi-modal travel corridors identified which stretch across the STB area and into neighbouring regions. These are shown schematically in the next figure and are important in identifying the key strategic movements connecting different parts of the STB area, which are likely to be important corridors for coach services albeit with varying levels of services available currently.



There is also a much wider policy context that the Coach Strategy sits within, including:

- National transport policies such as the Transport Decarbonisation Plan;
- Local transport policies such as Local Transport Plans; and
- Local authority Clean Air Zones (CAZs) policies and proposals.

Regional transport infrastructure

Coach services typically travel long distances and make use of a network of A-roads, B-roads and Motorways crossing the Western Gateway STB area, including the M4, M5, A40 and A303, some of which provide connectivity across to other regions.

Generally speaking, north-south movements across the area are more poorly served by the existing road network, relying upon lower capacity but popular A-roads such as the A350. A separate study is being undertaken by National Highways into route connectivity between the M4 and Dorset Coast.

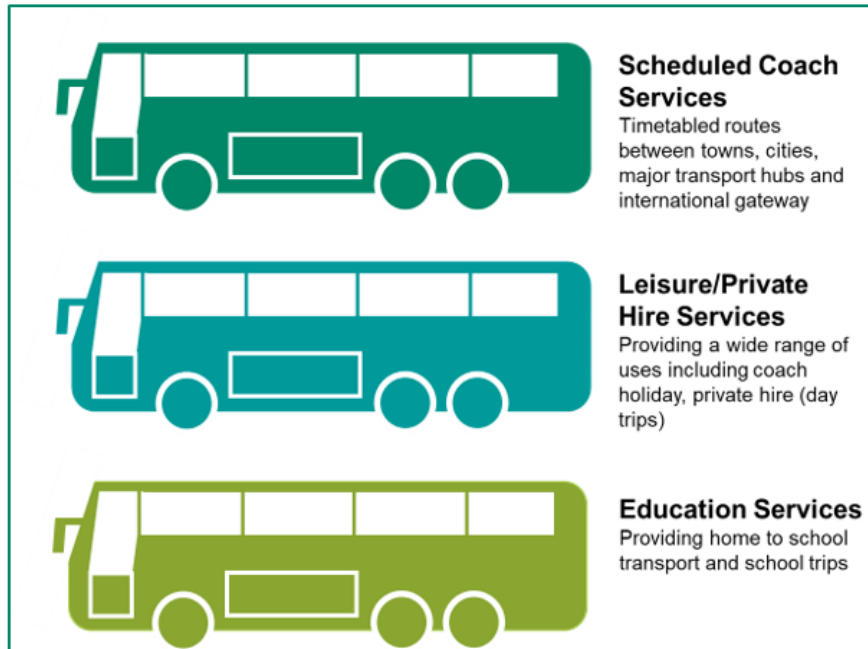
Also of note is that there are international gateways within the region: Bristol and Bournemouth Airports which coaches will provide connections to, as well as Poole and Bristol Ports.

The UK and Regional Coach Sector

Coaches can be broadly distinguished by the types of vehicles used and the types of services provided. Buses and coaches are vehicles that can carry 8 or more passengers

which therefore also encompass minibuses. Coaches and larger buses can also be distinguished.

For the purposes of the strategy, there are three main types of coach services – scheduled, education and leisure/tourism/private hire and many coach companies offer the whole range of these services although some only operate in one of these markets.



A significant proportion of **Scheduled Coach Services** within the region connect with major cities and hubs, notably London and Heathrow Airport, predominantly using the M4 corridor and to a lesser extent, parts of the A303 and A31 corridors which feed into the M3 and M27 respectively, outside of the Western Gateway STB area.

Another corridor with a significant concentration of routes is the north-east to south-west corridor which cuts through the western part of the study area, generally along the M5 corridor between Birmingham and the wider south western region.

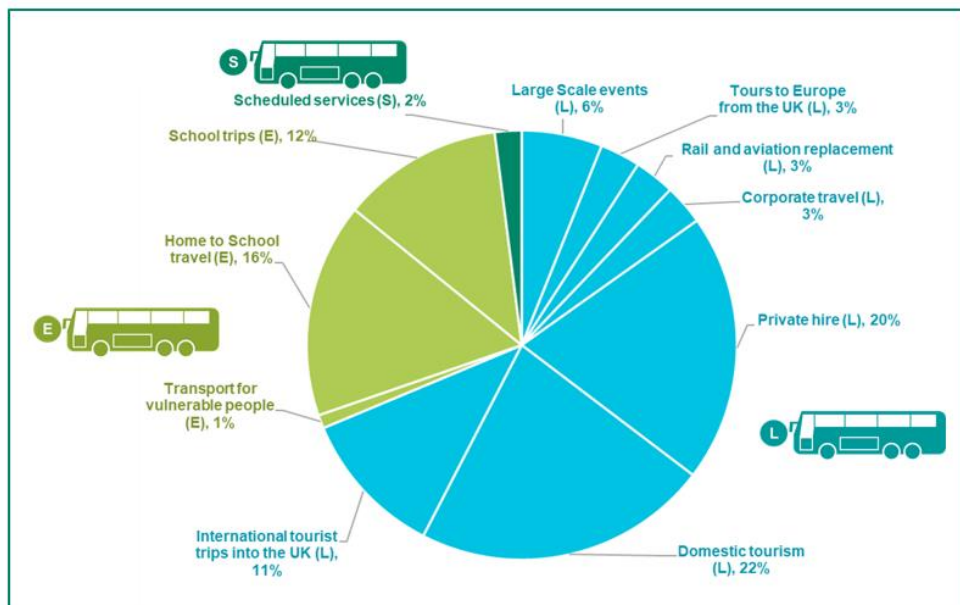
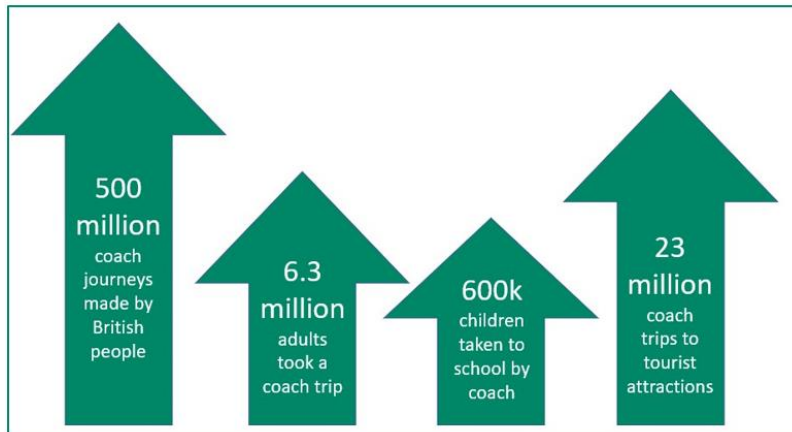
Coach services tend to funnel through and congregate in a few larger urban centres, with Bristol and Cheltenham being the most significant hubs within the Western Gateway STB area. There are fewer or no direct coach service connections linking between the southern and the northern-most parts of the STB area, or to some small-to-medium towns within Wiltshire and parts of Gloucestershire. Scheduled services are dominated by large operators including National Express, Megabus and Flixbus. Some services are operated by smaller, locally-based operators whose vehicles adopt the larger operator's branding and colour-schemes.

The **tourism/leisure/private hire sector** is important for most coach companies. It can be divided up into three sub-sectors: package holidays; excursions and private hire. Coaches can travel very long distances, and the prominence of the tourism sector within the STB area means that it attracts small and large coach-based tour operators from across the UK, visiting places like Bath, Salisbury, Stonehenge, the Cotswolds (including Bourton-on-the Water), Bournemouth, Weymouth and the Jurassic Coast.

Education services is one of the most important types of work for coach companies as it is regular work spread throughout the year except in school holidays, when most of the work stops. Typically, the coaches could be spare for 13 weeks of the year but operators

try to deploy the vehicles on private hire or summer holiday trips to gain extra revenue where possible. These types of coach services would operate over shorter distances, mostly likely within the STB area.

National statistics on passenger journeys are provided from a CPT report (2019):

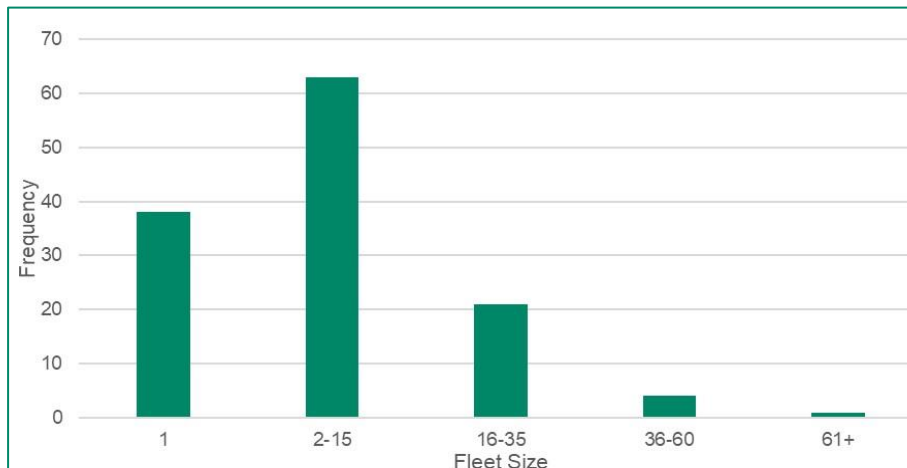


Percentage of Coach Fleet Revenue (CPT 2020)

As indicated in the pie chart above, CPT-UK provides statistics at a national level on the percentage of coach fleet revenue by coach service type/journey purpose. Equivalent data for the Western Gateway is not available, however it is unlikely to differ significantly from this national picture and given the significance of the tourism and leisure sector in the region, the Leisure/Private Hour category could represent an even larger proportion of revenue.

Data on the fleet size for coach operators in the Western Gateway STB region shows that most operators are small with a fleet size of between 1 and 15 coaches, which includes several operators with only one vehicle. The average fleet size in Western Gateway operators is 9 coaches. Meanwhile, there are only five operators operating over 36

vehicles with the largest being Go South Coast who have 101 coaches in their combined fleets.



Fleet size for coach operators in the Western Gateway STB region

The CPT estimates there to be around 2,500 operators of coaches in the UK, contributing around £6bn to the UK economy each year (CPT, 2020). Together these businesses provide 42,000 jobs across the country. Using a different source (Doug Jack coach), the number of operators in Western Gateway at the start of 2020 was 127.

These 127 different operators within the area collectively operate a total of around 1,182 vehicles, as shown in the table below. Gloucestershire has both the most coaches, with 379 as well as the greatest number of operators, with 40. It is worth noting that Poole has the largest number of coaches per operator, with 21, however the data is skewed a little because of Go South Coast being based there. The lowest average number of coaches per operator is Dorset with an average of 6 coaches per operator.

Operators and vehicles registered to addresses within the WG region

Area	Coaches	Operators	Ave no. of coaches/operator
North Somerset	84	8	11
Gloucestershire	379	40	9
Wiltshire	152	21	7
Bath and North East Somerset	55	7	8
South Gloucestershire	123	8	15
Dorset	120	19	6
City of Bristol	92	11	8
Poole	126	6	21
Bournemouth	51	7	7
Total	1,182	127	9

Source: Doug Jack database

What this means is that the coach sector is large and to some extent quite fragmented with a wide variety of services provided by a lot of different sizes of operators. Furthermore, given the nature of coach services and the distances they travel, the region will be visited by coaches from operators based in other parts of the country.

Challenges facing the sector

Many of the challenges facing the coach sector within the Western Gateway STB area are also experienced across the country. Regional coach sector challenges therefore need to be considered against a backdrop of broader themes or issues related to society, the economy and the environment. COVID-19, climate change and the current cost of living crisis are three examples of macro-scale issues influencing the coach sector nationally but also felt at a regional level. These themes and issues are either already having an impact today or could become more prominent and evolve in the future. Key considerations include:

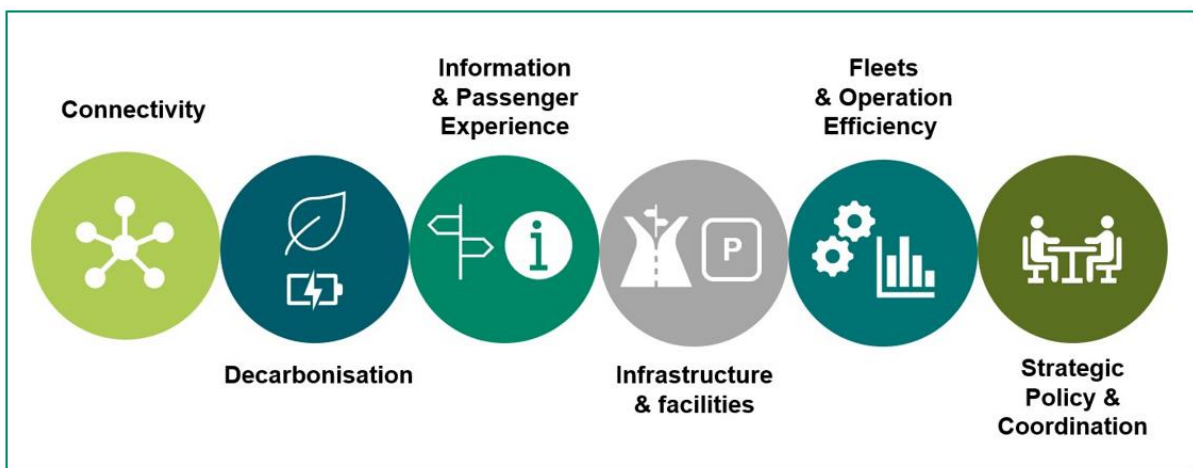
- **The restrictions put in place to limit the impacts of COVID-19 resulted in significant reductions in passenger transport demand, and while demand for coach services has recovered somewhat, the pandemic has established some potential longer-term trends in people's travel behaviour, in particular journeys to work.**
- **Linked to a dispersal of the population, all of the local planning authorities within the region are planning for where new homes and jobs will be located. Larger scale development is more likely to take place on greenfield sites on the edges of existing settlements, including smaller towns and villages, or on standalone sites which could be further away from amenities and existing passenger transport links.**
- **Rationalisation and centralisation of services (health, banking, retail etc) could mean that people will increasingly need to travel further to reach them, and for people without access to a car, they may need to use more than one passenger transport service to reach their destination. This strengthens the need for a better connected transport network comprising buses, coaches and trains in combination with safe and attractive pedestrian and cycle routes.**
- **Younger people are shifting away from obtaining a driving licence and vehicle ownership. They are likely to be more reliant on public transport than their parents, and therefore there may be opportunities to develop new types of public transport services. Ideally, such services would operate flexibly rather than focusing on traditional peak hours, in recognition that the 9-5 presenteeism culture is dwindling.**
- **The government has committed to banning the sale of new petrol and diesel cars and vans by 2030. In order to keep pace with consumer expectation, the coach sector will need to find ways to decarbonise along a similar timeline. Of course, significant barriers remain in the widespread adoption of electric coaches, including cost of vehicles, charging infrastructure and battery range. Investigations are also underway across Europe into hydrogen technology as an alternative long-term option for coaches.**
- **The cost of living crisis is affecting most households and industries, with widespread inflation of the costs of goods and services. The coach sector is suffering alongside others from the considerable increases in fuel and energy costs, although it continues to provide lower fares in comparison to similar journeys made by train.**

- The national and regional picture for coach operators is therefore unstable, as it is for many industries. Wider economic factors and trends (COVID, Brexit, the Ukraine war, energy costs etc), alongside an industry-wide difficulty with staffing and recruitment, have contributed to a tough climate for coach operators.

These challenges filter down to operators and contribute to a range of issues which are experienced today, including:

- operators experiencing difficulties in upgrading smaller, older fleets to vehicles compliant with air quality standards;
- connectivity gaps in the regional network leading to passenger loss, particularly along north-south corridors connecting Bournemouth-Poole-Christchurch with Bath, Bristol, Cheltenham and Gloucester;
- difficulties associated with ongoing post-COVID recovery;
- difficulty recruiting and retaining drivers;
- evolving government policies / standards that can be costly to adhere to;
- poor quality rest facilities for drivers and passengers;
- poorly developed cross boundary links into neighbouring areas;
- lack of career development for drivers; and
- difficult driver hours regulations and shift patterns.

The challenges facing the coach sector (and opportunities for change) are categorised into six strategic themes, as shown in the following figure.



- The **Connectivity** theme relates to service routes between places, including urban centres.
- The **Decarbonisation** theme relates to the emissions from coaches and adoption of new technologies to reduce carbon.
- The **Information & Passenger Experience** theme relates to how people use coach services, access information and purchase tickets.

- The **Infrastructure & Facilities** theme relates to the stops, interchanges and parking locations used by coach services.
- The **Fleets & Operation Efficiency** theme relates to how coach services are managed, maintained and kept profitable.
- Finally, the **Strategic Policy & Coordination** theme relates to the broader decision-making frameworks which could influence coach services operations nationally and regionally.

Emerging objectives, opportunities and interventions




The objectives of the Coach Strategy align with those set out in the Western Gateway STB's Strategic Transport Plan, creating shared goals that support the long-term development of the region. These have been identified in response to the challenges facing the sector and have been used to inform the strategy's proposed interventions:




- 1) **Improve urban and rural coach connectivity across the Western Gateway including potential new coach routes, increased service frequencies and better integration with other transport modes, to facilitate more sustainable travel and help achieve modal shift from private car.**
- 2) **Encourage consistent adoption of new technologies across the Western Gateway.**
- 3) **Develop easier and more seamless access to information about services, purchasing tickets and accessing coach services to make coaches a more attractive and inclusive mode of transport.**
- 4) **Improve coach stops, interchanges, drop-off and layover parking facilities, including better facilities for drivers, making them more attractive places to wait, rest and interchange.**
- 5) **Increase engagement and encourage more coordinated and transparent decision-making and action across the region to support the long-term resilience and vitality of the region's coach sector.**

The interventions proposed in the Coach Strategy have been devised in response to the challenges and supporting evidence base, with input from stakeholders. The types of interventions fall broadly into the following categories:

- **Services** – specifically changes to existing coach service routes or the creation of new services, notably scheduled services.
- **Infrastructure** – improvements to stops, interchange, drop-off and layover parking facilities, including those which primarily benefit passengers and those aimed at coach drivers, and used by scheduled, leisure/private hire and education coach services.
- **Initiatives** – other initiatives including further studies, forums for discussion and joint decision making, marketing and information on coach services including ticketing.

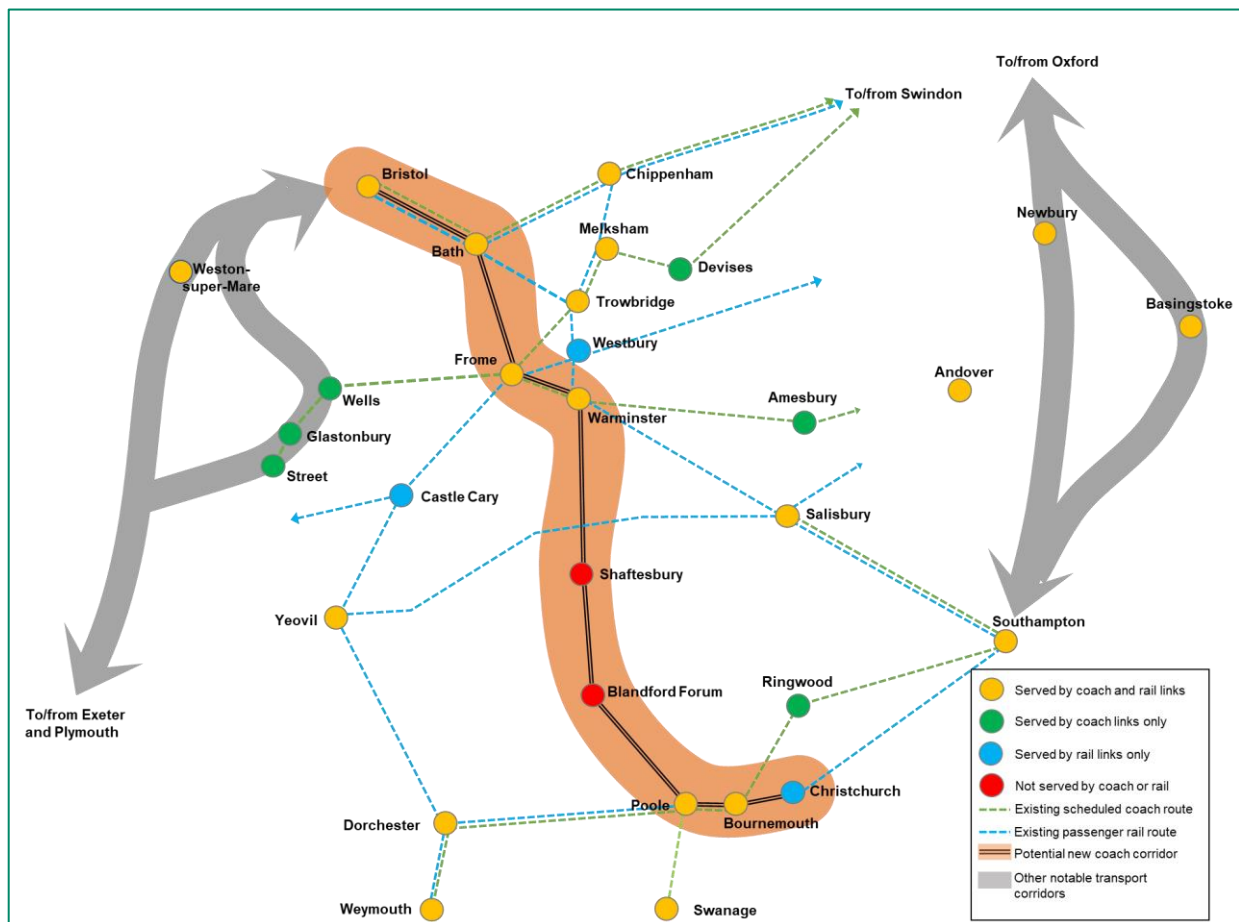
Proposed interventions identified in the Coach Strategy

Theme	Proposed intervention
Connectivity 	Explore collaboration between coach companies to service hard to reach areas.
	Work with operators to understand future opportunities for coach travel
	New scheduled coach service addressing strategic gaps: these being: <ul style="list-style-type: none"> ▪ (1) Bournemouth/Poole/Christchurch-Blandford Forum-Shaftesbury-Warminster-Frome-Bath-Bristol (approx. 68 miles) ▪ (2) Cheltenham-Gloucester-Stroud-Wotton under Edge-Thornbury-Bristol > Bristol Airport (approx. 50 miles) ▪ (3) Cheltenham-Cirencester-Tetbury/Malmesbury-Chippenham-Melksham-Trowbridge > towards Bournemouth/Poole/Christchurch (approx. 95 miles)
	New calling points/interchanges on existing or new routes, such as strategic locations including Cribbs Causeway, additional rural calling points (rural mobility hubs) and parkway interchanges near motorway interchanges on the edges of urban areas.
Decarbonisation 	Baselining carbon impact & setting a Carbon Management Plan for the sector / region
	Assist with identification of opportunities for funding for EV trials/hires.
	Assist with identification of opportunities for funding to support upgrades to cleaner vehicles.
	Support / facilitate development of a network of alternative fuel charging / stations.
	Decarbonisation marketing campaign promoting zero-emission alternatives to the industry.
	Review suitability of technologies from trials and their potential for the South West on an ongoing basis.
Information & passenger experience 	Improve ticketing experience by providing online/app-based payment options
	Live service information (online/app-based) and improve at-stop service information alongside
	Improve branding of services at stops/drop-offs, and wayfinding for travel connections and onward journeys
Infrastructure & facilities	Promote resources and training to help operators avoid bridge strikes.
	Improve experience at off-street & on-street stops and drop off points by providing weather shelter

Theme	Proposed intervention
	Improve safety and security at off-street & on-street stops and drop off by investing in lighting, CCTV and 'help points'
	Support for infrastructure improvements and investment where suitable
	Review of current coach parking facilities in the South West
	Support improvements to strategically important roads that require better journey time reliability.
Fleets & operations 	Review of current driver training and explore options for improvement
	Assist with targeted recruitment campaigns for the coach industry.
	Promote solutions to driver shortages.
	Promoting suitable alternative routes in the event of adverse weather.
Strategic policy & coordination 	Improve data collection so that problems with services can be more easily identified and evidence for opportunities to improve is readily available
	Assist operators with PSVAR legislation
	Assist operators with BODS legislation
	Support/deliver a passenger awareness campaign for coach services incl. opportunities for different user groups.
	Establish and promote a South West Coach Sector Steering Group.
	Partnership working with stakeholders to promote South West priorities.

It is considered that interventions related to the Strategic Policy and Coordination theme should be prioritised as these will seek to clarify and establish the priorities for investment and improvements, governance structures and the funding landscape, all of which need to be coordinated by the public sector in discussion with the coach sector and other key stakeholders.

An overarching aim of the Coach Strategy is to improve inter-regional and intra-regional bus and coach connections in response to strategic gaps identified, particularly by identifying potential services to address current connectivity gaps, especially to underserved areas which currently lack access to public transport. As outlined above under the Connectivity theme, three potential new service routes have been identified.



New scheduled coach service addressing a strategic gap (1)

As shown above, a new coach service route linking the Bournemouth/ Poole/ Christchurch conurbation with Bath and Bristol would fill a strategic gap in current public transport provision. The alternative rail routes are in-direct and would require routing either to the west via Dorchester and Yeovil, or to the east via Southampton and Salisbury.

Bristol/Bath to Bournemouth is the missing link and mirrors the old Somerset & Dorset Railway which was closed in 1966. The A350 corridor in general is poorly served by public transport. Routing via the A36, A350 and A354 for much of the way would keep the coach on main roads, albeit mostly single carriageway and not particularly fast. The journey time from Shaftesbury to Bath direct is just over the hour without stops therefore minimising the deviation of coach services to link with some minor towns. By serving Frome and Warminster it would only add 20 minutes to the overall journey.

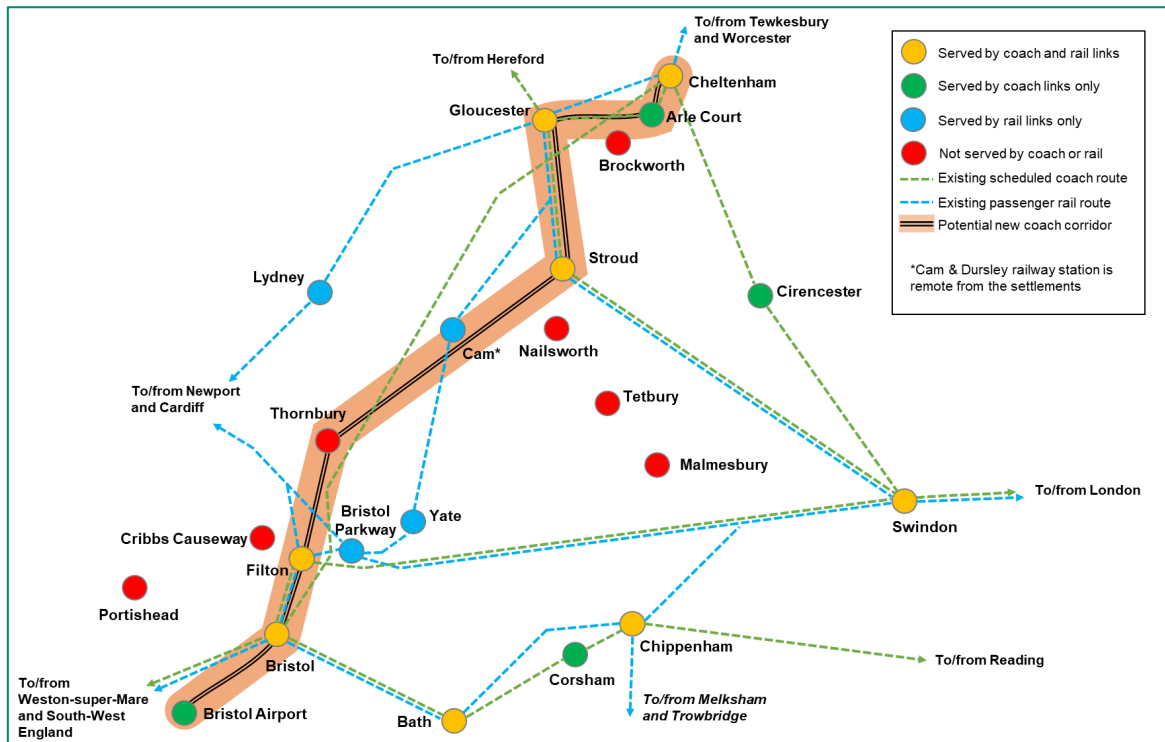
It should be caveated that many settlement pairs along this corridor do not generate very high levels of car demand, suggesting there would not be a strong case for a higher-frequency service, however there is potential for modal shift and reduce congestion (probably to a very small extent) at pinch-points along the A350, A354 and A36.

By serving settlements with a high concentration of university students (Bournemouth, Bath and Bristol), this could generate demand for new coach services, and especially given there is not a direct rail alternative.

The service corridor would provide an inter-urban public transport link in the small settlements of Shaftesbury and Blandford Forum which are currently not served by coach or rail. These settlements could act as rural mobility hubs for the surrounding area, with local

bus services, demand responsive transit and active travel networks providing the feeder links into the coach service. Given these small settlements are bypassed (Blandford Forum) or traversed (Shaftesbury) by the A354/A350, there would not be significant diversions or delays therefore maintaining reasonable journey times for coach services.

Alternatively, a smaller diversion into the Tesco Supermarket at Blandford Forum (which has an existing turnaround and bus stop) as an edge-of-town interchange hub could also help to minimise additional journey time that would otherwise be incurred if services were instead routed through the town centre, although it would make services more difficult to access from all parts of the town.



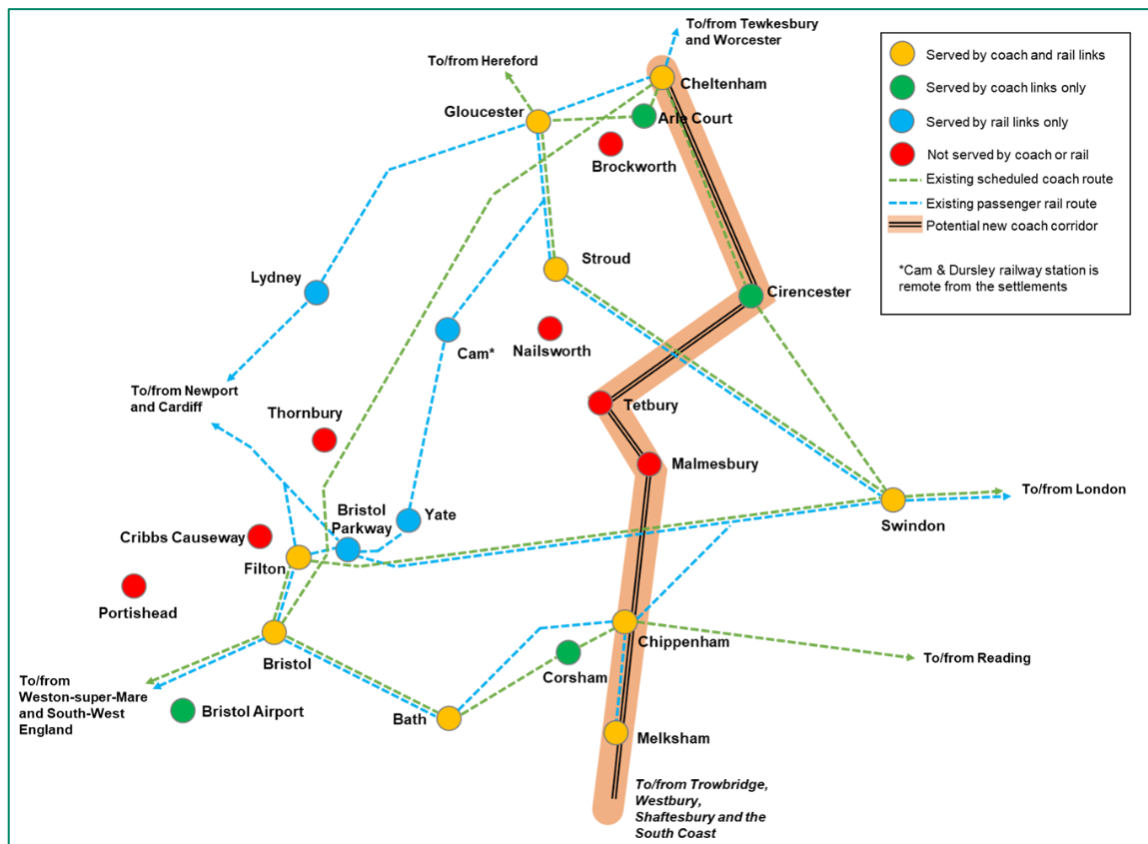
New scheduled coach service addressing a strategic gap (2)

A second potential coach service route option would be between Cheltenham/Gloucester and Bristol but in particular serving intermediate journeys that are poorly served by direct public transport links, these being Stroud-Bristol (moderate-high levels of car demand), Thornbury-Gloucester (moderate-high levels of car demand), Stroud-Thornbury (moderate levels of car demand) and Wotton-under-Edge -Bristol (high levels of car demand).

It is noted that a new railway station is proposed at Charfield near Wotton-under-Edge and that this may negate the need for a new coach service through this area. Alternatively, the service could utilise a section of the M5 and A38 between Stroud and Thornbury, potentially making additional calling stops at smaller communities such as Stone and Falfeld.

There could also be opportunity for services to link into important concentrations of employment across the north of Bristol, either by routeing via the University of the West of England Frenchay Campus (which has a bus/coach interchange) and/or via other centres, potentially establishing a new coach stop at Cribbs Causeway (utilising the existing bus interchange) or routeing via Bristol Parkway station which is 1.5km north of the UWE campus.

Although it has not been possible to determine this from the data analysis undertaken, there may also be potential to extend service on to Bristol Airport, which has poor public transport connectivity to settlements north of Bristol.



New scheduled coach service addressing a strategic gap (3)

A strategic gap has been identified between Cheltenham and Bournemouth, with the northern section shown above. Some sections are served by rail and by coach (including Cheltenham-Cirencester). Smaller settlements that are currently poorly served by public transport like Malmesbury could act as rural mobility hubs to enable people to access coach services using local transport links and active travel routes. An alternative to the route shown would be to route services via Bath, therefore capturing another major attractor location and potentially increasing passenger demand.

As with strategic gap 1, it should be caveated that many settlement pairs along this corridor do not generate very high levels of car demand, suggesting there would not be a strong case for a higher-frequency service, however there is potential for modal shift.

The three suggested service routes, as well as potential additional calling points on existing services, would address key connectivity gaps across the STB area. However, it is recommended that more detailed investigations are undertaken to determine the type of coach service needed, who they would be marketed towards and ultimately, in discussion with potential operators of these services, whether there is a sufficient market to sustain these services.

Services could be geared towards commuters and business travellers (potentially strategic gap 2), or to students and leisure travellers, or a mixture (strategic gaps 1 and 3). This could influence the business model, the calling points, frequency of service, type/specification of vehicle, branding/marketing strategy and fares.

Also, as with all coach services, it will be important for any improvements to coach service routes to be fully integrated with other transport services and links, so there will need to be a focus on how to achieve better integration across the STB area (including physical infrastructure such as stops/interchanges as well as ticketing) and in a variety of settings, whether these are in city centres, at major employment, retail or international gateway hubs, or in more rural settings which could present significant challenges especially in the more remote areas of the Western Gateway.

Next Steps

In conjunction with the series of interventions outlined above, the Coach Strategy puts forward some recommended next steps:

Passenger experience survey

Whilst some information has been gathered on the most common users of coach services, it would be beneficial to conduct a passenger experience survey for coach users. This would present important data on user demographics and journeys. In turn, the data could guide future interventions, monitor progress and influence future decision making.

Further engagement with operators

As part of the development of the Coach Strategy, local coach operators have been contacted to gain insights as to the challenges and opportunities across the Western Gateway STB area. However, it is recommended that conducting further engagement with coach operators will guide future interventions, particularly those around career development and recruitment. Regular engagement with operators would also be beneficial to gather feedback on current issues and in ensuring an open dialogue with wider stakeholders.

Lack of data on coaches

There has been a significant effort to gather data on coach services in the STB area and this has established a robust platform upon which to make initial consideration of what the challenges and interventions need to be, as outlined in this Coach Strategy. It is recommended that further research and data gathering is undertaken into the number, type and age of coaches operating in the South West. This could involve analysis of the Traffic commissioner data (recommended by the CPT-UK). It may also be useful to extend the Coach Strategy to cover the neighbouring Peninsula Transport area as those coaches need to travel through the Western Gateway area to reach many destinations.

Investigation into coach parking across the South West

A recent national survey into lorry parking has been completed for the DfT showing there is a national shortage of spaces. It would be useful to complement this with a similar exercise to establish the number of coach spaces available at MSAs and other facilities. The data gathered for the Coach Strategy has established where the main parking sites are located but a more comprehensive survey and audit would be required, including of the facilities available - the Coach Strategy has provided a snapshot based on a selection of case study sites and this has indicated that there is significant variation in provision. There may be scope for recommending flexibility in allocation of spaces depending on time of day and day of week.

The North – South road network other than the M5 is poor

Consideration will be needed of the implications of the M4 to South Coast report that is due to be published in 2023 and see if there are suggested infrastructure improvement that could

help facilitate shorter journey times on these core routes, both scheduled and charters. The Coach Strategy has identified weaknesses in the public transport network for north-south journeys along what the STB has defined as the Midlands to South Coast Multi-Modal Corridor, and has put forward two potential new coach routes which will require further investigations.



Introduction

1. Introduction

This document presents the Coach Strategy for the Western Gateway Sub-National Transport Body area.

Sub-National Transport Bodies (STBs) were devolved following an amendment in the Local Transport Act 2008 by the Cities and Local Government Devolution Act 2016 and enable for larger strategic planning and decision making of transport across England.

The Western Gateway STB comprises eight local authorities and one Combined Authority:

- Bath and North East Somerset Council;
- Bournemouth, Christchurch and Poole Council;
- Bristol City Council;
- Dorset Council;
- Gloucestershire County Council;
- North Somerset Council;
- South Gloucestershire Council;
- Wiltshire Council; and
- West of England Combined Authority (comprising Bristol City Council, Bath and North East Somerset Council and South Gloucestershire Council).

Members of the Western Gateway STB are committed to working together and providing a single voice to Government on strategic transport investment and prioritisation. This makes working with the Department for Transport (DfT), National Highways and Network Rail much more streamlined, results in more coordinated conversations and removes the risk of competing local priorities.

In addition to the elected members which represent the constituent local authority members, the Western Gateway STB board also includes members from the DfT, National Highways, Network Rail, neighbouring Peninsula Transport STB and representation from the Western Gateway Transport and Business Forum.

The Western Gateway STB's Strategic Transport Plan 2020-2025 identifies short-term strategic transport priorities, while providing the foundation for the development of a long-term plan that will consider multi-modal transport connections in the context of travel corridors rather than in local authority administrative boundaries

The plan sets out a series of strategic transport challenges:

- The need to decarbonise the transport network;
- Improving connectivity;
- Rural accessibility; and
- Productivity gap.

The plan also sets out a series of long-term objectives across three themes - Economic, Environmental and Social - including 'Improve North-South connectivity', 'Decarbonisation of the strategic transport network' and 'Support multi-modal options within travel to work areas'. The Western Gateway STB does not hold the relevant powers to deliver the services or schemes. It is therefore essential for the STB to engage and work with those stakeholders that can implement the priorities outlined within its Strategic Transport Plan.

A new long-term Strategic Transport Plan is expected to be published in 2023 and will cover the period up to 2050. This will complement Local Transport Plans and be structured around four priority multi-modal corridors: South East to South Wales; South East to South West; Midlands to the South West; and Midlands to the South Coast. These are discussed further later in this report.

The Western Gateway STB area is home to over three million residents, supports over 1.6 million jobs and covers some of the country's most prosperous, fast-growing conurbations. Key larger settlements include Bristol, Bath, Bournemouth, Cheltenham and Gloucester.

A function of transport is to support clean and sustainable economic growth by enabling key employment sectors to thrive. The Western Gateway STB seeks to improve strategic connectivity, to close productivity gaps and support sustainable growth.

The rate of population growth forecast is higher within the Western Gateway area when compared to England as a whole with an extra 448,000 people expected by 2041. The Western Gateway STB seeks to improve strategic connectivity to reduce dependency upon the car and to create a more sustainable and low carbon transport network.

The need for a Western Gateway STB Coach Strategy

The Western Gateway STB is aware of both the short-and long-term issues facing bus and coach travel across the region, including the impact of the COVID-19 pandemic on the stability of the bus and coach sectors and the shifts in patterns of passenger demand which could affect the ability to sustain pre-existing service provision.

One of the biggest weaknesses of existing bus and coach networks in many parts of the STB area arises from their historic development within county and municipal boundaries, whereas cross-boundary links have been very weakly developed.

The Strategic Transport Plan recognises the need to create a coherent overarching narrative for larger-scale investments in passenger transport connectivity which supports longer distance bus and coach services which link with flexible local feeder services.

The plan also recognises that there are significant potential benefits for electrification or the use of alternative fuels for buses and coaches which would support the decarbonisation of the transport sector.

Significant attention has been given to the bus sector since the publication of the Government's Bus Back Better National Bus Strategy for England in 2021. Subsequently local authorities have been required to produce Bus Service Improvement Plans and the DfT has awarded funding to some local authorities to deliver improvements to bus services and infrastructure.

Whilst the proposals and priorities put forward in BSIPs may to an extent have an influence on coach services, in contrast, far less attention has been given at a national level to the coach sector with limited references within the National Bus Strategy and no equivalent document having been produced by the DfT.

As will be discussed later in this report, there are many ways to describe coach services. With regard to vehicles, a coach is a large motor vehicle used for carrying passengers but often having a separate luggage hold and passenger facilities such as more comfortable seating, often high backed with headrests and toilets. With regard to the type of services they provide, coaches are more likely to travel longer distances compared to buses, and use higher speed roads such as motorways. In this context, the Western Gateway STB area needs to be considered as a destination for different types of coach services operating from within or from other parts of the UK (and overseas) and as a conduit for coaches to travel through towards other parts of England and South Wales.



Figure 1 - A line of coaches and two buses at the Poole Coach Park (also known as Seldown Coach Park)

The Confederation of Passenger Transport has published its own coach strategy for Britain¹ which emphasises the vital role that coaches play in the country's transport system. As will be explored in this Coach Strategy in the context of the Western Gateway, the CPT's strategy highlights that coaches transport significant numbers of passengers, for example prior to the COVID-19 pandemic, there were an estimated 500 million passenger journeys made by coach in the UK each year.

Coaches also transport around 600,000 children to school each day. Coaches therefore provide a convenient and accessible form of transport in helping people access holidays, education and combatting social exclusion, as well as support the UK's tourism industry; provide rail replacement services during engineering works; facilitate access to airports and major transport hubs; support vulnerable groups such as elderly, children and people with disabilities in accessing vital services; and serve major sporting, music and entertainment events.

¹ Backing Britain's Coaches – Confederation of Passenger Transport - <https://www.cpt-uk.org/news/backing-britain-s-coaches-a-coach-strategy-for-britain/>

The overarching aims of the Western Gateway STB Coach Strategy are:

- to explore the current state of play of coach service provision and associated infrastructure;
- to confirm the key challenges facing coach services in the area; and
- to identify opportunities for improvements to coaches, within the framework of the Strategic Transport Plan's objectives and desired long-term outcomes.

Report Structure

The Coach Strategy report is made up of a series of chapters:

- **Chapter 2 – Methodology:** a brief overview of how the Coach Strategy has been developed;
- **Chapter 3 – Geographical Context:** a description of the Western Gateway, including key settlements;
- **Chapter 4 – Policy Context:** an overview of the regional, local and national policy framework which surrounds the development of the Coach Strategy;
- **Chapter 5 – Regional Transport infrastructure:** an overview of key inter-urban transport infrastructure links including roads as well as railways;
- **Chapter 6 – The UK and Western Gateway area Coach Sector:** a detailed discussion on the coach sector both nationally and regionally within the Western Gateway, including existing services, operators, licencing, regulations, types of vehicles, and types of stops/interchanges;
- **Chapter 7 – Challenges:** an overview of the key challenge themes and specific issues which have been identified in the Western Gateway;
- **Chapter 8 – Objectives and Interventions:** proposed objectives, an outline of recommended interventions for addressing the challenges, and assessment against the objectives and key criteria; and
- **Chapter 9 – Next Steps:** recommendations are put forward for some further investigations to be carried out subsequent.

A separate Appendices document accompanies the Coach Strategy which contains the following:

- **Appendix A** – Coach Operators outside Western Gateway sending vehicles into the Gateway area
- **Appendix B** – List of Scheduled Coach Routes operating in the Western Gateway
- **Appendix C** – Mode Availability between key origins and destinations
- **Appendix D** – Settlements with no direct scheduled coach service
- **Appendix E** - Level of Car Demand and Mode Availability between key settlements within each Multi Modal Corridor
- **Appendix F** - Mode Comparison of journey times, fares and frequencies
- **Appendix G** – Site Visits
- **Appendix H** - Proposed New Coach Service route, supporting analysis



Methodology

2. Methodology

Overview

This chapter sets out the method used to develop the Coach Strategy. The strategy has been developed by AECOM on behalf of the STB in discussion with a range of stakeholder groups.

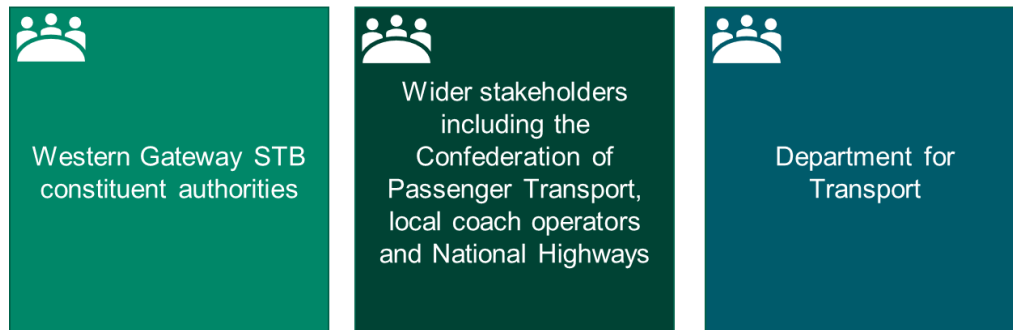


Figure 2 - Organisations involved in the development of the Coach Strategy

The development process for the Coach Strategy is split out into two core stages as shown in the figure below.

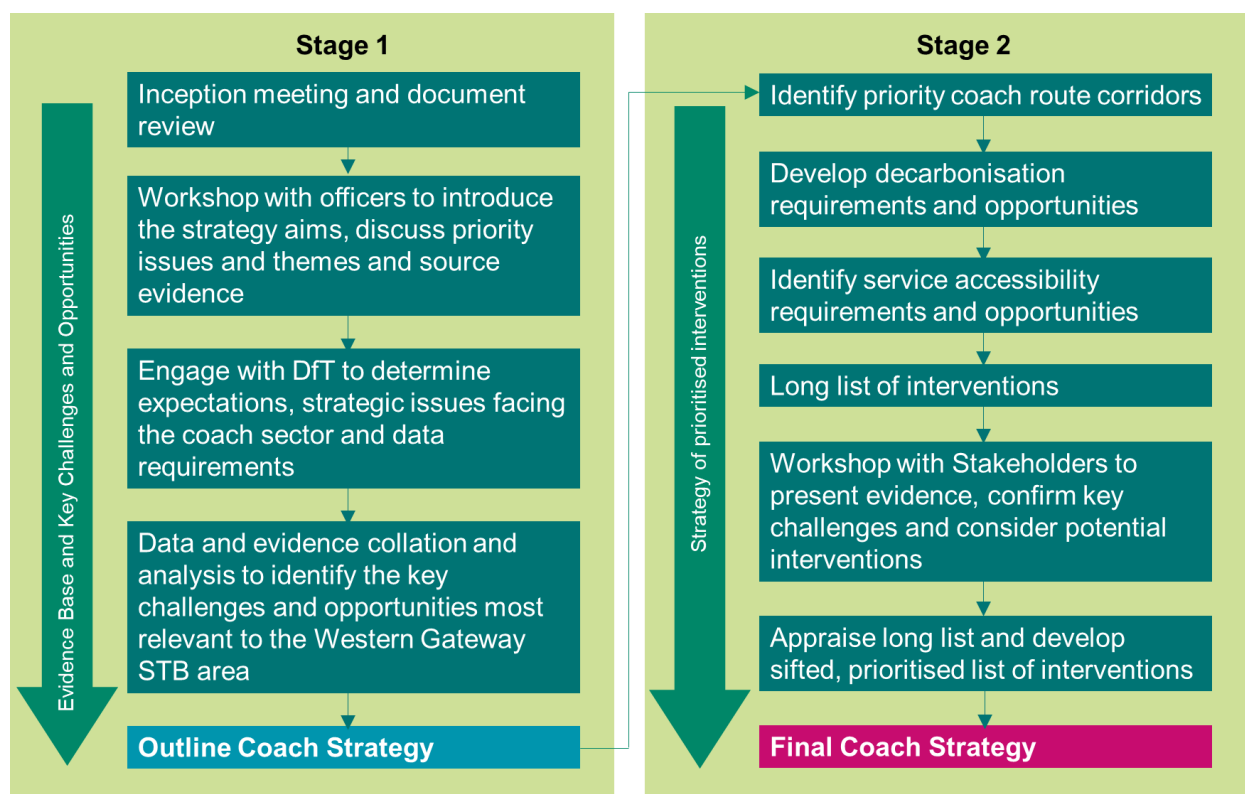


Figure 3 - Methodology for development of the Coach Strategy

Stage 1 has involved a process of collecting, compiling and analysing data and evidence from a range of sources include stakeholder feedback, existing data sets and primary research. This process has led to the development of the Coach Strategy (this document).

Stage 2 will involve a process of gathering feedback on the Stage 1 output to refine a list of potential interventions and actions that the Strategy could champion. This list will be

appraised, sifted and a prioritised list of interventions and actions produced. This will then form the final Coach Strategy.

Background data

A significant challenge with developing the Coach Strategy has been the limited availability of detailed data including information on scheduled coach service routes, fares, operators, passenger demand and on private hire and education services.

The following information has been compiled specifically to inform the strategy:

- **scheduled coach services** including timetabled routes, stopping patterns, service frequencies, journey times, fares and operators (compiled using online searches of operator websites including National Express);
- **locations of coach stops and interchanges** (for scheduled services), **drop-off locations and longer-term parking and layover spaces** (compiled using online research from operator websites and local information provided by coach operators and local authorities);
- information on **facilities for passengers** and coach drivers at key locations (observed on a series of site visits to case study locations);
- **car demand** between key settlements across the region, used to gauge the level of coach passenger demand and potential for modal shift (obtained using National Highways' South West Regional Transport Model (SWRTM));
- details of **coach operators** based in the Western Gateway STB region, including locations and fleet size;
- information on **coach tours/holidays** operating in the STB region;
- for comparison with scheduled coach services, details of **rail and inter-urban bus routes**, stopping patterns, service patterns, journey times, fares and operators (compiled using online search of operator websites); and
- for comparison with other modes, details of **car journey times** (compiled using online journey planning tools).

Furthermore, discussions have also been held with policy officers, local coach operators, the Confederation of Passenger Transport and National Highways to source additional details and verify assumptions.

It has not been feasible to obtain information about the number of coach passengers using different types of services and the socio-demographic profile of coach passengers. However, additional data sources including the SWRTM, National Travel Survey and the Census have been used to gain a broad appreciation of potential coach passenger demand across the Western Gateway STB area.

Policy review & Officer Working Group

A review of the policy context in which this strategy will sit has been conducted and this review is summarised in Chapter 4.

In addition to this, and in order to ensure officer's knowledge of the sector was gathered, an interactive discussion was facilitated, using Miro, an online collaborative platform that enabled participants to share ideas and brainstorm online. Questions were posed regarding future

growth in the area, challenges and opportunities that should be associated with the Coach Strategy and what a vision for the strategy might look like.

Stakeholder Meetings

A series of meetings have been conducted with stakeholders in the Western Gateway coach sector, including:

- **Department for Transport:** A meeting was held in July 2022 to discuss the national context for coaches and the limited availability of data;
- **Confederation of Passenger Transport (CPT):** Two meetings held in November 2022 to collect information about the key issues facing the coach sector, both at a national level and in the Western Gateway STB region specifically;
- **Bennett's Coaches:** One meeting held in November 2022 with the Gloucestershire-based operator to gather views on the key issues facing the business;
- **Bus Users UK:** A meeting was held in August 2022 with the charity to gather views on particular issues passengers experience with accessing coach services; and
- **National Highways:** A meeting was held in December 2022 to discuss National Highways' objectives for facilitating coach movements on the motorway and major A road network.

At these meetings a written 'issues log' was shared so that participants could provide the study team with their view of the significance of various issues facing the coach sector. They were asked to respond stating how significant they believed each issue was, and asked to provide information on additional issues they believed should be included. These responses have been used to validate the information the team collected on the challenges facing the sector which are discussed in chapters 6 and 7 of this report.

Site Visits

In November 2022 a series of site visits were undertaken to the Western Gateway area, primarily to make observations and carry out audits of passenger facilities at key stops and interchanges at case study locations in Bristol, Gloucester, Cheltenham, Salisbury, Bournemouth and Poole.



Geographical Context

3. Geographical Context

Key Settlements

The Western Gateway STB area is a mostly rural region with significant areas of low population density, however it does feature some major urban areas and conurbations with particular concentrations in the north/north-west and south of the region, as can be seen in Figure 4.

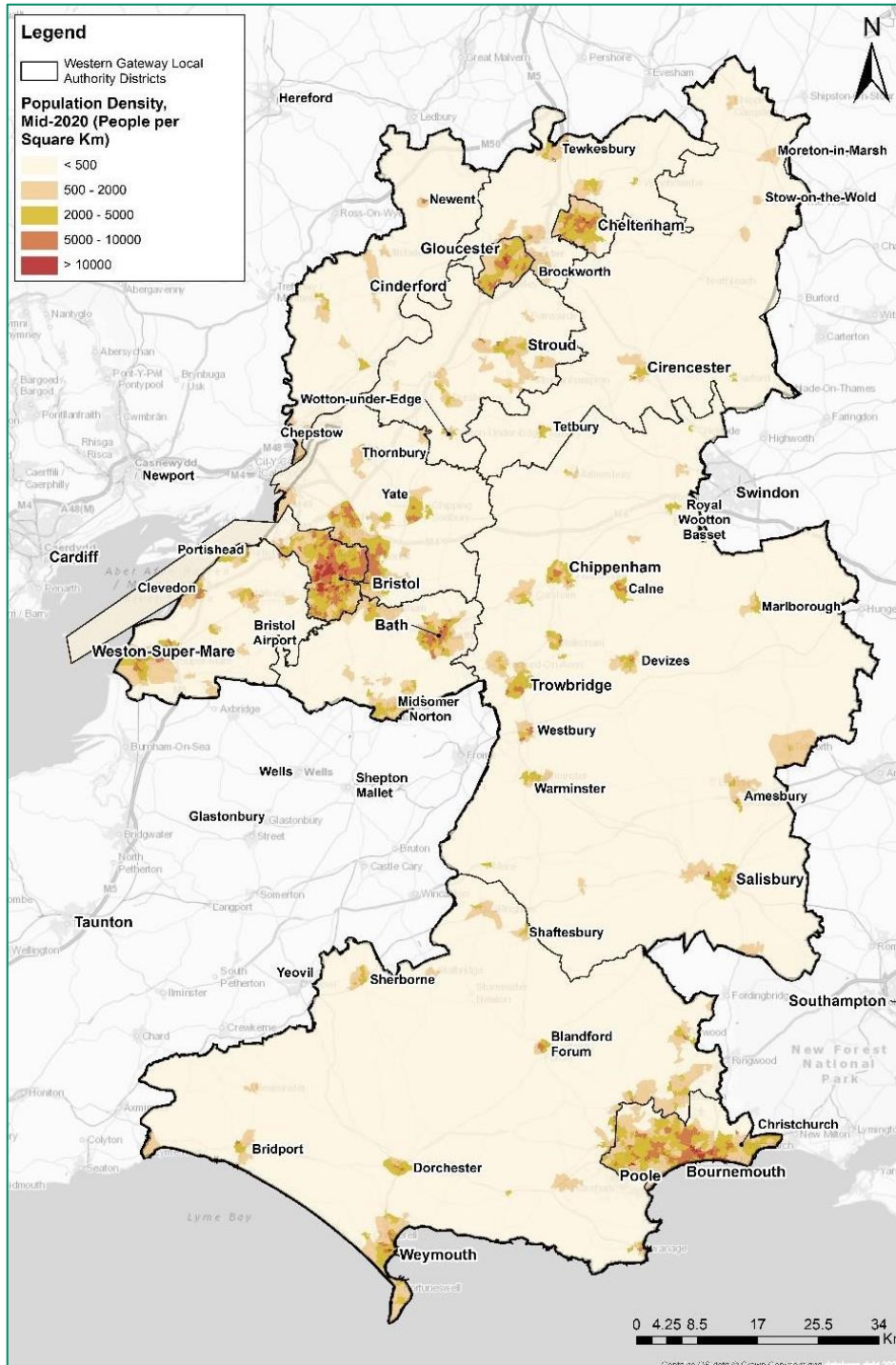


Figure 4 - Population Density in Western Gateway

The largest urban area in the region is Bristol, with a total of 472,400 residents within the City itself. The Bournemouth-Poole-Christchurch conurbation is also significant with 400,300

residents. The rest of the Western Gateway area is made up of smaller settlements including the cities of Gloucester, Cheltenham and Bath. The population of the Western Gateway STB constituent authorities is shown in Table 1.

Table 1 - Resident Population in the Western Gateway (2021 Census)

Local Planning Authority	Resident Population
Bath and North East Somerset	193,400
Bournemouth, Christchurch and Poole	400,300
Bristol (City of)	472,400
Dorset	379,600
North Somerset	216,700
South Gloucestershire	290,400
Wiltshire	510,400
Gloucestershire	645,100
Cheltenham	118,800
Cotswold	90,800
Forest of Dean	87,000
Gloucester	132,500
Stroud	121,100
Tewkesbury	94,900
TOTAL	3,108,300

Several large settlements surround the Western Gateway STB and in some cases sit close to the boundary, including Southampton, Taunton, Newport, Hereford, Worcester, Oxford, Swindon and Andover. Whilst not part of the Western Gateway STB area, the population of Somerset County Council area (which excludes the unitary authority areas of North Somerset and Bath and NE Somerset) is 571,600.

Further beyond are the cities of London, Cardiff, Plymouth and Birmingham which are important hubs in the context of long-distance coach services.

Employment density

The following figure shows employment density across the STB area. This broadly corresponds with the population density map, but with even greater concentrations of employment within the largest urban centres of Bristol, Bath, Gloucester, Cheltenham, Bournemouth, Poole and Dorchester. It is important to note that the northern area of Bristol, which falls into South Gloucestershire, around Filton and Cribbs Causeway is also a major centre for employment.

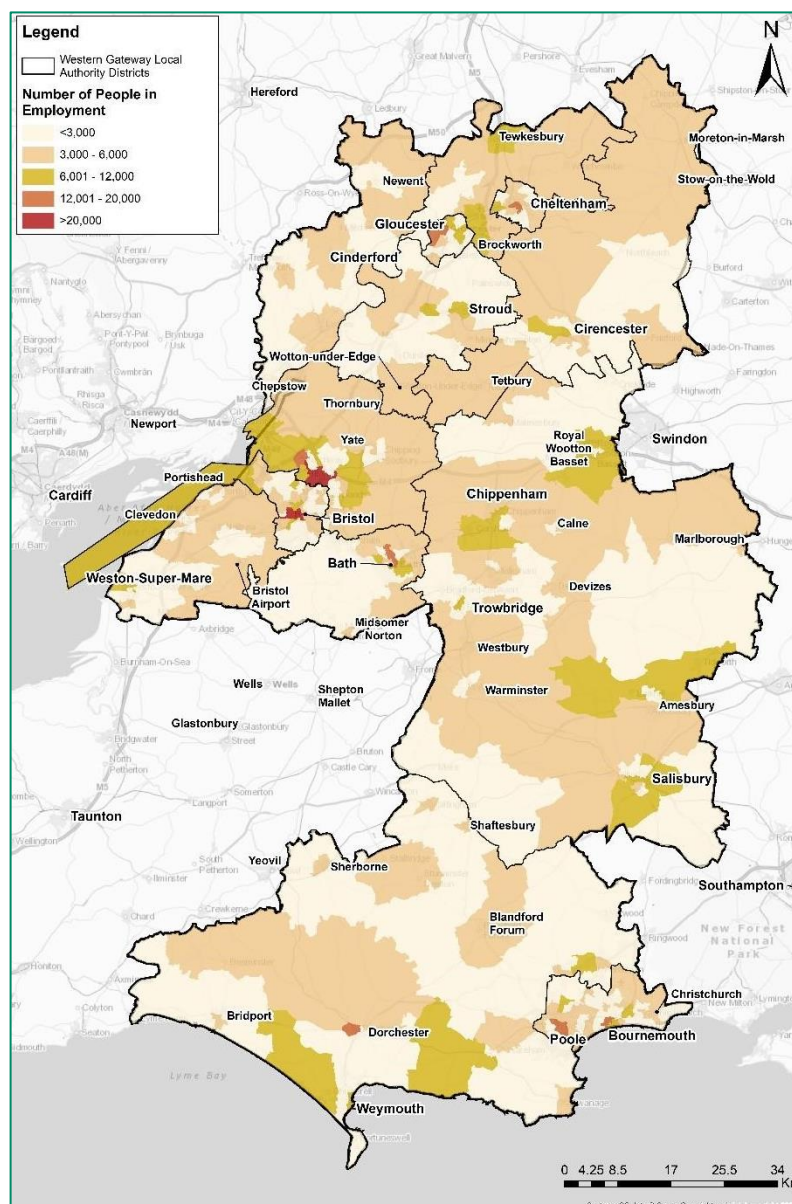


Figure 5 - Employment Density Higher

Education

There are several large university and higher education establishments located across the Western Gateway STB area. The largest are the University of the West of England (Bristol) (34,410 students), University of Bristol (29,785 students), University of Bath (18,555 students), Bournemouth University (17,700 students), Bath Spa University (9,235 students) and the University of Gloucestershire (8,190 students). Smaller institutions include the Arts University in Bournemouth, Hartpury University located outside of Gloucester and the Royal Agricultural University located outside of Cirencester.

Trip Attractors

The Western Gateway STB area is a popular tourist region due to the rich cultural heritage, natural beauty of the area and popular coastal resorts.

Tourist attractions range from museums to theme parks, archaeological sites and beaches. The locations of the most popular free and paid attractions in the study area are shown in the next figure. The most visited attraction, as of 2019, is Stonehenge, the iconic prehistoric landmark on the Salisbury Plain of Wiltshire, which attracted 1,604,428 annual visitors in the

last year before the outbreak of the COVID pandemic. Two further destinations were visited by over one million tourists in 2019: the Roman Baths in Bath (1,325,085 annual visitors) and the Longleat stately home in Wiltshire (1,011,314 annual visitors). From the attractions that can be visited for free, the most popular destination in 2019 was Bath Abbey with 517,838 annual visitors. Also shown are the extent of 'Areas of Outstanding Natural Beauty' (AONB) across the Western Gateway.

The wide and beautiful open spaces in this part of England make for great festival locations. One of the most famous music festivals in the world, the Glastonbury Festival, takes place in Somerset, near to the Western Gateway STB boundary.

The Gateway area is also home to several famous racecourses, such as Cheltenham and there are other notable sports venues including football and rugby stadiums.

All of the area's urban centres will attract visitors for shopping and leisure including theatres and cinemas, with Bristol being the largest destination. Outside of the main urban centres, there are many out of town retail destinations, the most prominent being the Cribbs Causeway Mall which is located on the north-western outskirts of Bristol.

But by far the biggest draw for tourists is the coastline with for example over 5 million people visiting the Jurassic coast each year, 4 million to Weymouth and over 11 million to Bournemouth in the year to August 2022.



Figure 6 - Pulteney Bridge and Weir in Bath

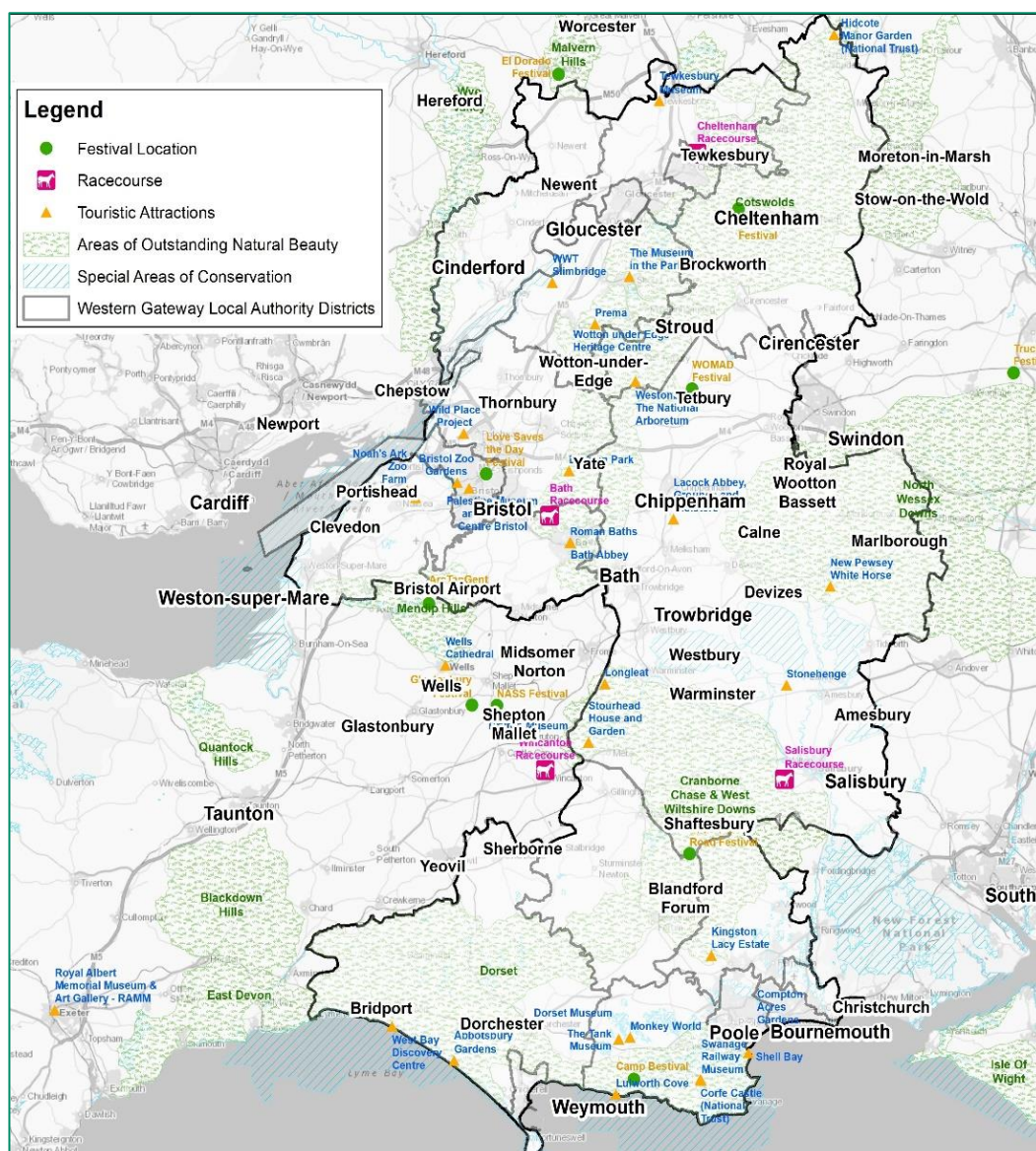


Figure 7- Major Attractions, including Special Conservation Areas and Areas of Outstanding Natural Beauty (AONB) Planned Growth

The need for additional housing is one of the most important requirements across the whole of the Western Gateway STB area. The following table provides a breakdown of projected new homes and jobs/employment land in each of the local planning authority areas. It should be noted that the estimates relate to different plan periods and are therefore out of sync by at least ten years. Most of the authorities are preparing new plans which are at varying stages of development and adoption, and some have not published up to date forecasts. The figures are therefore subject to change.

Where a more detailed breakdown of figures by settlement within each authority is available, this is also stated below however this information has not been obtained for all authorities.

Whilst the figures may be subject to change, it is clear there is a substantial level of housing and employment growth proposed across the Western Gateway area. What is also evident is that there is the potential for substantial development outside of the large settlements, in smaller towns and in rural areas. This is likely to generate additional travel demand to larger settlements and places of employment along inter-urban roads and railways. This may also

indicate an opportunity for scheduled coach services, otherwise there could be increasing reliance upon the private car to make most daily journeys.

Table 2 - Estimated new Homes and Jobs across the Western Gateway area

Local Planning Authority	Additional dwellings	Employment hectares	Plan Period	Notes	Source
Bath and North East Somerset	13,000	10,300 jobs	2011-2029	No equivalent data found in emerging new Local Plan consultation documents covering the period from 2022 to 2042	Core Strategy and Place Making Plan ²
Bournemouth, Christchurch and Poole	25,600	11,000 jobs	2018-2038	Alternative model estimate of new homes	Local Plan Issues and Options Consultation Document ³
Bristol (City of)	34,700	No data	2023-2040	Based on 2,000 homes per year 2023-2027, 1,900 homes per year 2028-2040	Bristol Local Plan Review: Draft Policies and Development Allocations - Further Consultation November 2022 ⁴
Dorset	30,481	131 hectares	2021-2038		Local Plan Consultation Jan 2021 ⁵
North Somerset	20,085	70 hectares	2023-2038		Local Plan 2038 Consultation Draft Preferred Options ⁶
South Gloucestershire	24,354	10 hectares	2024-2042	Based on National Standard Method	Local Plan 2020 Phase 2 ⁷
Wiltshire	20,400	9 hectares	2016-2036		Emerging Strategy 2016 ⁸
Calne	1,610	4 hectares			
Chippenham	9,225	5 hectares			
Corsham	815	-			
Devizes	1,330	-			
Malmesbury	665	-			
Melksham	3,950	-			
Rest of HMA	2,805	-			
Gloucester, Cheltenham and Tewkesbury (the Boroughs of)	35,175	192 hectares / 39,500 jobs	2011-2030		Joint Core Strategy ⁹

² <https://beta.bathnes.gov.uk/development-plan>

³ <https://haveyoursay.bcpccouncil.gov.uk/localplan>

⁴ <https://www.bristol.gov.uk/files/documents/5446-bristol-local-plan-review-nov-22-further-consultation/file>

⁵ <https://www.bristol.gov.uk/files/documents/5446-bristol-local-plan-review-nov-22-further-consultation/file>

⁶ <https://www.n-somerset.gov.uk/sites/default/files/2022-04/30907%20Local%20Plan%20Acc.pdf>

⁷ <https://beta.southglos.gov.uk/publications/local-plan-2020-phase-2-urban-rural-and-key-issues/new-homes-and-jobs-keytargets-and-information/>

⁸ https://www.wiltshire.gov.uk/media/5623/Emerging-Spatial-Strategy/pdf/Wiltshire_Local_Plan_Emerging_Spatial_Strategy_FINAL.pdf?m=637471655274170000

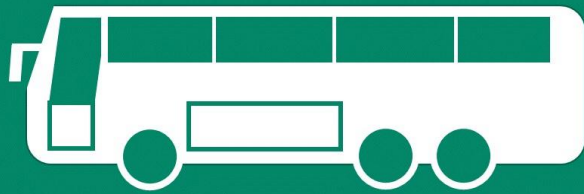
⁹ <https://www.jointcorestrategy.org/adopted-joint-core-strategy>

Local Planning Authority	Additional dwellings	Employment hectares	Plan Period	Notes	Source
Gloucester	14,359	-			
Cheltenham	10,917	-			
Tewkesbury	9,899	-			
Forest of Dean	7,219	No data	2021-2041	Total comprised of total housing new to the Local Plan and existing committed homes	Forest of Dean District Local Plan - Second Preferred Option July 2022 ¹⁰
Stroud	12,600	No data	2020-2040		Local Plan Review Pre-Submission Draft Local Plan Regulation 19 Consultation May 2021 ¹¹
Cotswold	8,400	24 hectares	2011-2031	A new Local Plan is in development	Cotswold District Local Plan 2011-2031 ¹²

¹⁰ <https://www.fdean.gov.uk/media/ruscm3s1/allocations-plan.pdf>

¹¹ https://www.stroud.gov.uk/media/1485600/part-2_pre-submission-draft-plan-2021_final-25-05-21.pdf

¹² <https://www.cotswold.gov.uk/planning-and-building/planning-policy/local-plan-2011-to-2031/>



Policy Context

4. Policy Context

Sub-National Level

The Western Gateway STB has developed a **Strategic Transport Plan**¹³ which details how strategic intra-regional and inter-regional travel can be enhanced in the 2020-2025 period. The document was written during the COVID-19 pandemic so special attention was dedicated to how the transport sector could recover from the many challenges that had surfaced. The plan identifies other key strategic challenges for transport in the Gateway area in the near future including the need to:

- Decarbonise the transport network;
- Improve connectivity;
- Improve rural accessibility; and
- Address the Productivity Gap.

The plan also sets out a series of long-term objectives across three themes - Economic, Environmental and Social. A sample of those which are considered more applicable to coaches is shown in Table 3.

Table 3 - Western Gateway STB Strategic Transport Plan Objectives, Outcomes and Delivery Priorities (sample)

Objectives	Long-term outcomes	Long-term delivery priorities
Economic		
<ul style="list-style-type: none"> • Ensure effective access of labour markets • Improve North-South connectivity 	<ul style="list-style-type: none"> • Quality travel connections • Highly resilient strategic transport network 	<ul style="list-style-type: none"> • High quality strategic transport network • Improved inter and intraregional connectivity
Environmental		
<ul style="list-style-type: none"> • Decarbonisation of the strategic transport network • Adoption of electrification and/or use alternative fuels to enable fossil-fuel free transport 	<ul style="list-style-type: none"> • Integrated passenger transport network • Coherent network of electric vehicle and alternative fuel infrastructure 	<ul style="list-style-type: none"> • Carbon free strategic transport network • Increased strategic travel options

¹³ <https://westerngatewaystb.org.uk/strategy/2020-2025-western-gateway-strategic-transport-plan/>

Objectives	Long-term outcomes	Long-term delivery priorities
Social		
<ul style="list-style-type: none"> • Support multi-modal travel options within travel to work areas • Improve transport and digital connectivity to reduce poverty and deprivation 	<ul style="list-style-type: none"> • Improved access for employment, education and other essential services • Improved user experience of strategic transport networks • Increased collaboration & support for the delivery of innovative ideas 	<ul style="list-style-type: none"> • Safe strategic travel networks that fulfil customer expectations

An important message of the Strategic Transport Plan is that there is a need to create a coherent overarching narrative for larger-scale investments in passenger transport connectivity, one that supports longer-distance bus and coach services which link with flexible local feeder services. In addition, transport decarbonisation is given high priority and it is recognised that there are huge potential benefits for electrification or the use of alternative fuels for buses and coaches which would support the decarbonisation of the transport sector.

The plan also acknowledges the importance of the key sub-national infrastructure schemes listed below and supports their delivery:

- Metrobus - Cribbs Patchway
- Bristol to Bath Strategic Travel Corridor
- Bus Improvement packages across Bath, Bristol, North Somerset, South Gloucestershire, Bournemouth, Christchurch and Poole.
- Mass Transit – West of England

As part of the process of development of the Strategic Transport Plan, 15 strategic travel corridors in the Gateway area have been identified¹⁴, as shown in Figure 8.

These corridors are considered strategic, high-level facilitators of increased economic activity which connect destinations within the Western Gateway and also enhance connectivity with the rest of England.

The strategic corridors are not mode-specific as one corridor can be served by multiple modes. The corridors link strategically important locations across the Western Gateway area, including the main urban centres, ports and airports. The corridors identified either traverse multiple authorities within the Gateway area or provide strategic linkages to neighbouring areas from which the Gateway area will benefit.

Improvements to transport infrastructure along the identified corridors are expected to produce a range of economic benefits, including: unlocking large housing and employment development sites; increasing productivity of local economy by effectively bringing workers

¹⁴ <http://weston.ndm-server.co.uk/wp-content/uploads/2020/08/wg-reb-appendix-a-Economic-Connectivity-Study.pdf>

and employment opportunities closer together; and enhancing other sectors of the economy such as tourism.

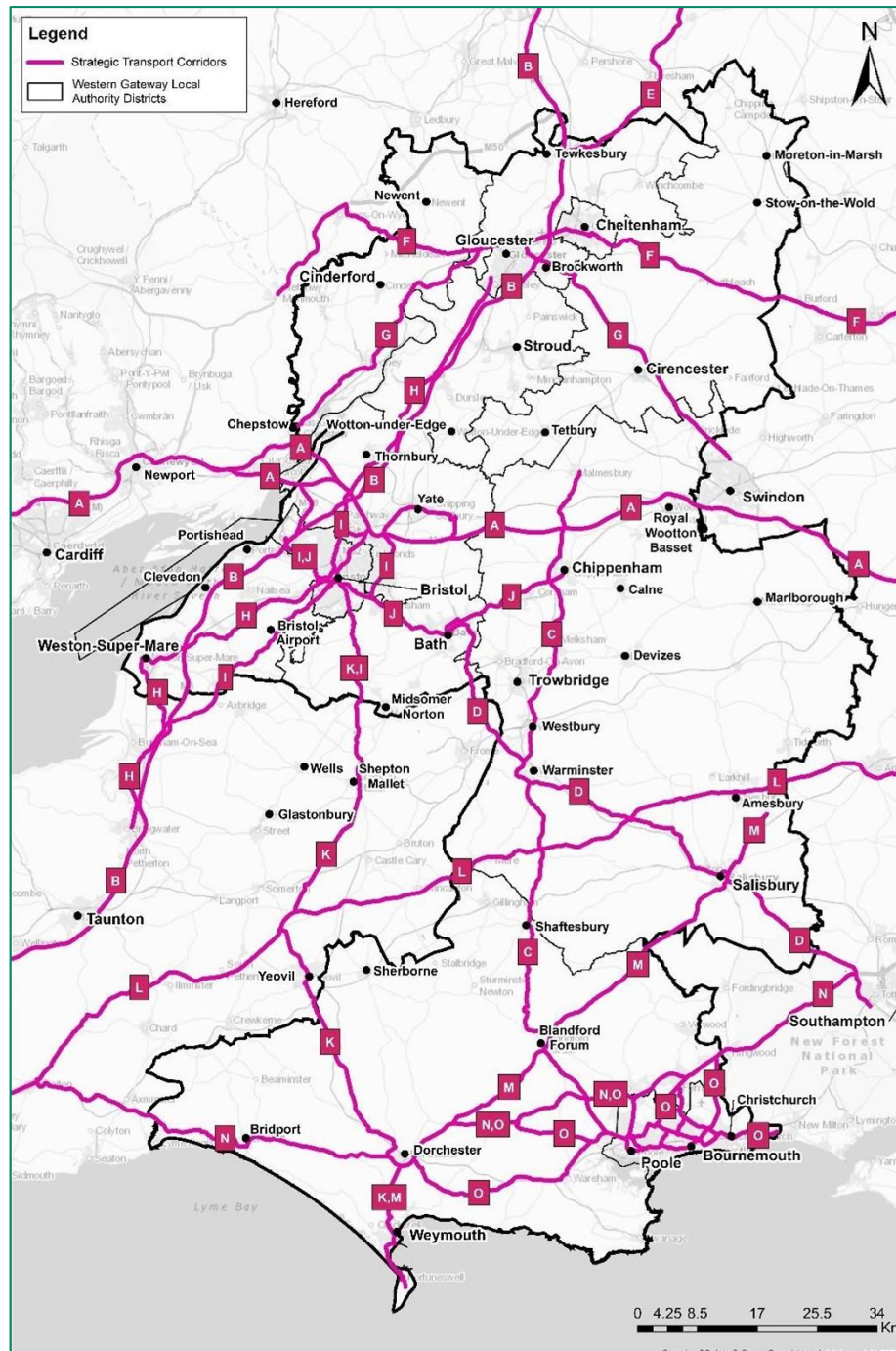


Figure 8 - Western Gateway STB Strategic Transport Corridors

Moreover, four new Strategic Partnership Groups have been formed to provide oversight and support to the production of a long-term Strategic Transport Plan, each representing one of four strategic multi-modal travel corridors identified across the geography of the Western Gateway STB area.

These are shown schematically in Figure 9.

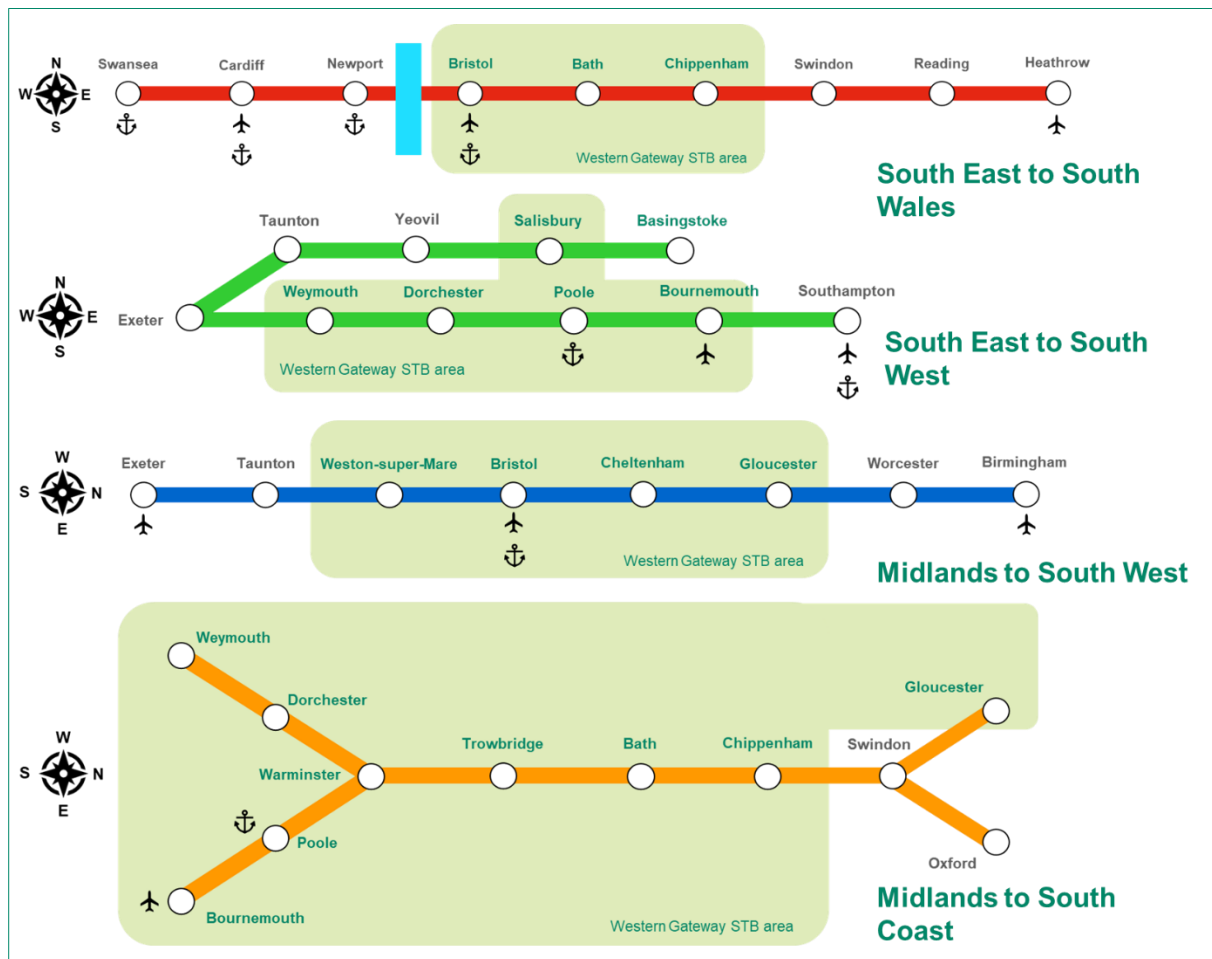


Figure 9 - Western Gateway Multi-Modal Corridors

- The South East to South Wales corridor focusses on the strategic movements along the M4, M32, M48 and A4, and the Great Western and South Wales Main Line railways.
- The South East to South West corridor focusses on the strategic movements along the A303, A31/A35 and the West of England and South Western Main Line railways.
- The Midlands to South West corridor focusses on the strategic movements along the M5, A38 and A46 (part of the Midlands Connect STB Trans-Midlands Trade Corridor). It also encompasses the Cross Country and Bristol to Exeter railway service routes.
- The Midlands to South Coast corridor focusses on the strategic movements along the A36, A37, A338, A350, A354 and A358. This corridor encompasses several railway routes including the Golden Valley Line (Swindon-Gloucester-Cheltenham), the Heart of Wessex Line (Bristol-Weymouth) and the TransWilts rail link (Swindon-Westbury).

Each Strategic Partnership Group will oversee the production of a multi-modal corridor plan which, once completed, will form part of the Western Gateway's long-term Strategic Transport Plan which is scheduled for completion in 2023.

The Western Gateway STB, in partnership with Peninsula Transport STB (a neighbouring sub-national transport body covering Somerset, Devon and Cornwall) has published a **South West Rural Mobility Strategy**¹⁵ which sets out mobility policy to enhance connectivity of rural communities across the South West of England. This strategy presents the case for

investment in mobility for rural places. Reducing emissions from rural transport, providing alternatives to the dominance of private cars, improving digital communications that would reduce the need to travel are all identified as key policies that require investment in order to achieve the desired targets.

The strategy identifies the concept of Rural Hubs, where mobility and community or commercial activities are integrated, as the central element for the future of rural mobility in the region. The hubs are imagined also as where local public transport services connect with longer-range services, constituting a hub and spoke model which is expected to produce sufficient demand to support the growth of inter-urban services as well as to enhance access for local communities to a wider public transport network.

The joint document calls for a holistic approach to delivering transport improvements: as it is argued that implementing individual interventions may generate some benefits but a whole system approach with individual new interventions working together with the existing mobility network may be more likely to support a more integrated and consequently better functioning rural mobility system. To address this issue, the strategy presents a bundling/packaging approach, in which a set of mobility interventions are delivered at the same time including investment in different transport modes, services and supporting infrastructure.

Another joint strategy document published by Western Gateway and Peninsula Transport is the **Freight Strategy for the South West**¹⁶. This strategy analyses the characteristics of freight transport in the region noting that whilst in the neighbouring Peninsula area, a significant number of goods are lifted internally within the region, in the Western Gateway area freight transport is dominated by outbound movements. There are many shared characteristics and challenges between the freight and coach sectors, including the difficulty in attracting and retaining drivers, higher operating costs, lack of reliability of certain routes and in some areas a poor road network. Therefore, the evidence and recommendations from the Freight Strategy has been used to inform the development of the Coach Strategy.

Local Transport Policies

Local authorities in the UK are required to publish a **Bus Service Improvement Plan** (BSIP) in which local transport authorities (LTAs) in collaboration with bus operators and local communities set out a vision for delivering the step-change in bus services that is required by the national bus strategy¹⁷.

BSIPs mostly focus on local, urban and inter-urban bus services with little if any consideration of coach services. Still, some of the challenges by coaches are the same for buses, so some of the interventions identified to improve bus services are likely to have a positive impact on coaches as well, including improvements to stops/interchanges and priority traffic lanes.

The following BSIPs have been produced which cover the Western Gateway STB area:

- West of England Combined Authority BSIP;
- Gloucestershire BSIP;

- Wiltshire BS¹⁵;
- Dorset BSIP¹⁶; and
- Bournemouth, Poole and Christchurch BSIP¹⁷.

The BSIPs that cover the larger urban areas in the Western Gateway point out the high level of congestion in urban centres which also affect the speed of buses with subsequent negative effect on the attractiveness of this mode¹⁸¹⁹. For this reason, especially in Bristol and Bournemouth but also to some extent in smaller settlements, bus priority measures are identified as an essential element to promote the efficiency of bus networks in core urban areas and as a way to promote modal shift.

Less densely populated rural and suburban areas face different challenges, for example the infrequency of services, which makes buses an unreliable option for local communities, and this is even more relevant to coaches. In order to enhance access to public transport, all BSIPs mention the ongoing testing or planned investment in demand-responsive-transport, which can make passenger transport provision more flexible and less costly to run in those areas where passenger demand is lower and doesn't follow exact route patterns²⁰.

In addition, interchange or mobility hubs are highlighted as another tool to foster the efficiency of transit networks as they can provide easier interchange between local bus services and longer-distance modes such as rail and coach²¹. Mobility hubs can also be the driver for jobs creation and local economic development as around these hubs better opportunities for commercial activities can emerge and more efficient public transport can enhance access to employment locations for rural communities.

Each local transport authority has a **Local Transport Plan**. The City of Bristol, South Gloucestershire, Bath & North East Somerset and North Somerset have a Joint LTP²². In the joint LTP, it is recognized that coaches should be used strategically alongside the rail network and their role should be supported both for residents and visitors. The JLTP also recognises how scheduled coach services do not currently represent a viable alternative to rail along important transport corridors that are currently served only by slow and often indirect stopping services, such as the Bristol-South Coast corridor. In addition to this, the DfT will be consulting on new Local Transport Plan guidance in 2023, which will be considered further.

Other LTPs also consider the role of coaches, for example the Gloucestershire LTP²³ which features a specific policy on coach travel. Policy LTP PD 1.4 states the commitment of Gloucestershire County Council to 'work with coach operators to provide a reliable and efficient coach network that supports the County's bus network, connects interchange hubs in towns and cities, and provides for tourist day trips to key locations in and to Gloucestershire'.

¹⁵ <https://www.wiltshire.gov.uk/article/4882/Bus-Service-Improvement-Plan>

¹⁶ <https://www.dorsetcouncil.gov.uk/bus-service-improvement-plan/bus-service-improvement-plan>

¹⁷ <https://www.bcpccouncil.gov.uk/News/News-Features/Transforming-Travel/National-Bus-Strategy-for-England.aspx>

¹⁸ Bus-Service-Improvement-Plan (bcpccouncil.gov.uk)

¹⁹ Bus Service Improvement Plan - West of England Combined Authority (westofengland-ca.gov.uk)

²⁰ Bus Service Improvement Plan - Wiltshire Council

²¹ About the Bus Service Improvement Plan - Dorset Council

²² Joint Local Transport Plan - Combined Authority (westofengland-ca.gov.uk)

²³ Gloucestershire LTP (2020-2041) - Gloucestershire County Council

The attention to coaches varies across local authorities in the Gateway also because different areas attract very different levels of coach travel. Bath is certainly one of the settlements that attract more tourists, many of whom choose to travel there by coach. Bath & North East Somerset Council commissioned a **Coach Parking Strategy for Bath**²⁴. The strategy surveys the existing coach infrastructure in and around Bath and how the various facilities are used, before going on to assess potential future parking and drop-off sites. The document also looks at aspects such as how technology can help improve the management of coach parking, for instance pre-booking systems or the use of parking sensors, or how Bath's coach charging regime can be improved.

Clean Air Zones (CAZs)

In the UK, local authorities need to abide by the legal limit for concentrations of nitrogen dioxide (NO₂) of 40µg/m³ as an annual average set by the government. Some of the major urban areas in the Western Gateway STB area have been found exceeding this limit and hence have sought new ways to reduce air pollution.

As a response, Bath and North East Somerset Council introduced a **Clean Air Zone (CAZ)** in Bath city centre in March 2021^{25,26}. A CAZ is an area of an urban centre where access for polluting vehicles is allowed only upon payment of a fee. There are different types of CAZs depending on what categories of vehicles are required to pay the charge. In Bath, a Class C zone was introduced meaning that all private cars and motorcycles are exempt from paying the charge²⁷. Buses, coaches, minivans, taxis, private hire vehicles, trucks and lorries are all subject to the charge if they do not comply with the CAZ requirements.

Under current CAZ regulations vehicles are compliant, hence do not need to pay the charge, if they are powered by a Euro 4 or better petrol engine or by a Euro 6 diesel engine. All hybrid and electric vehicles are exempt from the charge. Charges vary from £9 to £100 depending on the type of vehicle. Automatic number plate recognition cameras were installed on all roads leading into the zone. If motorists do not declare their chargeable vehicles and do not pay for their journey, they receive a penalty charge notice. As part of CAZs deployment, incentives are provided for people who own a non-compliant vehicle and who want to upgrade it to a less polluting and CAZ-compliant vehicle.²⁸

Bristol introduced a similar CAZ in November 2022. Bristol CAZ is a Class D meaning that also private cars that do not comply with the emission standards will have to pay the charge. Exemptions are the same as for other vehicles, thus, charges do not apply to some vehicles including those listed below, which are estimated to make up around 71% of the total vehicles that currently travel around Bristol²⁹:

- Euro 4, 5 and 6 petrol vehicles, roughly 2006 upwards
- Euro 6 diesel vehicles, roughly end of 2015 onwards
- Fully electric vehicles and hydrogen fuel cell vehicles
- Modified or retrofitted vehicles registered with the Energy Saving Trust's Clean Vehicle Retrofit Accreditation Scheme (CVRAS)

²⁴ Coach Parking in Bath (bathnes.gov.uk)

²⁵ Bath Clean Air Zone Charging Order 2021 (bathnes.gov.uk)

²⁶ About the Bus Service Improvement Plan - Dorset Council

²⁷ Charges in Bath's Clean Air Zone (bathnes.gov.uk)

²⁸ Clean air zones – Get support to reduce your emissions GOV.UK (www.gov.uk)

²⁹ Bristol's Clean Air Zone charges and vehicle checker (Bristol.gov.uk)

- Motorbikes

National Transport Policies

The Transport Investment Strategy³⁰, 2017 sets out how the government sees the allocation of monies to transport projects supporting their goals for economic growth and infrastructure improvements. The strategy simultaneously seeks to put the travelling public at the heart of transport decision-making. The strategy also stresses the need for decision-making to be more focussed and undertaken at a more local level than previously, endorsing Sub-National Transport Bodies and aiming to create institutional decision-making frameworks.

The four key objectives of transport investment are listed as:

- Create a transport network that works for users, wherever they live;
- Improve productivity and rebalance growth across the UK;
- Enhance our global competitiveness by making Britain a more attractive place to invest; and
- Support the creation of new housing. investment away from traditional areas, such as London and the South-East of England, in order to support productive economic growth across the UK.

The proposal, outlined in the Transport Investment Strategy, makes reference to the Major Road Network (MRN) covering economically important 'A' Roads within local authorities and is supported by the following five policy objectives:

- Reductions in congestion;
- Supporting economic growth and rebalancing;
- Supporting housing delivery;
- Supporting all road users; and
- Supporting the Strategic Road Network (SRN).

The MRN is not managed or operated any differently from the remainder of the local authority road network. In the Western Gateway STB area the MRN includes the A40, A338, and A350. It is important to note that some locally significant north-south A-road routes such as the A338 (north of Salisbury) and A346 do not form part of the MRN.

The Government has also announced £3.5 billion from the National Roads Fund is to be spent on local roads, including improvements to the MRN and for schemes classified as Large Local Major schemes.

The Department for Transport Outcome Delivery Plan 2021-2022³¹ sets the short-term strategy for delivering the priority outcomes identified in the various policy documents. The priority outcomes, on which the DfT intends to focus, are:

- Improve connectivity across the UK and grow the economy by enhancing the transport network;
- Build confidence in the transport network after COVID-19; and

³⁰ Transport investment strategy - GOV.UK (www.gov.uk)

³¹ Department for Transport Outcome Delivery Plan - GOV.UK (www.gov.uk)

- Tackle climate change and improve air quality by decarbonising transport.

The delivery plan also reiterates the role of transport connectivity in the context of the wider levelling-up strategy, as transport is seen by the government as an essential element in the creation of high-performing markets, and increased agglomeration (e.g. clustering of industry sectors within a single area) and linkages between key sectors of the economy.

Decarbonising Transport: Setting the Challenge, 2020³² is a policy and baseline report establishing the groundwork from which the updated **Transport Decarbonisation Plan, 2021³³** (TDP) will work. The decarbonisation plan acknowledges the fact that transport is the largest contributor to UK domestic GHG emissions, responsible for 27% in 2019, a figure that does not include international aviation and shipping. A step change is therefore required in the breadth and ambition in the transition towards a net-zero transport system, in order to achieve the global warming limitation targets set by national laws and international agreements. The plan outlines a set of strategic priorities for the transport decarbonisation pathway:

- Accelerating modal shift to public and active transport;
- Decarbonising Road Transport;
- Decarbonising how we get our goods;
- Place-based solutions;
- UK as a hub for green transport, technology, and innovation; and
- Reducing carbon in a global economy.

These strategic priorities are backed by a long list of commitments by the DfT, covering actions aimed at decarbonising all forms of transport as well as to supporting the key enablers of multi-modal decarbonisation. The key enablers include: zero emission vehicles, low carbon fuels, hydrogen and investment in research and development.

The Future of Mobility: Urban Strategy, 2019³⁴ focusses on innovative transport options that are expected to arise in urban areas in the near future and outlines how the government plans to maximise the benefits that they may bring. It details the benefits of cleaner, automated transport, new ways of doing business and travelling, and potential boosts to the economy that come along with them. It also highlights the need to manage the introduction of new technologies to prevent additional congestion outweighing the benefits they would bring.

The strategy acknowledges the challenge that increasing travel demand poses to the existing network, with potential negative outcomes such as road congestion and inefficiency. It is also stressed how important it is to avoid the introduction of new, “smart” options at the expense of existing active and sustainable modes. In this context, the DfT coins the definition: ‘Future of Mobility Grand Challenge’, to signify how the department aims to capitalise on this period of change in transport to make the UK a world leader in mobility innovation.

The strategy sets out that the government’s approach to introducing innovative mobility solutions which should follow a set of guiding principles, including:

- Mass transit must remain fundamental to an efficient transport system;

³² Decarbonising Transport: Setting the Challenge (publishing.service.gov.uk)

³³ Transport decarbonisation plan - GOV.UK (www.gov.uk)

³⁴ Future of mobility: urban strategy - GOV.UK (www.gov.uk)

- New mobility services must lead the transition to zero emissions;
- Mobility innovation must help to reduce congestion through more efficient use of limited road space, for example through ride sharing, increasing occupancy or consolidating freight;
- New mobility services must be designed to operate as part of an integrated transport system combining public, private and multiple modes for transport users; and
- Data from new mobility services must be shared where appropriate to improve choice and the operation of the transport system.

As part of the government's focus on sustainable transport, the levelling up agenda and responding to the target of net-zero carbon emissions by 2050, the **National Bus Strategy: Bus Back Better, 2021**³⁵, seeks a step-change in the delivery of bus services with many more people using more reliable and quicker buses at cheaper fares. The Strategy builds on the Bus Services Act 2017³⁶, and gives Local Transport Authorities the potential for much greater influence over bus services in their area, underpinning new types of statutory partnerships such as the Enhanced Quality Partnerships.

The obstacles to the delivery of better bus services, identified by the Bus Back Better document are limited cooperation (between operators), lack of evening services, complex ticketing, poor integration. 'Bus Back Better' aims to tackle these obstacles to make bus services an attractive alternative to the car for more people. As mentioned earlier, the strategy does not clearly cover coach services.

As referenced earlier in the report, the Confederation of Passenger Transport (CPT) has put forward its **Backing Britain's Coaches – a Coach Strategy for Britain**³⁷ which sets out its growth. The key message of the document is that the coach sector can be instrumental to achieve decarbonisation goals and to tackle other transport problems such as traffic and congestion. However, the sector has been hit hard by the pandemic and the CPT requests UK government fiscal support to put the sector back on its feet, and the instruments suggested to help coach operators is the delivery of sector specific grants to coach operators.

In 2021, DfT published **Inclusive Mobility: A Guide to Best Practice on Access to Pedestrian and Transport Infrastructure**³⁸. The strategy provides up-to-date guidance on designing and improving the accessibility and inclusivity of public transport and pedestrian infrastructure. This guidance was informed by research⁴² that the DfT published in February 2020.

The purpose of the guidance is to assist transport providers with developing schemes that offer good access for disabled people and meet the needs of those with varying mobility requirements. Good accessible design also helps meet needs and improve environments for many other people, for example those with pushchairs or carrying heavy luggage. Infrastructure for the coach sector tends not to receive frequent or significant investment and is therefore vehicles and stops are likely to be aging and non-compliant with standards such as this, and good design practice in general. Making use of the latest accessibility and design guidance when funding is available for coach stop and coach parking improvements will ensure these investments meet the needs of as many different users as possible.

³⁵ Bus back better - GOV.UK (www.gov.uk)

³⁶ Bus Services Act 2017: new powers and opportunities - GOV.UK (www.gov.uk)

³⁷ Backing Britain's Coaches (cpt-uk.org)

³⁸ Inclusive Mobility: A Guide to Best Practice on Access to Pedestrian and Transport Infrastructure (2021)



Regional Transport Infrastructure

5. Regional Transport Infrastructure

This chapter of the report outlines the key road and railway infrastructure links across the Western Gateway STB area.

Key Roads

The M4 and M5 motorways traverse the STB area. The M4 runs broadly east-west across the northern half of the STB area, connecting London, Reading and Swindon to the east with South Wales to the west and skirting the north of Bristol. Figure 10 shows the main roads network in the region.

The M5 runs broadly north/north-east to south/south-west, connecting Birmingham and Worcester to the north and Taunton and Exeter to the south-west, threading between Gloucester and Cheltenham, skirting to the west of Bristol and east of Weston-super-Mare.

Other motorway connections are the M32 which connects the M4 with central Bristol, the M48 which forms the Severn Bridge, and M49 which cuts the corner between the M5 and M4 Prince of Wales Bridge.

There is an extensive A-road network across the region. North of the M4, key A-roads include the A38 which runs parallel with the M5 for much of its length, connecting Gloucester with Bristol; the A40 which connects Monmouthshire (South Wales) and Wye Valley to the west, bypasses to the north of Gloucester, routes through Cheltenham and heads south-east to Oxford; the A429 linking the M40 and Royal Leamington Spa to the north-east via Stow-on-the-Wold, Bourton-on-the-Water, Cirencester the Cotswolds Area of Outstanding Natural Beauty, Malmesbury and the M4; and A417/A419 linking Gloucester, Cirencester and Swindon.

South of the M4, key A-roads include the A4 linking Bristol, Bath (via the A36) and Chippenham; the A31 and A35 linking Southampton to the east and Honiton to the west via Dorchester and skirting the north of Bournemouth; the A36 linking Bath and Southampton via Warminster and Salisbury; the A46 including the link between the M4 and Bath; A303 which links the M3 corridor to the east and Devon to the south-west and bypassing to the north of Amesbury; the A338 linking the A303 with Bournemouth via Salisbury; and the A350 linking the M4 to the north of Chippenham and Poole via Westbury, Warminster, Shaftesbury and Blandford Forum.

The quality of the A-road network varies significantly, with some comprising faster moving, higher capacity dual carriageways with grade separated junctions to slower-moving, lower capacity and in some cases, winding and undulating single carriageway roads. In many situations, the quality and capacity of A-roads could vary from section to section. The A-road network forms the backbone to highway connectivity for much of the Western Gateway STB region.

The motorways and some A-roads including the A36 and A303, are managed by National Highways. The remainder of the road network is managed by local highway authorities.

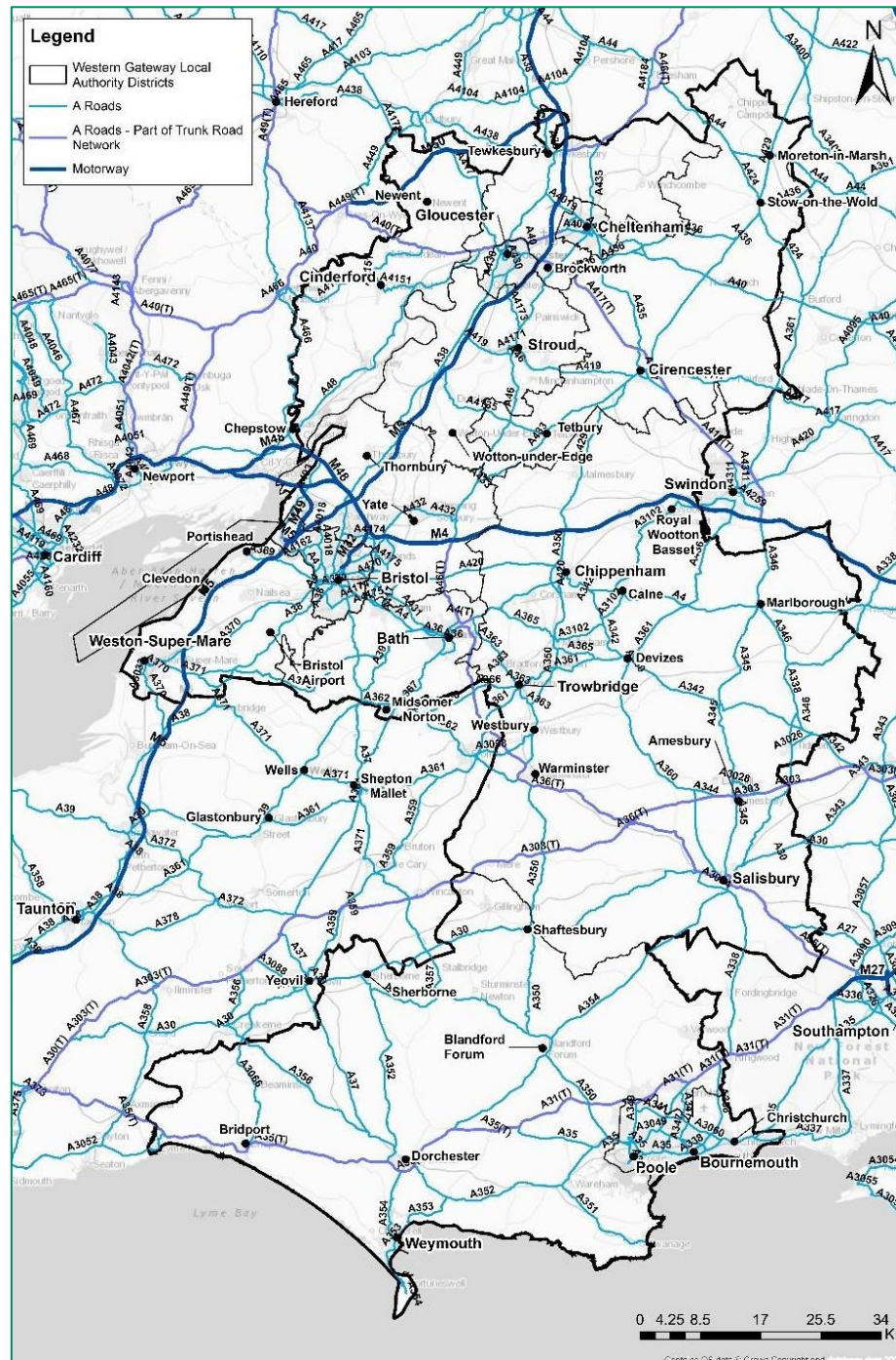


Figure 10 - Western Gateway Main Roads Network

Rail Network

In the context of broader strategic transport connections, the Western Gateway STB area is traversed by several railway routes which are presented in Figure 11.

The main train operators are Great Western Railway (GWR) running services out of London Paddington to destinations in the northern half of the Western Gateway STB region and further west towards Wales and Cornwall. GWR also operates some north-south connections such as the Weymouth to Gloucester and Cardiff to Portsmouth routes.

Bournemouth, Poole, Dorset and Wiltshire are mainly served by South Western Railway, which connects these areas with places including Exeter and Yeovil to the south west and London Waterloo to the north east.

Cross Country Trains also serve the region as part of a longer distance corridor that ultimately crosses the whole of Great Britain linking Plymouth and Cornwall with Scotland. Cross Country also operates services from Bristol to Stansted Airport via Birmingham and Cambridge as well as services between Cardiff and Nottingham.

Transport for Wales services provide connections across the region with regular services from Cardiff to Cheltenham and Gloucester.

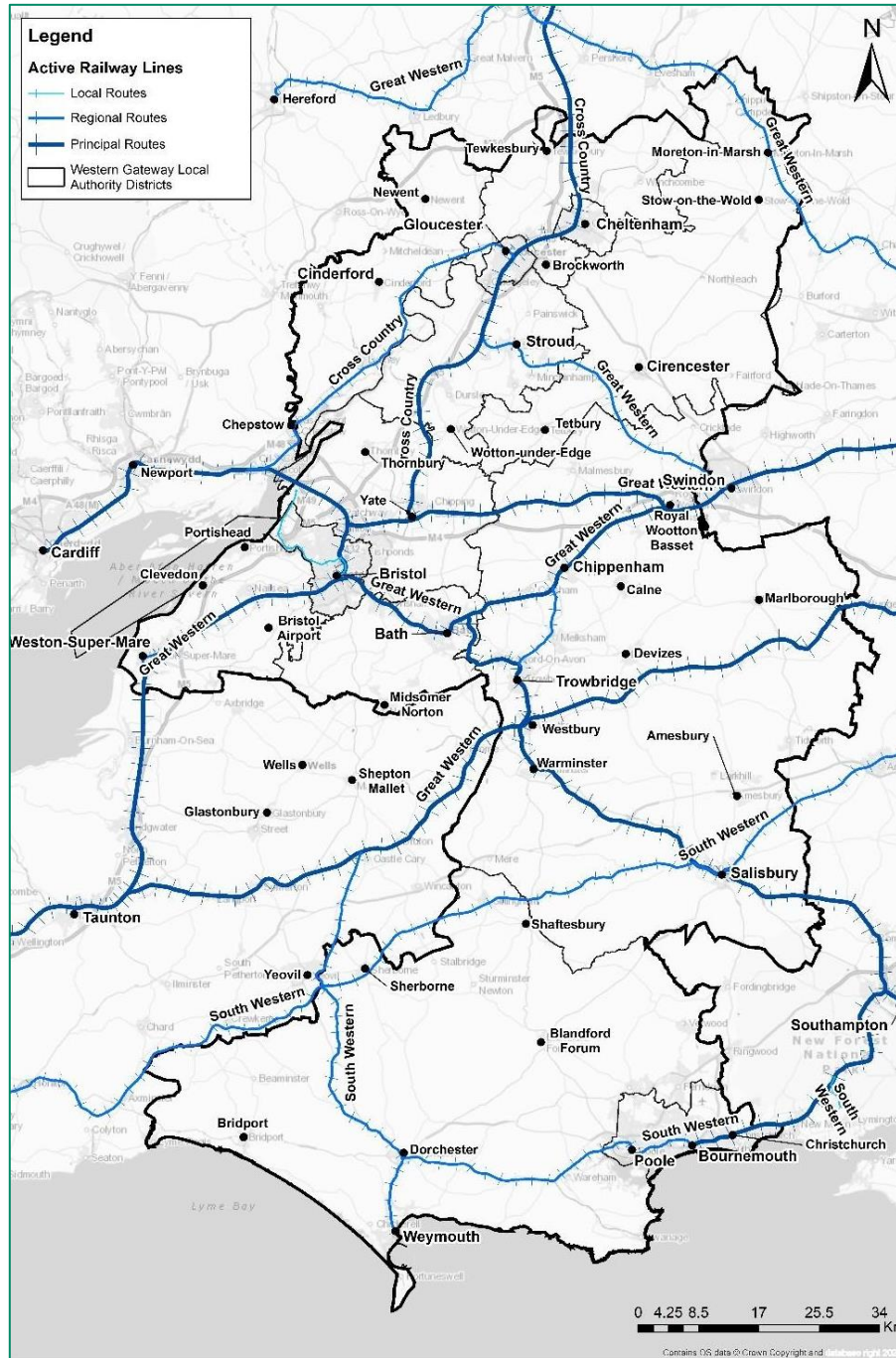


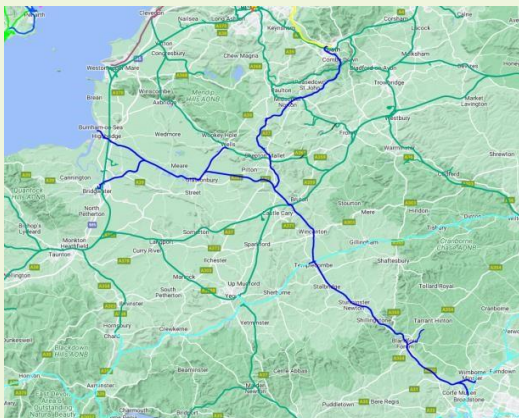
Figure 11 - Railway Network across the Western Gateway

Whilst some rail routes provide higher speed connectivity, most notably the Great Western Main Line, many of the rail routes are slower speed in nature. There are some parts of the Western Gateway area without any railway connections, mainly as a result of the Beeching cuts in the 1960s and an example of this is shown in Box 1 which discusses the closure of the Somerset and Dorset line.

Box 1 - Somerset and Dorset Railway

The Somerset and Dorset Railway (S&D) was created in 1862 and ran from Bath across the Mendips and through Dorset to Bournemouth, with branch lines across the Somerset Levels to Burnham-on-Sea, Bridgwater and Wells. The line's connection at Bath to the Midlands Railway allowed through traffic from the Midlands and North to reach the South Coast via Gloucestershire and this marked a step change in patronage.

Direct services from Bournemouth operated to Burnham, Bristol, Bath, Manchester, Bradford and other northern places in the summer. Right through until 1963 holiday expresses from the north of England used the route to the south coast including the famous Pines Express which ran daily from Manchester to Bournemouth. The line did carry some freight including milk and other farm produce and coal from the Radstock mines. Reflecting the fact that the line was quite undulating with various speed restrictions, the typical journey time from Bath to Bournemouth was two and a half hours. Having said that the road journey over a similar route is also slow.



The line was a victim of the Beeching cuts and closed in March 1966. Replacement bus and coach services were due to be provided, but one coach operator withdrew near to the time of the closure and an emergency rail service was provided for a short period until another operator was found. The Somerset and Dorset Railway had 48 stations and with its closure many towns and communities were left with no station. Some of the replacement coach services such as the Associated Motorways Cheltenham to Bournemouth direct coach service which served Bath and Shepton Mallet

only lasted until the closure of Cheltenham Coach Station in 1984. Many communities are left with little choice other than the private car and a very irregular local bus.

With the railways losing a lot of money there was real pressure on the government to make cuts in the rail network during the 1960s. But many believe this went too far and some lines that played multiple roles for local traffic, long distance passenger and freight were axed including the Somerset and Dorset Railway. Several of the bus and coach services designed to replace the trains on the routes lasted less than 20 years as car ownership grew. The 1960s was the same decade that saw rapid building of the motorway network that would make it easier for people and freight to move across the country. In over 60 years of major road schemes, no motorway has ever been built in Dorset and the county still suffers from poor north-south connectivity. National Highways have in fact been recently considering how to better connect the South Coast to the M4 and further north. In 2022 there are now 33 million cars and over 4 million vans but only 140,000 buses and coaches (just 0.3% of vehicles on the road).

International Gateways

There are two main airports within the Western Gateway STB area. Bristol Airport carries approximately 8.9m passengers per year³⁹. It is the eighth busiest UK airport and the largest in South West England. Over 100 different destinations are served on a scheduled and chartered basis, primarily across Europe and the UK but also the Middle East and North America. The airport has planning consent to handle up to 10m passengers a year and is looking to further expand to handle 12m passengers per year. The long-term vision is to grow the airport so it can handle up to 20m passengers per year. Bristol Airport is served well by buses and coaches including the Falcon coach service which operates between Devon and Bristol via the airport.

Bournemouth Airport is much smaller, having handled 803,307 passengers in 2019, and is served by a few low-cost airlines that connect south Dorset with leisure destinations in Europe. In addition, TUI provides short haul package holidays connecting Bournemouth and the wider region to Spain, Turkey, Greece and Cyprus. Bournemouth Airport is also looking to expand its cargo operations.

There are two main passenger port terminals in the study area, the Ports of Bristol and Poole. The former is mainly a cargo port: in 2019, 8.19 million tonnes of cargo went through the port on the Severn Estuary⁴⁰. Poole Harbour is more passenger-focused: in 2019 it handled 812 tons of cargo and 204,000 passengers⁴¹. From Poole, passengers can board ferries to the Channel Islands as well as to Cherbourg, in France.



Figure 12 - Falcon Coach service operated by Stagecoach via Bristol Airport

³⁹ UK airport data 2019 | Civil Aviation Authority (caa.co.uk)

⁴⁰ Sea passenger statistics: data tables (SPAS) - GOV.UK (www.gov.uk)

⁴¹ Port and domestic waterborne freight statistics: data tables (PORT) - GOV.UK (www.gov.uk)



**The UK and
Western Gateway
STB area Coach
Sector**

6. The UK and Western Gateway STB area Coach Sector

This chapter provides a blended portrait of the coach sector across both national and regional geographies. A blended discussion is necessary because many of the key characteristics of the national coach sector are considered to be indicative of the coach sector within the Western Gateway STB area, or that local/regional data is not obtainable.

A selection of region-specific data has been compiled either to confirm that the Western Gateway STB's coach sector presents a similar picture to the national coach sector, or to provide further insight to the unique features, challenges and opportunities for coaches in the region.

This chapter is structured around the following key topics.

Definition of a coach

- Types of coach services (market segments) and passenger journey purposes
 - Scheduled services operating through the Western Gateway
 - Leisure services including tour operators offering services in the Western Gateway
 - Education
- Passenger Journeys (scheduled services)
 - Travel Patterns
 - Travel Times
 - Travel Costs
 - Service Frequencies
- Types of vehicles used
 - Size of Vehicles
 - Size of Fleets
 - Age of Vehicles

Number and type of coach operators

Coach drivers and employment in the coach sector

Manufacturers of coach vehicles

Licencing

Emissions from coaches

- Innovations: Electric Coaches
- Innovations: Hydrogen Fuel-Cell

Service stops/drop off/parking



Definition of a coach

Coaches can be broadly distinguished by the types of vehicles used and the types of services provided.

Types of vehicles

Buses and coaches are vehicles that can carry 8 or more passengers which therefore also encompass minibuses. At a simple level, coaches and larger buses can be distinguished by several features, as summarised in Table 4.

Table 4 - Distinguishing Coaches and Buses

Coach		<p>A coach is a large motor vehicle used for carrying passengers by road but is designed for longer distance travel, often having a separate luggage hold and passenger facilities such as more comfortable seating (with seat belts), often high backed with headrests, toilets, heating and air conditioning. TV(s) including DVD player, Wi-Fi, refrigerator may also be provided.</p>
Bus		<p>A bus is defined as a large motor vehicle carrying passengers by road, especially one serving the public, on a fixed route and for a fare. Most modern buses are low floor offering step-free access. On-board facilities will include a mix of seating and standing areas with grab handles, and some dedicated space for storage of luggage and buggies etc. Seat belts may or may not be provided.</p>

There is also an important difference in Public Service Vehicle (PSV) licensing definitions between a coach and a bus service. The stipulation for a coach service is that there is a minimum of 15 miles between stops in a straight line. For example, some limited stop interurban services where the vehicle might stop just once in the main villages on route is still classified a bus service as the stops might be around every five miles. Confusingly, this type of service might be operated with a vehicle with coach style seats.

Types of services coaches provide (key market segments and journey purposes)

There are three main 'types' of coach services – scheduled, education and leisure/tourism/private hire and many coach companies offer the whole range of these services although some only operate in one of these markets.

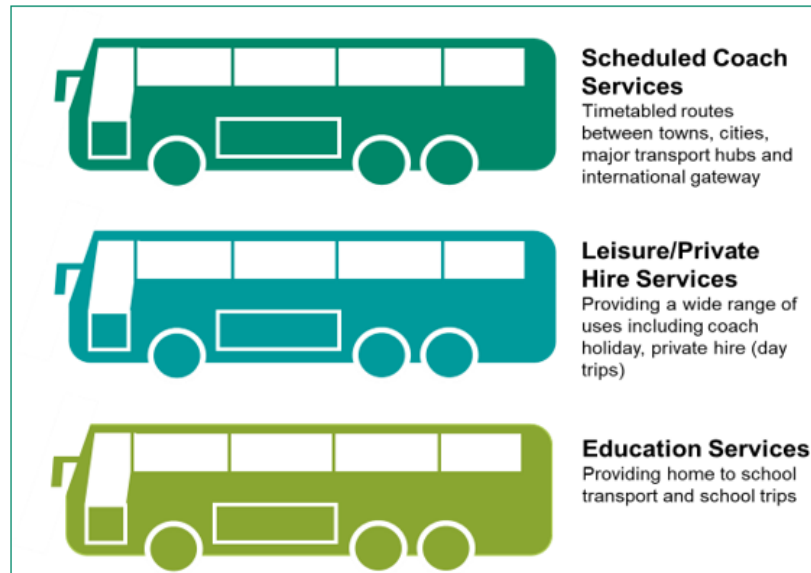


Figure 13 - Main types of Coach Services

The following section describes these main coach service typologies.

Scheduled Services



Scheduled services are regular, timetabled services operating between towns and cities over long distances and offering very limited stops to reduce journey times.

The best-known operator with a good network across the whole country is National Express and the organisation has recently celebrated 50 years of operation.



Figure 14 - National Express coaches at Bournemouth Interchange

The corridor between the South-West of England and London is the most popular and well served in the UK. Big operators like National Express tend to work on a hub and spoke type of business where although customers can go from end-to-end on one coach, say Bristol to London, they can also change at large-scale hubs such as London Victoria Coach Station and Heathrow Airport on to other coaches, thus providing a network of origins and destinations. Given the range of services available, Bristol is the closest to a coach-to-coach interchange in the Western Gateway STB area.

Although these types of coach services were badly affected during the Covid-19 pandemic, they have bounced back since and National Express reported a good period of operations in 2022, not least because of picking up business from the railways as a result of rail industry strike action which saw fewer train services running.

Most of the National Express network is operated as franchises to regional coach operators which have vehicles liveried in the white corporate livery. Indeed, such is the contractual arrangements that if services are operated by a non-liveried vehicle, then penalties are incurred.

There are a number of specific destinations which command high frequent services. This includes places with higher student and youth population and a more elderly demographic and these are key target audiences for the coach industry with hubs such as Bath, Bournemouth and Bristol.

There are some competing scheduled services on core routes offered by the Stagecoach Group, Megabus, and this has built into a national network advertising cheaper fares but this varies on levels of bookings and is similar to the low-cost fares model in the aviation sector.

First also operates some regional coach services but not in a network.

Flixbus, a large German operator with services in many countries has started some routes in the UK in conjunction with regional coach companies. Some vehicles are operating in Flixbus' green livery. Although many of the scheduled services are operated by the big national groups there are some services that are run by local or regional operators. These tend to be limited in number and serve either routes to key destinations such as London or provide niche routes in local areas.

Perhaps surprisingly the revenue earned from scheduled services is only a small proportion of overall coach operations, said to be around 2% by a CPT survey. As such although it is regular work it is not the most important type of business for most regional coach operators. There is a network of scheduled coach services operating across the Western Gateway STB area, predominantly operated by (or on behalf of) National Express. Megabus and Flixbus also serve the region.

Scheduled coach services mainly operate along the major road corridors including motorways and serve the larger urban settlements. East-West connections towards London and Heathrow in the east and South Wales, Devon and Cornwall in the west form the majority of the routes serving the region with just a few south-north services connecting the Western Gateway STB area with Birmingham and the wider North of England. Figure 15, based on information compiled for National Highways and subsequently updated to reflect more recent changes to coach service routes, gives an indication of the routes taken by coaches in the region and where gaps exist.

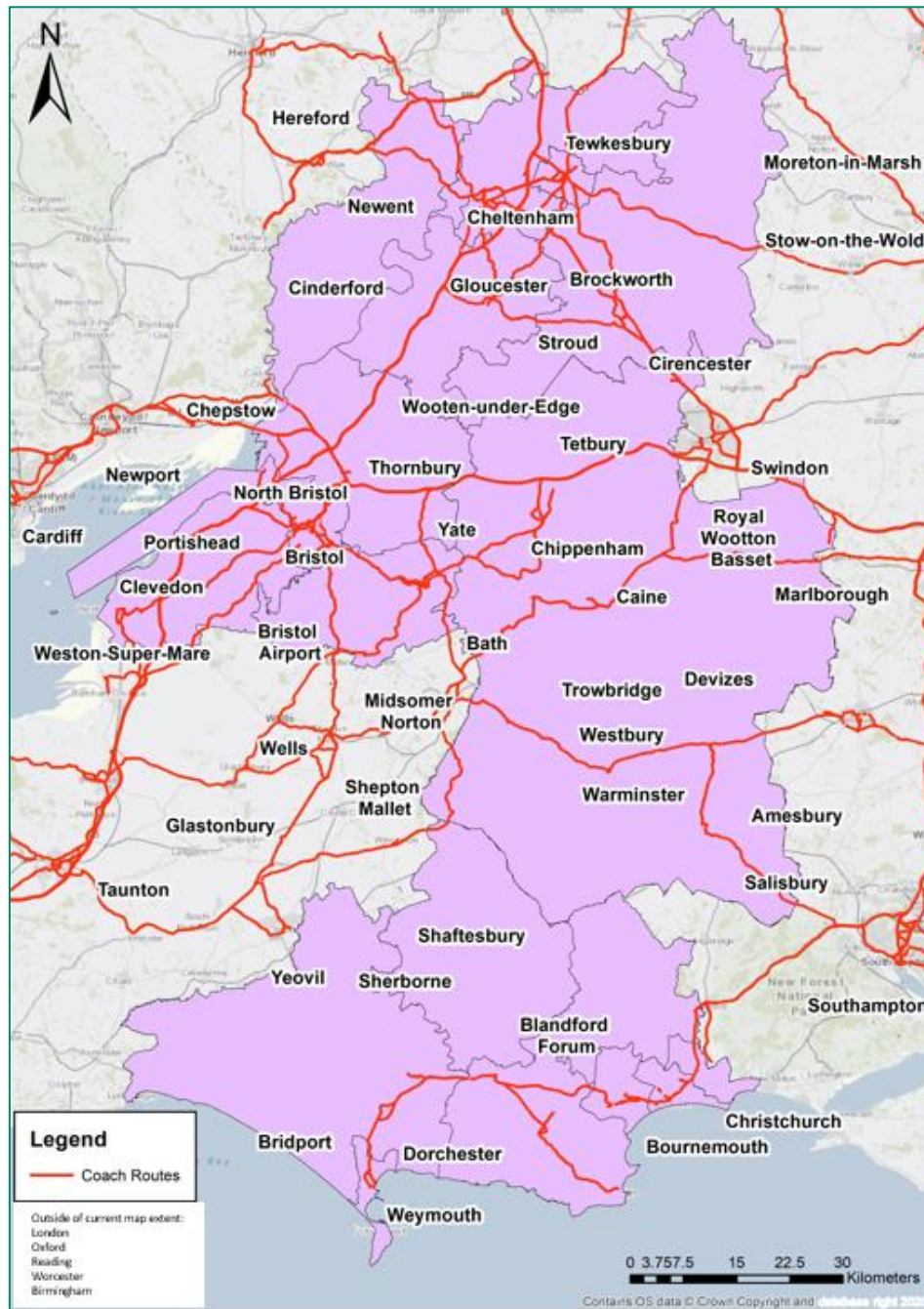


Figure 15 - Coach service routes across the Western Gateway

Other operators running scheduled coach services in the area are Stagecoach, operating the 'Falcon' service between Bristol and Plymouth via Bristol Airport, Exeter and Taunton. As well as Berry's Coaches, which runs the 'Superfast Services' between Somerset and London Hammersmith. Superfast 3 calls in a small number of Wiltshire towns (Warminster, Codford and Amesbury).

A list of all scheduled coach services operating into/out of and through the Western Gateway STB area, compiled during Summer 2022 from online timetables, is contained in Appendix B. Some highlighted routes are presented in the table below and differentiates between two broad directions of travel – north-south and east-west.

Table 5 - A sample of key scheduled coach services operating across the Western Gateway

	Services include	Places Served include	Key roads used include
Running East West	National Express Route 32, 35, 40, 201, 202, 204, 205, 401/403, 444, 445, Berrys Coaches Superfast 3, Megabus routes M3, M10	Weymouth, Dorchester, Bournemouth, Swanage, Corfe Castle, Wareham, Poole, Bournemouth University, Weston Super-Mare, Bristol, Bath Trowbridge, Melksham, Sells Green, Devizes, Gloucester, Stroud, Cheltenham, Cirencester	M3, M4, A31, A35, A303, A361, A4361, A40
Running North South	National Express Route 100, 101, 102, 104, 160, Megabus route M34, Stagecoach Falcon	Weston-Super-Mare, Bristol, Cheltenham, Bournemouth, Bristol, Bristol Airport, Bath	M5, A354, A338, A34

Figure 16 (overleaf) shows connectivity by coach across the region.

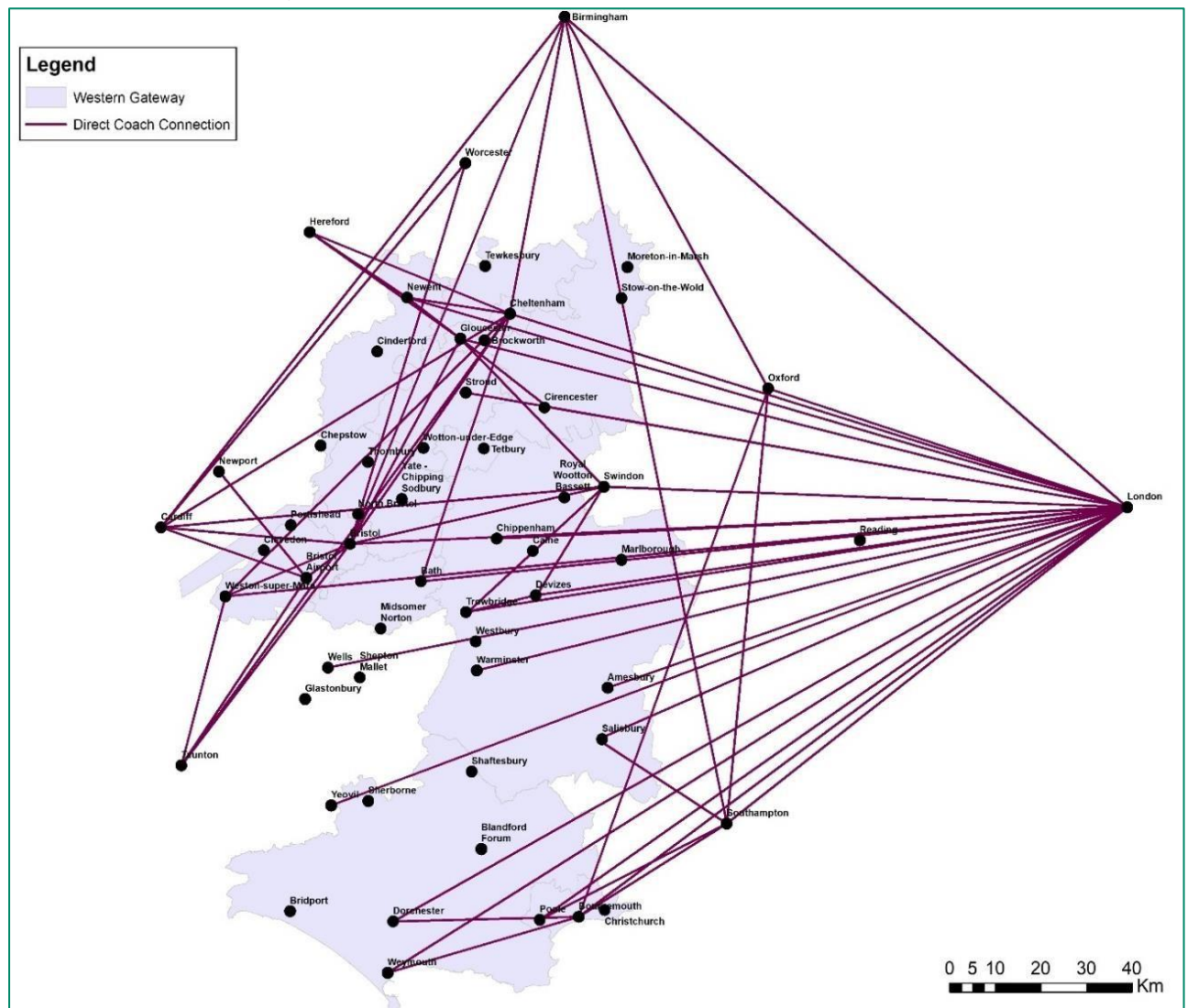


Figure 16 - Direct Coach Connections

It is clear from the image above that most services are intended to connect the region with London as most routes terminate in the capital. Another corridor with a significant concentration of routes is the north-east to south-west corridor which cuts through the western part of the study area, generally along the M5 corridor between Birmingham and the South West. As a result, services tend to funnel through and congregate in a few select urban centres, with Bristol and Cheltenham being the most significant within the Western Gateway STB area.

The map shows that there are fewer or no coach service connections linking the southern and the northern parts of the STB area. For instance, the only direct connection between the Dorset area and any of the selected settlements north of London, is the one between Bournemouth and Oxford, a link provided by National Express route 160 from Bournemouth to Birmingham.

Another observation is that Bristol Airport public transport connectivity is to Bristol city centre and southwards towards Plymouth (via the Falcon service). Destinations to the north of Bristol are therefore not directly connected by coach to the airport therefore people travelling by public transport from places like Gloucester, Stroud, Yate, Cheltenham and Tewkesbury would need to route via Bristol city centre.

As a comparison, Figure 17 shows rail connectivity across the region. This shows that there are stronger north-south connections than coach, although the smaller settlement of Weymouth is favoured as a southern terminus over the larger conurbation of Bournemouth- Poole- Christchurch. A strategic gap therefore appears to exist across both coach and rail networks between this conurbation and the central and northern parts of the region.

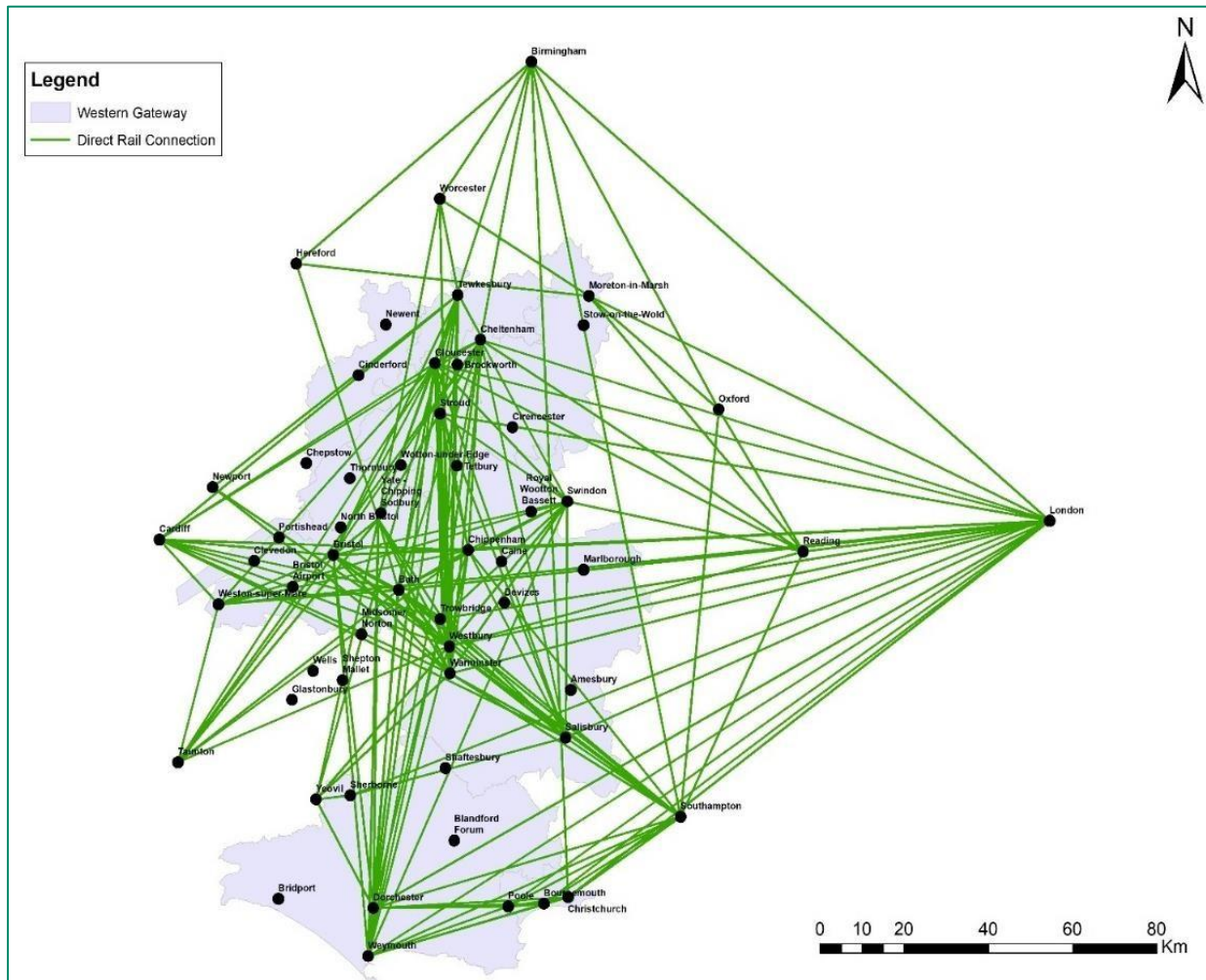


Figure 17 - Direct Rail Connections

To add another dimension, Figure 18 shows inter-urban bus routes connecting key settlements in the STB area. Whilst these may fill some small gaps, these do not entirely fill the strategic gaps highlighted in this section.

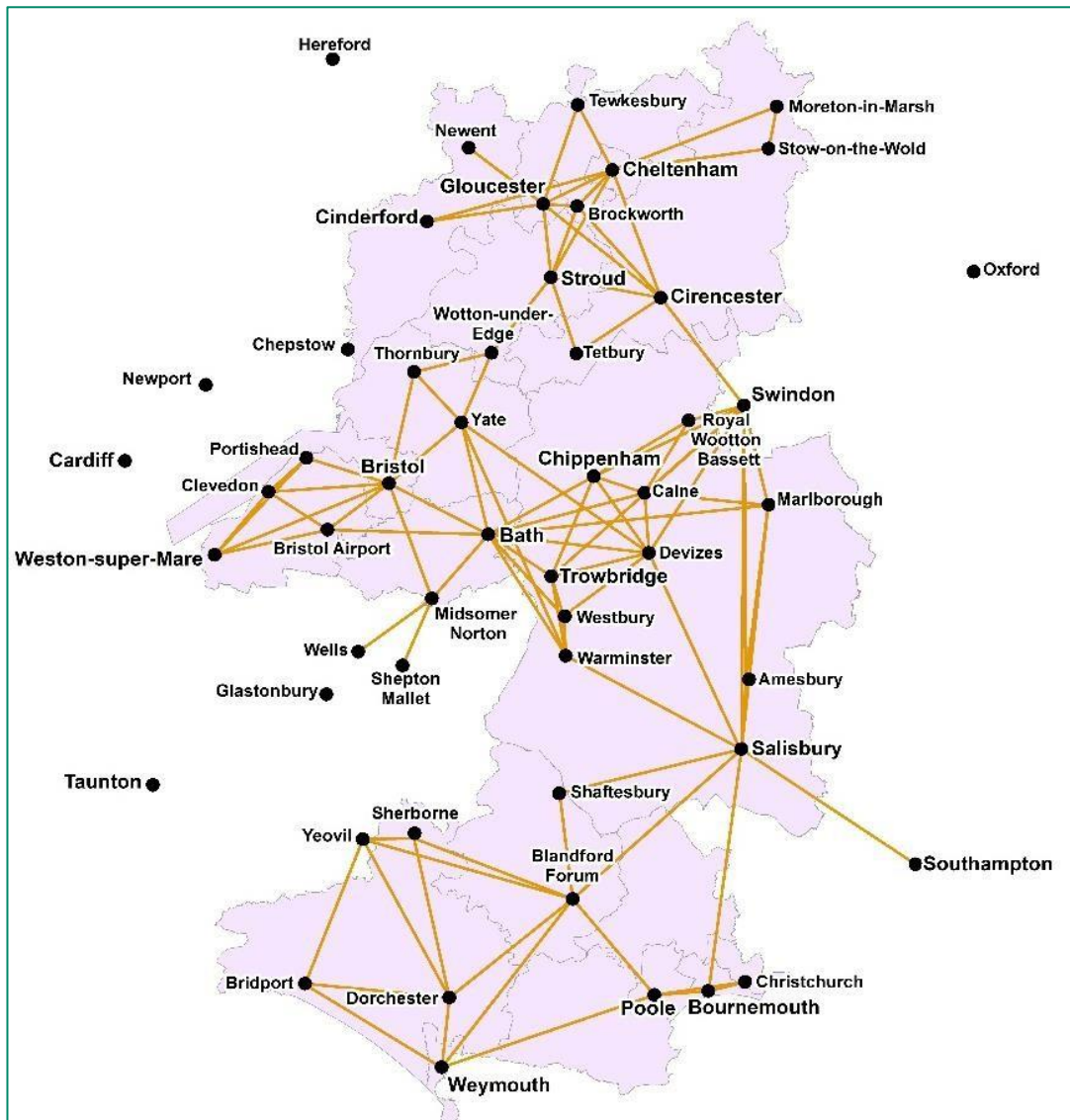


Figure 18 - Direct Inter-Urban Bus Routes between key settlements

Scheduled coach services by no means provide a turn-up-and-go type of service, with the majority of direct coach service connections running at most with a headway of 1-2 hours but more typically services running every 2+ hours. The most frequent coach-based services include the Stagecoach Falcon service operating via Bristol Airport and Bristol City Centre.

Scheduled coach services may incorporate a period of time at certain larger stops for drivers to take a short break. The length of stop can vary, and this tends to occur at larger interchanges like Bristol Coach Station, where a coach service could stop for up to 30 minutes before resuming its journey. At most stops, sufficient time to allow passengers with luggage to board is allowed for in timetables, and this will be longer than a local bus service.

Scheduled coach services have existed for over 100 years offering long distance connectivity. The following cases studies provide some history of two well-known coach operations in the Western Gateway area, Royal Blue and Associated Motorways.

Box 2 – Royal Blue Coaches

Possibly one of the best known coach companies operating scheduled services and excursions across the South West in the 20th Century was Royal Blue.

Founded in the horse drawn era of wagonettes and stagecoaches, Thomas Elliott obtained his hackney-carriage driver's licence in September 1880 and established his business in Bournemouth. The business expanded rapidly and Royal Blue gained a reputation for attention to detail and the turnout of its coaches and teams of horses

Royal Blue converted from horse drawn carriages to motorised char-a-bancs before the First World War and was a pioneer in the development of long distance express services to London and many other places in competition with the railways. But importantly the coaches also linked towns and villages which didn't have direct rail services.

The business was eventually sold, on 1 January 1935, to Thomas Tilling Ltd and merged with the express services of subsidiaries Western and Southern National who continued to use the Royal Blue name.

At its peak Royal Blue operated around 100 vehicles of which around 33 coaches were allocated to the Bournemouth depot where the main workshop and facilities were. The Tilling Group was nationalised in 1948 and formed a major constituent of the National Bus Company in 1969.

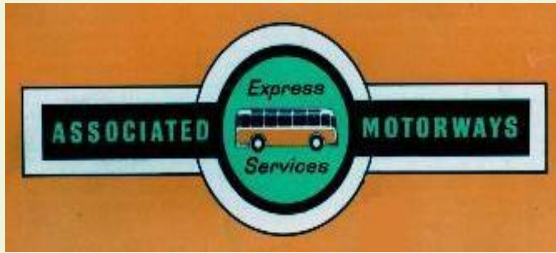
Royal Blue routes were absorbed into the National Express Network in the 1970s but the Royal Blue name continued to be used on Western and Southern National coaches even after de-nationalisation, the final Royal Blue liveried vehicle being withdrawn in 1994.



Royal Blue was successful because it operated quality vehicles with plenty of legroom, had a strong local and regional identity reinforced by the colour scheme of the vehicles, had a good interconnecting network, was reliable and offered good value for money.

Box 3 - Associated Motorways

In order to provide a better-connected service for customers, Royal Blue teamed up with five other coach companies to operate services under the brand of Associated Motorways. It was formed as a result of the Road Traffic Act 1930, which encouraged competing coach operators to co-ordinate their services. In 1934, the six coach operators pooled their services between the Midlands and London to the south and west of England: Black & White Motorways of Cheltenham, Red & White of Chepstow, Royal Blue, Greyhound (by then owned by Bristol Tramways), Midland Red and United Counties of Northampton.



Associated Motorways did not own or operate any coaches. Each member company committed itself to providing an agreed mileage of coach journeys for Associated Motorways and took an agreed share of the profits. The pool mainly operated the hub and spoke model, the hub being Cheltenham where Black & White had opened a new coach

station in 1931. All of the members except Black & White also operated their own coach services outside the consortium.

At a peak summer weekend the consortium could have over 800 coaches on the road. Every day, coaches from all over England and Wales converged on Cheltenham, where most passengers changed coaches to continue their journey. At 14:00 sharp an inspector blew his whistle, and the coaches departed en masse.

Two things contributed to the demise of Associated Motorways. One was the spread of the motorway network. Although motorways were good for coach services generally, they made Associated Motorways' hub and spoke model uncompetitive and obsolete. The other was the government's desire to rebrand and rationalise the coach services under its control.

All of the members became subsidiaries of the state-owned National Bus Company in 1969. In 1973 the National Bus Company formed National Travel (later National Express) to run coach services, and all Associated Motorways' services were transferred to National Express in 1974.

National Express was a marketing operation which relied mostly on coaches supplied by other companies. But unlike Associated Motorways, National Express imposed its own National brand on the operating companies' coaches. The Cheltenham coach station closed in 1984.

The closure of the Cheltenham coach station has meant that coach travellers from the North West to the South West usually have to change at Victoria Coach Station in London. This can be problematic for three reasons, traffic congestion in the London area can be much worse than other parts of the country, the distance travelled can be much longer as passengers travel east to come back west again and if the interchange is very busy it can be daunting to the elderly and those not used to it.

Coordinating coach services to provide a regional and national network is positive, so in many ways establishing National Express was a good thing. However, losing a regional identity, customer service and therefore brand loyalty is not. Losing regional

interchange hubs and relying on Victoria Coach Station in London has some disadvantages as well as connectivity advantages. There is a need to consider who the customer base is and meet their requirements. The elderly and people who are mobility impaired, people who are unable to drive and students who cannot afford a car are part of the obvious target audience. Each group has different requirements such as convenience, ease of use, understandable messaging whereas students mainly require cheap services.

Tourism / Leisure / Private Hire



The tourism/leisure/private hire sector is very important for most coach companies. It can be divided up into three sub-sectors:

- Package Holidays;
- Excursions; and
- Private Hire.

Package Holidays (L1)

The Western Gateway STB area has a number of important destinations as a key location for package holidays. Key trip attractors include Bournemouth, Weymouth, the Cotswolds, Bath and Stonehenge.

As an example, many large hotels in Bournemouth have parking areas in their grounds, dedicated for coaches to be parked overnight. This allows holiday makers easy access to the vehicle after breakfast for the day's excursion.

Coach companies from all over the UK book multiple rooms at these hotels as part of a package which includes the journey to and from the seaside resort and several day trips.

The driver is a tour guide in their own right, usually staying at the same hotel. On certain package holidays the driver will be accompanied by a travel guide as well. CPT featured a case study of a typical coach company operating in this sector. It ran 200 tours around the UK and Ireland carrying just over 4,700 passengers in a year. This is an average of around 24 guests per tour. Tours last an average of five days and four nights, contributing considerable income to the domestic tourist economy. A door-to-door pick up service on these tours assists elderly passengers that would otherwise feel unable to travel and helps to tackle social isolation. The operator also offers a reunion trip which allows passengers to meet up with the friends they made on previous holidays.

Excursions (L2)

Many coach companies offer a range of day trip excursions to interesting destinations and these tend to include:

- Stately Houses and Gardens including those owned or managed by the National Trust and English Heritage;
- Historic Spa towns and cities such as Bath, Salisbury and Cheltenham;
- Picturesque small towns and villages including Bourton-on-the-Water, Stow-on-the-Wold and Shaftesbury;

- Interesting larger cathedral cities some with historic docks such as Bristol and Gloucester;
- Seaside Resorts such as Bournemouth, Swanage, Weymouth and Weston super Mare;
- Theme parks and safari parks such as Longleat; and
- Historic monuments, castles and natural features such as Stonehenge, Corfe Castle and (located just outside of the Western Gateway STB area) Cheddar Gorge and Wookey Hole.

Table 6 - Example Coach Tour operator services in the Western Gateway

Operator	Base	Pick Up Locations	Locations Served in the Western Gateway
Golden Tours	London	London	Bath, Stonehenge, Salisbury, Lacock Abbey
National Holidays	Operates Nationally	pick-up points across North East, North West and the Midlands	Bath, Weston-super-Mare, Bournemouth, Dorchester, Weymouth, Poole
Just Go Holidays	Operates Nationally	pick-up points across England	Bournemouth, Weymouth, Cheltenham Racecourse, Tewkesbury, Bourton-on-the-Water, Stow-on-the-Wold, Broadway, Swanage, Jurassic Coast
Acklams Coaches	Beverley, East Yorkshire	Various locations in the North East and Yorkshire	Weston-super-Mare, Bath, Salisbury, Bournemouth, Poole, Weymouth, Cheltenham Racecourse
Alfa Travel	Operates Nationally	Across England	Bath, Bristol, Weston-super-Mare
Caledonian Travel	Glasgow and Leeds	Various locations in Scotland, the North East and Yorkshire	Bournemouth, Weymouth, Bath
Shearings	Operates Nationally	pick-up points across England	Bournemouth, Salisbury, Bath, Weston-super-Mare, Bristol
Woods Travel	Bognor Regis, West Sussex	area around West Sussex (Fareham-Guildford, Eastbourne triangle)	Bournemouth, Weymouth, Bristol, Bath, Moreton-in-Marsh, Cheltenham, Broadway, Devizes
Andrews of Tideswell	Tideswell, Buxton, Derbyshire.	Pick-up area includes Sheffield, Chesterfield, Glossop, Matlock and surrounding areas.	Bath, Bournemouth, Salisbury
Cooks Coaches	Southend-on-Sea, Essex	Pick up points in South-East Essex and East London	Bournemouth, Poole, Swanage, Weymouth, Sherborne, Shaftesbury, Swanage, Chippenham, Lacock Abbey, Bath, Salisbury, Bradford on Avon, Weston-super-Mare, Bristol, Christchurch

Operator	Base	Pick Up Locations	Locations Served in the Western Gateway
Johnsons Coaches	Henley in Arden, Warwickshire	Home pick up available throughout the Midlands, at a surcharge if outside core area (S Gloucester - W Kidderminster, N North of Birmingham Metro, E Rugby/Banbury)	Weymouth, Poole, Bournemouth, Gloucester, Cheltenham, Stow-on-the-Wold, Jurassic Coast
Global Coach Tours	London	London	Stonehenge, Bath
Daish's	Operates Nationally	Pick up points across England	Bournemouth, Weymouth, Poole
Harry Shaw	Coventry	Pick up in several West Midlands locations	Bournemouth, Weston-super-Mare, Weymouth
Harmony Coach Holidays	Hamilton, Scotland.	Pick ups in Central Scotland and North East England.	Bournemouth, Weston-super-Mare, Weymouth, Bourton-on-the-Water, Poole, Jurassic Coast, Swanage
Kirbys Coaches	Rayleigh, Essex.	Across Essex and East London	Bournemouth, Poole, Marlborough, Bristol, Bath

Private Hires (L3) Private hires include a range of different applications including one-off bookings by an individual for a special occasion such as a birthday party or a wedding to a works outing. It can include bookings to a concert or sporting events such as Cheltenham races or football, rugby and cricket. Private hire work includes taking the local football team, staff and supporters to all their away matches, and carrying out useful community services. Importantly the use of coaches takes cars off the road, thereby reducing congestion and emissions.

Private charter coaches also travel to the region direct from the continent arriving through Dover as the UK's main Ro-Ro port and travelling via London or destinations along the South Coast.

This category of coach also includes rail replacement services. Without a coach operator ready to fill these replacements, there may be upwards of 100 passengers stranded at a station at any one time. This work is typically at a weekend when Network Rail is undertaking engineering work. Some operators are often involved in 'call off' contracts in which they are called upon by rail operators during periods of engineering work and disruption. This can be useful to coach operators as many of the vehicles are predominantly used on weekdays on educational work and hence this provides a revenue stream for 7 days a week.

This category includes charter by an airport or airline to cover a flight that has been diverted for a variety of reasons. This sometimes is at very little notice and shows the important flexibility that many coach companies offer.

Education



Education services is one of the most important types of work for coach companies as it is regular work spread throughout the year except in school holidays when most of the work stops. So typically the coaches could be spare for 13 weeks of the year but operators try to deploy the vehicles on private hire or summer holiday trips to gain extra revenue where possible.

The work includes journeys to/from school often organised by the education department or the school concerned on a tendered basis for a year or perhaps more. These normally pickup at bus stops on agreed routes to the school.

Most services are not available for use by the general public although this is not always the case. The work requires good time keeping and well-trained drivers that are able to deal with a variety of issues that occur when transporting unaccompanied children. Many coach drivers have to complete DBS (Disclosure and Barring Service) checks for safeguarding reasons before being used particularly on schools work. Other educational bookings include taking groups of children on day excursions and trips to the swimming baths and other sporting events.

Around 40% of the coaches in use are associated with educational bookings but it tends to be local, low mileage work that is tightly priced and hence only represents about 20% of the mileage covered and revenue earned. On the positive side it is regular work that can be built into business and staffing plans. Only home to school and rail/aviation replacement services continued to operate, with associated payment at any meaningful level, during the Covid pandemic when other coach bookings ceased.

An example of a schools coach operator was featured by CPT in its strategy. It had 31 coaches which travelled around 600,000 kms in 2019, meaning on average each vehicle moved just less than 20,000 kms per annum each. This is a lower annual mileage than other coach applications.

As noted earlier, many regional coach operators will provide a mixture of services including home-to-school transport and private hire. Contained in Box 4 below is a case study for Bennetts Coaches based in Gloucester, and highlights some of the challenges they are facing.

Box 3 – Bennetts Coaches

Bennetts Coaches are a third-generation family business that started in 1962 and are based in Gloucester. Bennetts offer a range of coach services including: airport/station transfers; corporate hire; day trips and excursions; European tours; holidays/day trips; home to school transport; private hire; scheduled coach services; schools/colleges and groups; UK tours; and shuttle buses.

Fleets and Operations

In recent years, Bennetts have invested heavily into ensuring their fleet is PSVAR compliant, ensuring each vehicle is maintained every 6 months. As a result, the fleet is comprised of modern vehicles which have an average age of 4 years old. The majority of which are Euro 6 compliant vehicles with a small number of Euro 5 vehicles used for school services. Bennetts operate a number of National Express services, departing from Gloucester, Stroud and Coventry. As well as operating Park and Ride services using two coaches which operate every 20 minutes.



Electric Coach Trial

In 2022, Bennetts trialled an electric Yutong coach which received positive feedback from both drivers and passengers for its comfortable seating and quiet engine. The vehicle was said to be ideal for school and shuttle services but would not be suitable for airport transfers or holiday tours due to the lack of luggage space. However, the electricity costs extremely high, increasing from 19p to £1.10 per unit kw/hour. Coupled with the initial purchase cost of £380k, Bennetts decided not to purchase the vehicle.

During the stakeholder meeting, Bennetts outlined the key issues facing the coach sector, which included: ageing workforce; poor perception of the industry; lack of parking facilities; complying with PSVAR legislation; and BODS technology.

In the face of significant challenges, Bennetts' investment into a modern fleet of coaches has enabled them to provide varied services across the Western Gateway and beyond. Their involvement in electric coach trials has highlighted significant challenges that would face most coach operators whose vehicles need to be used for a wide variety of trip purposes.

Passenger Journeys

Figure 19 provides some key statistics on the passenger usage of coaches across the UK (CPT, 2019).

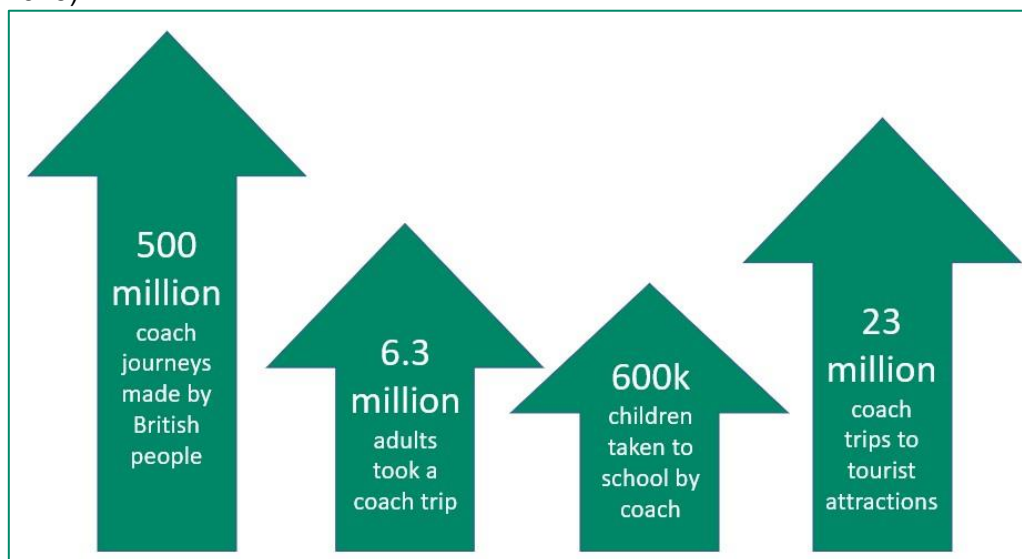


Figure 19 - UK coach sector statistics (2019), Backing Britain's Coaches, CPT

CPT also provide statistics at a national level on the percentage of coach fleet revenue by coach service type/journey purpose. These categories of journey purposes have been allocated to the three main coach service types considered in this Coach Strategy. The pie chart clearly shows that scheduled services represent only a small proportion of overall revenue.

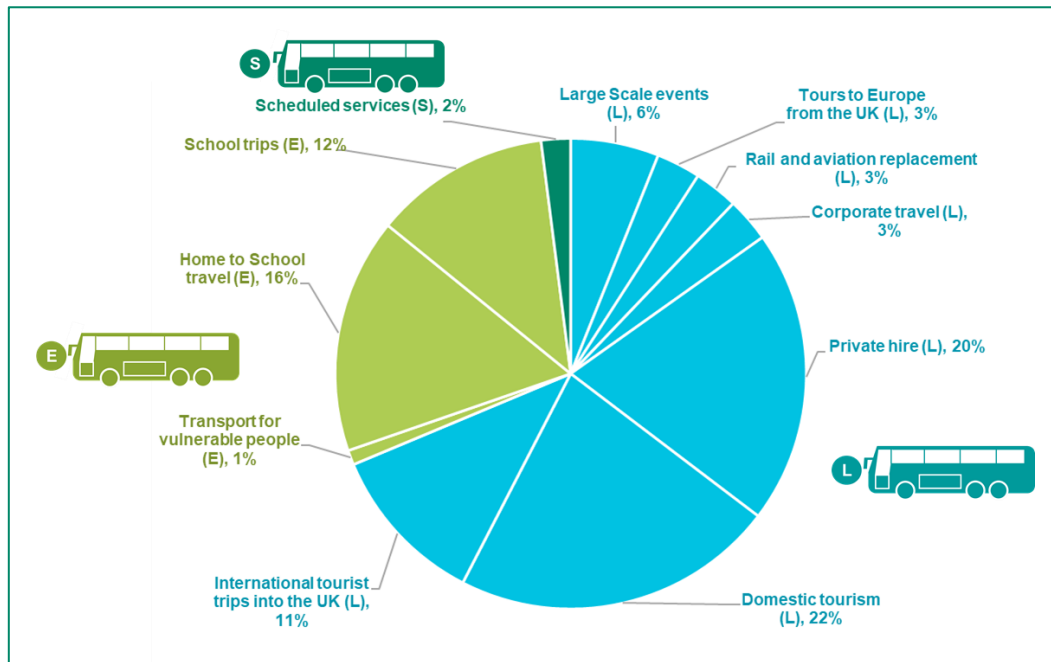


Figure 20 - Percentage of Coach Fleet Revenue (CPT 2020)

Equivalent data for the Western Gateway is not available, however it is unlikely to differ significantly from this national picture and given the significance of the tourism and leisure sector in the region, the Leisure/Private Hour (L) category could represent an even larger proportion of revenue.

Insight into coach travel in the UK is also captured as part of the National Travel Survey⁴² which offers many interesting statistics on the demographics and purpose of trips by different modes. Coaches are included within the category of 'non-local buses'. NTS also provides some data at a regional level so it is possible to understand how the coach market in the south west could be similar or different from other regions. The NTS data shows that:

- Leisure is the purpose for which English people travel the most miles on non-local buses; but even in this case, compared to rail, miles per person per year on non-local buses are significantly less;
- The percentage of people using non-local buses regularly (more than twice a year) has remained stable since 2003 while the percentage of people taking a non-local bus once or twice a year has declined;
- The age groups with highest levels of non-local bus usage are 17-20 and over 60s;
- In the South West region bus journeys are on average shorter than in other parts of England while rail journeys are longer;
- South west residents travel less by rail than people from other regions. Walking, cycling and local bus figures are in line with the bus while miles travelled driving a car are above the national average but similar to other regions excluding London; and
- In 2021, less than 1% of trips over 250 miles in England were made by non-local bus, while coach and bus modal share for trips under 250 miles decreased only slightly from pre-Covid levels.

⁴² [Ad-hoc National Travel Survey analysis \(www.gov.uk\)](https://www.gov.uk/government/statistics/ad-hoc-national-travel-survey-analysis)

Travel patterns

As noted earlier, there are many urban centres attracting trips from across the region and beyond. Key settlements in the Western Gateway STB area have been assessed based on the presence and density of key trip attractors used by coach passengers, including Higher Education institutions; leisure/tourism attractions, employment and international gateways.

The larger cities unsurprisingly host higher concentrations of key trip attractors for all types of passengers. Bristol, Bath and Bournemouth have the most significant concentrations and are estimated to generate the most coach travel demand. It is important therefore that locations with higher and/or significant concentrations of trip attractors feature along scheduled coach service routes, and that sufficient facilities including drop-off and parking are provided which are proportionate to the level of passenger demand.

Table 7 - Concentration of trip attractors by settlement in the Western Gateway

Concentration of trip attractors	Settlements
Significant concentrations E.g. regionally-significant clusters of key trip attractors across all sectors including leisure (including retail and tourist attractions), higher education institutions, international hubs and employment)	Bristol, Bath, Bournemouth
Higher concentrations E.g. regionally-important clusters of key trip attractors across more sectors including leisure (including retail and tourist attractions), higher education institutions, international hubs and employment)	Arle Court, Bristol Airport, Cheltenham, Poole, Salisbury, Gloucester, Dorchester
Moderate concentrations E.g. locally-important clusters of some key trip attractors including leisure (including retail and tourist attractions), higher education institutions and employment)	Weston-super-Mare, Stroud, Cirencester, Tewksbury, Weymouth, Trowbridge, Amesbury, Chippenham, Brockworth, Royal Wootton Bassett, Yate-Chipping Sodbury
Lower concentrations E.g. the presence of some or limited key trip attractors including leisure (including retail and tourist attractions), higher education institutions and employment)	Cam, Filton, Christchurch, Bridport, Devizes, Shaftesbury, Blandford Forum, Clevedon, Marlborough, Cinderford, Frome, Warminster, Calne, Malmesbury, Melksham, Midsomer Norton, Moreton-in-Marsh, Newent, Portishead, Sherborne, Stow-on-the-Wold/ Bourton-on-the-Water, Tetbury, Thornbury, Westbury, Wootton under-Edge

National Highways' South West Regional Transport Model (SWRTM) provides estimates for base year and forecast year traffic movements across the Western Gateway STB area.

The model's simulation network includes all the motorways and A roads managed by National Highways, in addition to other A and B roads and some local roads considered

either to have a significant role in allowing traffic to access Strategic Road Network or capture local traffic routing.

Mobile phone data forms the backbone of the model's trip matrices so should provide a robust basis for assessing where people are currently travelling to/from. Car traffic demand from the model can be used as a proxy for assessing potential coach travel demand and the potential for modal shift, where there is high travel demand between settlements where there is poor public transport connectivity.

Appendix E provides full details of travel demand between settlements across the Western Gateway STB area and also presents whether or not there is public transport provision.

There are key movements between settlements which generate very high levels of travel demand and these tend to be to/from larger settlements such as Bristol, Bath and Bournemouth. More often than not, the higher levels of travel demand tend to coincide with where there is public transport mode availability between settlements, and where travel distances are shorter, for example Bristol-Bath, Cheltenham-Gloucester and Bournemouth-Poole.

However, there are some interesting exceptions, including for example between Stroud-Bristol, Poole-Shaftesbury, Shaftesbury-Warminster, Cirencester-Royal Wootton Bassett, Gloucester-Weston-Super-Mare and Thornbury-Gloucester.

It is worth highlighting that this analysis does not account for local bus services that may be in operation and this will be particularly relevant to the smaller settlements and closely spaced settlements which may be highlighted in these tables as having neither a rail or coach connection.

The Midlands to South Coast multi modal corridor particularly stands out in terms of there being notable car travel demand between certain settlements which are not directly connected by public transport. When referring back to the coach connectivity plot in Figure 16 and the data contained in Appendices B-F, there can be observed some clear gaps in north-south coach service provision which could represent opportunities for additional coach services, these being:

- Bournemouth/Poole/Christchurch to Bath and Bristol via Shaftesbury (broadly along the A350 and A36 corridors);
- Gloucester-Stroud-Thornbury-Bristol (via the A38); and
- Cheltenham-Bath-Bournemouth/Poole/Christchurch (potentially via Cirencester, Chippenham and Shaftesbury along the A417, A429 and A350).

Travel Costs

With reference to data which has been compiled for this strategy and summarised in Appendix F, Coach can often be significantly cheaper than rail, as is demonstrated in the data which has been compiled for this strategy in Appendix F. Coach is the cheapest public transport mode between 53 out of 78 pairs of settlements in the Western Gateway based on weekday fares.

The average percentage difference in fare between rail and coach is around 79% or around £13. Coach fares are approximately 14p per mile compared to 33p per mile for train. Some of the larger differences between rail and coach fares occur over longer distance routes, for example there is a fare difference of around £99 (81p per mile) between Bournemouth and Birmingham and £22 between Bristol and London.

On a per mile basis, some shorter distance routes are highlighted, for example a difference of 49p per mile between Weymouth and Bournemouth and 37p between Bristol and Swindon. For shorter journey lengths within the Western Gateway, the differences are unsurprisingly smaller, between 4p and 49p per mile and an average of 18p per mile (there is an average distance of 29 miles and a maximum 38 miles travelled by a scheduled coach service between two settlements within the STB area).

By offering cheap fares, scheduled coaches attract more price-sensitive customers including young adults/students as well as older generations. Like the national rail network, National Express offer discounts for certain groups of passengers. They offer the following Coachcards:

- Senior Coachcard - For those 60 years or over.
- Young Persons Coachcard - For those who are between 16 and 26 years old.
- Disabled Coachcard - For anyone who has a disability.

Megabus offer very cheap fares but fewer discount options, except notably the TOTUM discount for students which is managed by the National Union of Students.

Linking back to Table 7 (key trip attractors) and to the discussion on higher education establishments located across the Western Gateway STB, there are important destination markets that scheduled coaches should serve, these being in particular Bristol, Bath, Gloucester and Bournemouth.

Each of these settlements benefit from coach connections in particularly to places outside of the Western Gateway STB area including major hubs like Heathrow Airport, London and Birmingham.

With the student market in mind however, connectivity across the STB area to/from the main higher education bases is not as good, in particular north-south connections to Bournemouth. As highlighted earlier, north-south rail connectivity is also poor between Bournemouth, Bath, Bristol, Cheltenham and Gloucester.

Travel Times

With reference to data which has been compiled for this strategy and summarised in Appendix F, Coach is less competitive to rail in terms of travel times. Out of 78 pairs of settlements in the Western Gateway and key external destinations where both direct coach and direct rail services are available, rail is the quickest mode in all instances.

Coaches on average take 46 minutes longer than trains however the differences vary significantly, with the largest difference occurring between Salisbury and London where the journey by train is almost 2 hours quicker than by coach.

Based on online journey planning tools, out of journeys between 449 settlement pairs including those both inside and outside the Western Gateway, the train is the quickest mode for 51% of journeys compared to 49% for car. When looking at settlement pairs within the Western Gateway only, the car is the quickest mode for 89% of journeys.

Where both coach and rail services are available between settlements both contained within the Western Gateway, they tend to be fairly evenly matched in terms of journey times, for example between Bristol, Gloucester and Cheltenham, although a notable exception is Bournemouth and Weymouth (which has also been highlighted in terms of the fares difference).

Service frequencies

With reference to data which has been compiled for this strategy and summarised in Appendix F, Coaches do not run as frequently as rail services and therefore do not provide the 'turn-up-and-go' service in particular for people who choose to travel at the last minute as opposed to plan and book a trip in advance.

For coach services operating within the Western Gateway, they tend to operate twice to eight times a day, although frequencies could vary by weekday. Frequencies could be reduced on some routes at weekends.

The most frequently served corridor for services operating between settlements both within the STB area is between Bristol and Gloucester and Bristol and Cheltenham. For these corridors, the journey time difference between train and coach is less significant at around 5% and the cost per mile difference is also small at around 4p.

When taking into account external destinations, the broad Bristol-London corridor is the most frequently served by coaches if services via Bath, Chippenham and Swindon are included.

Trains therefore offer a significant advantage for passengers seeking flexibility and choice of service compared to coaches. This is relevant to commuters, which as discussed earlier does not generally represent a significant portion of coach passengers. The opportunities to attract commuters onto coach services is likely to be governed by a combination of higher frequencies at peak times (although in an increasingly hybrid/flexible working world, this may diminish in importance to some extent), attractive journey times especially compared to rail but also to car, and competitive fares.

As noted above, the Bristol to Gloucester/Cheltenham corridor already enjoys higher coach frequencies compared to other internal STB routes (albeit far less frequent than rail). These settlement pairs also attract high levels of travel demand by car (see Appendix E). Smaller settlements in between including Stroud and Thornbury are not as well connected to either Bristol or Gloucester and Cheltenham but also display moderate to very high levels of demand. This may therefore highlight an opportunity for enhancement of this existing coach corridor route, potentially for commuters with services during weekday peak periods, calling at Stroud (not directly linked to Bristol by train – passengers need to change in Gloucester) and Thornbury (not served by coach or rail).

Size of Vehicles

Operators will have a range of different vehicle sizes to meet different demands of customers and often blend their excursion and private hire coach work with regular scheduled educational contract work or intercity coach services. As highlighted earlier some regional operators work on contract for the national operators such as National Express and Flixbus. Some operators have vehicles ranging from 8 seat mini-coaches up to around 85 seat double deck coaches. The main typical size categories are;

- Mini-coach – around 15 seats
- Midi-coach – around 35 seats
- Standard coach – between 45 and 55 seats
- Large coach including double-deckers – 60 to 85 seats

Standard coaches tend to be two axle vehicles operating at a gross vehicle weight of up to 18 tonnes whereas some operators use slightly higher capacity three axle vehicles for busier operations. These vehicles may operate up to 26 tonnes gross. Some large coaches tend to be either bus bodied vehicles with coach seats or with specially built twin floor coachwork.

Size of Fleets

Coach fleets vary in size, the smallest having less than five vehicles and the largest over 100 vehicles. CPT⁴³ has categorised the size of operator's fleets and their market share into the following:

- 66% - Small operator – 15 or less vehicles;
- 22% - Medium size operator – 16 to 35 vehicles;
- 8.4% - Large operator – 36 to 60 vehicles; and
- 3.6% - Very large operator – 61 or more vehicles.

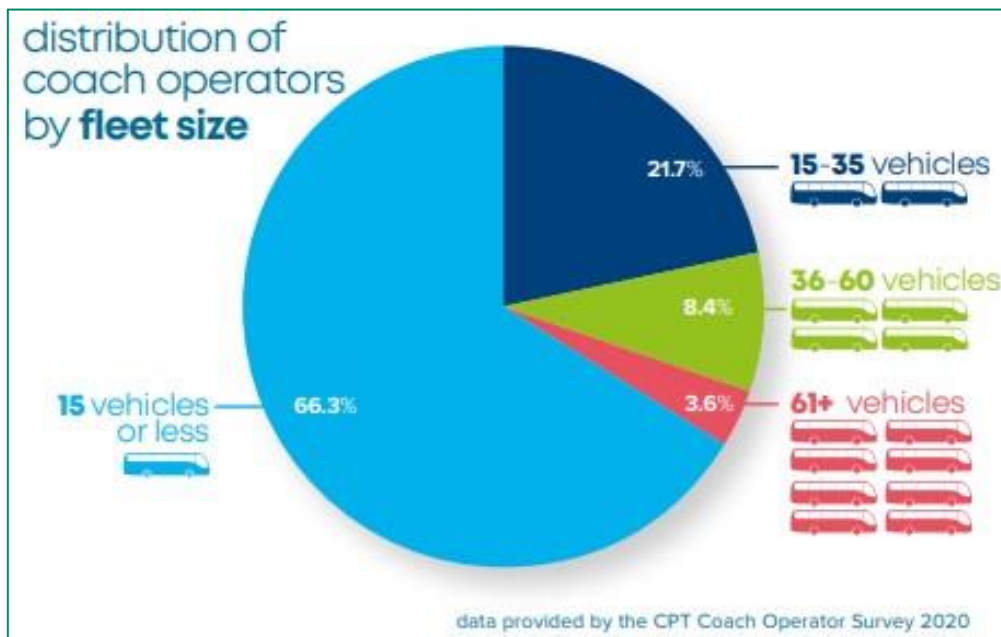


Figure 21 - Distribution of coach operators by fleet size

Many operators are family-run business with a single main depot and perhaps one or two operating centres in a region. A CPT survey reported that 81% of their member companies responding were family or individually owned, often with multiple generations working for the business and deeply embedded in their communities.

Figure 21 shows the fleet size for coach operators in the Western Gateway STB region. This shows that most operators are small with a fleet size of between 1 and 15 coaches, which includes several operators with only one vehicle. The average fleet size in Western Gateway operators is 9 coaches. Meanwhile, there are only five operators operating over 36 vehicles with the largest being Go South Coast who have 101 coaches in their combined fleets.

⁴³ CPT Coach Operator Survey 2020

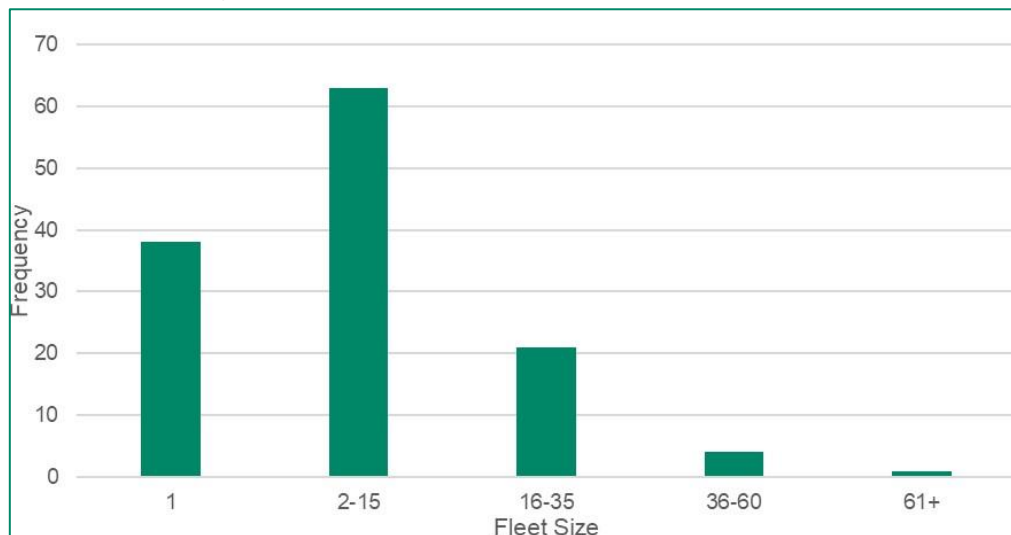


Figure 22 - Fleet size for coach operators in the Western Gateway STB region

Figure 23 shows a pie chart with the percentages of fleet size in the Western Gateway STB region, with the '1' and '2-15' categories combined. This helps reinforce how the vast majority of operators in the Western Gateway STB region have a relatively small number of coaches in their fleet (79.5%). This compares to the CPT national data where small operators represent 66.3%. This shows there are proportionately more small operators in Western Gateway than in the whole of the UK.

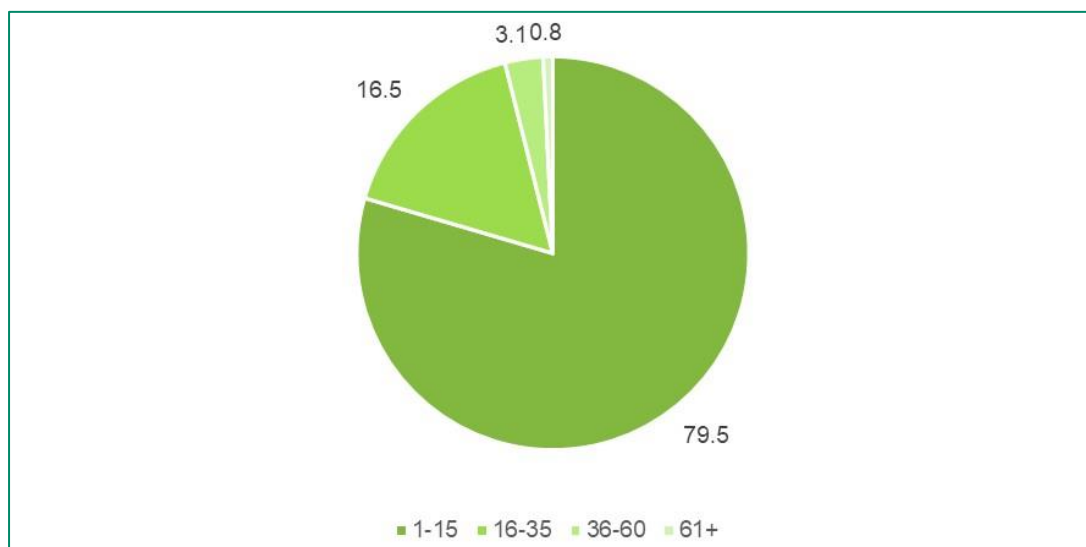


Figure 23 - Fleet size for coach operators in the Western Gateway STB region (%)

Vehicle Numbers

There is limited available data on the number of coaches, with much of the national data combining bus and coach statistics together. Disaggregating this is difficult but as a rule of thumb there is one coach registered for every three new buses in the same time period.

LowCVP has estimated there were around 27,500 coaches in operation in the UK in 2018. They also estimated that of this total around 15% of the coach fleet were Euro VI standard. The use of older “more polluting” coaches is therefore an issue which will be discussed later in this report. Another source of data (Doug Jack) estimated that in 2020 there were 26,000 coaches.

Age of Vehicles/Fleet

It is estimated that the typical lifetime of a coach can be anywhere between 15-30 years, with older vehicles cascaded onto local, lower value work, often low mileage local school transport contracts.

LowCVP reported that between 2006 and 2018 that on average 950 new coaches are registered annually for operation. Had that number been the same before 2006, it would mean that it takes 29 years to completely refresh the coach fleet. It is likely that higher numbers of registrations existed before 2006 but nevertheless the average replacement programme is longer than for Heavy Goods Vehicles where typically lorries are withdrawn after 11 to 12 years. The message is that new diesel coaches going on to the road in 2023 could reasonably be expected to still be on the road by 2050 which is when the Government wants zero emission transport.

Figure 24 shows the year of the oldest vehicle in the fleet for each of the coach operators in the region. This shows that the oldest vehicle was manufactured in 1968, whilst the oldest vehicle in the most modern fleet was manufactured in 2018. There are no operators with an oldest vehicle manufactured more recently than 2018. It should be noted that some of the oldest vehicles may be retained as heritage vehicles not used in regular service. Even when bearing this in mind, there are still several operators with their oldest vehicle being manufactured in the 1970s and 1980s.

It is also worth noting here that, due to the dataset being from early 2020, there are no vehicles included in this dataset with a registration year of beyond 2019. Therefore, it may be the case that in the period up to 2022 some of these oldest vehicles in the fleets may have been retired.

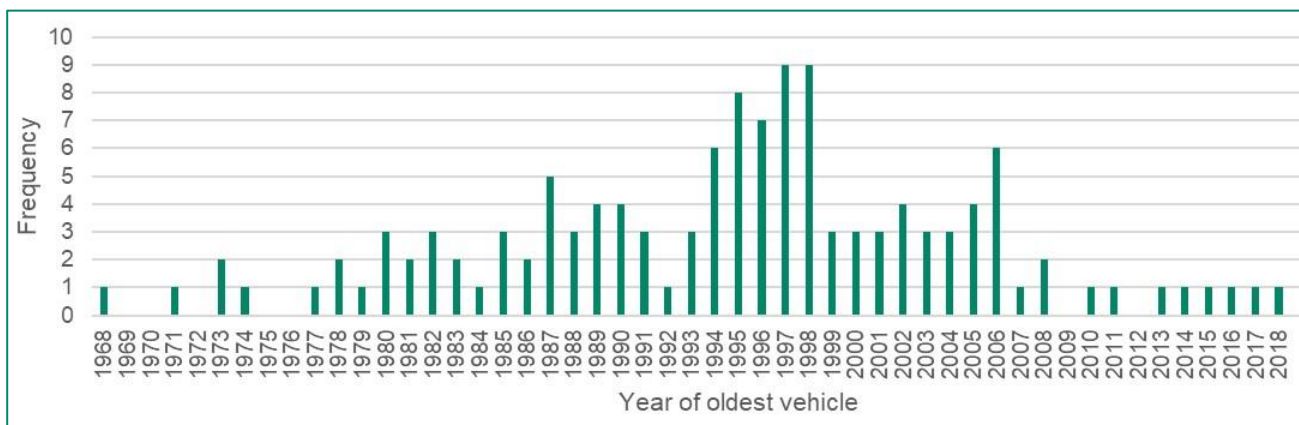


Figure 24 - Year of oldest vehicle for operators in Western Gateway STB region

Figure 25 shows the average age of the fleet for each coach operator in the Western Gateway STB region. This shows that the most frequent average age of vehicles was 12 years old (with a 2008 plate), with the oldest being 1971 and the most recent being 2018. It is interesting to note that, of the 127 operators, 45 have an average vehicle registration age of 1999 or older (35% of operators). In other words, a third of operators have an average age fleet of over 20 years. Where the average age was not a whole year, these have been rounded down to the nearest full year.

Similar to the oldest vehicle age, it is worth noting that, due to the dataset being from the start of 2020, there are no vehicles included in this dataset with a registration year beyond 2019. Therefore, it is likely that in the period from 2020 to 2022 some of these oldest vehicles in the fleets will have been withdrawn and new vehicles acquired. Having said that some SME operators can only afford second-hand vehicles and hence this influences fleet average age.

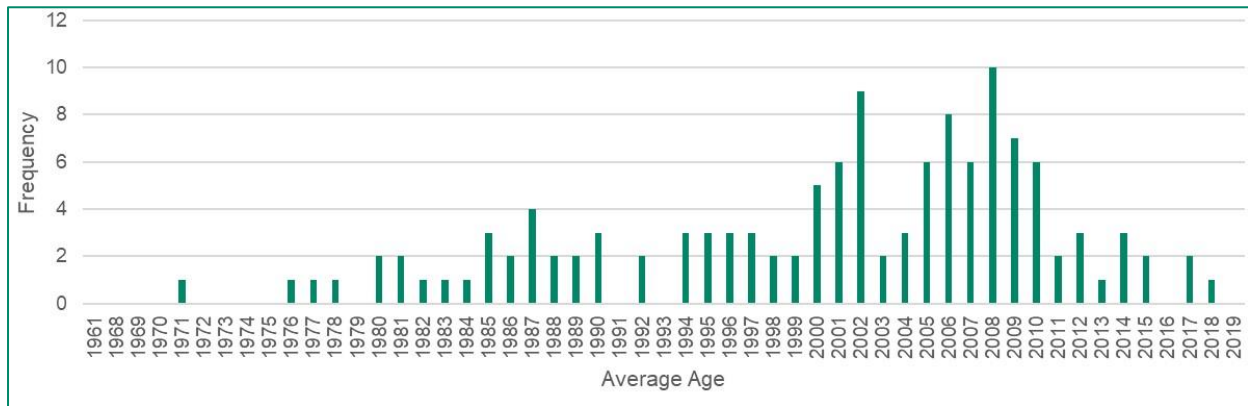


Figure 25 - Average age of vehicle for coach operators in the Western Gateway STB region

Number of Operators

The CPT estimates there to be around 2,500 operators of coaches in the UK, contributing around £6bn to the UK economy each year (CPT, 2020). Together these businesses provide 42,000 jobs across the country. Using a different source (Doug Jack coach), the number of operators in Western Gateway at the start of 2020 was 127.

These 127 different operators within the Western Gateway STB area, collectively operated a total of 1,182 vehicles, as shown in the table below. Gloucestershire has both the most coaches, with 379 as well as the greatest number of operators, with 40. It is worth noting that Poole has the largest number of coaches per operator, with 21, however the data is skewed a little because of Go South Coast being based there. The lowest average number of coaches per operator is Dorset with an average of 6 coaches per operator.

Table 8 - Operators and vehicles registered to addresses within the WG region

Area	Coaches	Operators	Ave no. of coaches/operator
North Somerset	84	8	11
Gloucestershire	379	40	9
Wiltshire	152	21	7
Bath and North East Somerset	55	7	8
South Gloucestershire	123	8	15
Dorset	120	19	6
City of Bristol	92	11	8
Poole	126	6	21
Bournemouth	51	7	7
Total	1,182	127	9

Source: Doug Jack

Employment in the Coach Sector

The coach sector is reliant on having a good supply of professional drivers. In order to drive coaches in the industry, drivers must hold a Passenger Carrying Vehicle licence and complete training for the Driver Certificate of Professional Competence qualification to be able to operate coach services. Drivers must be 20 years old to drive coaches and there is a gap between this and

the school leaving age. There are around 2,000 coach drivers in Western Gateway out of 46,000 nationally.

Like the freight sector there is a major issue relating to the shortage of professional drivers due to the aging demographic. More people are retiring than joining the sector which is an effect also seen across Europe. The industry staffing shortage is worse than ever and there has been a decline in part time drivers compared to 10/20 years ago. Operators must increasingly plan around driver availability rather than vehicle.

With increasing wages in parts of the road freight sector, some dual licence drivers (those with HGV and PSV capability) have left to join the HGV sector. Anecdotally, one coach company in the region lost seven drivers during one month to the haulage sector, however working conditions do not always suit and two of these drivers returned to the coach company soon after.

1,000-2,000 new drivers per year are needed over the next 5 years to address the shortage of qualified drivers, which is expected to raise wage costs over the next five years. Wages are not dissimilar to those working in warehouses and retail (£15,000-£25,000) and may not require doing unsocial shift patterns and split shifts as coach driving can do; these are not always popular.

There are some parts of the country that do have enough drivers such as Isle of Wight and Lincolnshire but most areas have a shortage including in Western Gateway. Wales also has a very acute problem.

CPT have estimated individual driver training costs and a two week intensive training course is often too expensive and inaccessible for smaller operators. The cost of funding the unproductive time during the training course, in addition to the cost of the training itself, is a significant outlay for a small business.

In 2020-21, Covid caused a massive downturn in revenue in the sector and drivers were laid off. The majority of industry operators took advantage of the government's Coronavirus Job Retention Scheme (CJRS) and loan schemes introduced in March 2020. For example, National Express paid employees wages with the CJRS and the company secured £600 million through the government's emergency loan scheme. Whilst the Coronavirus Job Retention Scheme (CJRS) had been enormously helpful, even with all staff furloughed and its doors closed the average coach company faced around £1,900 in standing costs per day (at c. £83 per coach). The industry has not fully recovered to pre-Covid levels in all segments of the market.

There is a need to bring a range of new talent into the industry. This includes new drivers, mechanics and graduates for the management and introduction of new initiatives. This issue would benefit from research to consider the best ways to bring a range of skills into the sector, including career transition opportunities. One idea is that the Armed forces have funding available for licence acquisition to become HGV drivers but not for passenger transport. This represents an opportunity as the armed forces do have coaches.




Manufacturers of Vehicles





There are a wide range of chassis manufacturers and bodybuilders in the coach market. Many of the global truck manufacturers have a bus and coach division such as Volvo, Scania, DAF, Mercedes and Iveco and these chassis may go to a different bodybuilder for the coachwork to be built. However, some manufacturers offer an integral solution from the same factory. Plaxton (part of the NFI group which also owns Alexander Dennis) is the largest coach manufacturer in the UK, dating from 1907, and produces around 200 vehicles a year mainly for the UK and Irish market.




Many coaches are now manufactured internationally and imported for a range of applications. Advancements in modern manufacturing overseas has brought newer technologies into the country quicker than if we were to rely completely on UK production. The coach sector is starting to see a rise of alternatively fuelled coaches with some manufacturers based in the Far East, an example of which is the Yutong TCe12 (see Box 5 regarding the Ember coach service).

Some of the better known and larger-scale manufacturers are presented in the following table as examples of their coaches were seen in operation in the Western Gateway area during Summer 2022 (images taken by a member of the project team). Further images are contained in Appendix A.

Table 9 - Coach Manufacturers Vehicles seen operating in Western Gateway area

Manufacturer	Vehicle products	Regional examples
Plaxton (Alexander Dennis group based in the UK)	Several 2 or 3 axle models suiting the whole range of uses from touring coaches to those needed for educational work. The models include the Leopard, Panther, Panther Cub, the Elite, Elitei interdeck and the Panorama double deck coach which has up to 87 seats. Chassis lengths range from 10.8m to 15 metres. There are 11 wheelchair accessible models that comply with the PSVAR Regulations. https://www.alexander-dennis.com/products/plaxtoncoaches/	 This is a 2017 Euro VI Diesel Volvo B11R Plaxton Elite coach with the aerodynamic swept curve bodywork for style and importantly better fuel consumption. This vehicle was in the Tourist Coaches livery but now has the Excelsior name as part of Go South Coast's fleet.
Mercedes (Germany)	Four models under the Turismo model brand with 2 or 3 axles between 12.3 and 13.9m, including models fitted with PSVAR as standard https://www.mercedes-benzbus.com/en_GB/models/tourismo-rhd.html	 A Mercedes Turismo 49 seater 3 axle luxury coach operated by Gibbons Holidays of Cardiff seen parked in Poole Coach Park. This coach is in use for tourism purposes with the driver away from the Welsh operating centre for 3 days.
Scania (Sweden)	Three main model types – Touring (rigid front axle, 12.1-13.7m lengths, up to 57 seating capacity), Irizar (rigid front axle, 12.2-12.9m lengths, up to 59 seating capacity) and Interlink (rigid front axle, 11-14.9m lengths, up to 67 seating capacity). Diesel, HVO and Biodiesel fuel options across all models https://www.scania.com/uk/en/home/products/busesand-coaches.html	 Southampton based Princess operate around 16 coaches including this 53 seat Scania K410EB4 Interlink HD vehicle on a private hire day trip to Swanage. It is seen driving on to the Sandbanks to Studland chain ferry.

Manufacturer	Vehicle products	Regional examples
Setra (Germany)	<p>A variety of model types and specifications including the TopClass 500 HDH models ranging from 12.5m to 14.2m in length, powered by Euro VI 6cylinder in-line engines.</p> <p>https://www.setra-bus.com/en_DE/models/tc-hdhmodels/models.html</p>	 <p>Setra S416 coach operated by Davies Coaches of Llanelli, South Wales, observed in the Kings Park Coach Park near Bournemouth Football Club's stadium. This vehicle was in use for tourists on a holiday break to the South Coast</p>
VDL Jonckheere (Belgium)	<p>Jonckheere is now part of VDL Bus and Coach which is the sixth largest bus and coach manufacturer in Europe. Three versions of the VDL Futura model ranging from 10.6m to 14.1m in length and powered by 10.8-12.9 litre, Euro VI DAF engines and providing up to 96 seats (on double decker model).</p> <p>https://www.vdlbuscoach.com/en/products/futura</p>	 <p>This vehicle is a Volvo B11R coach with Jonckheere bodywork. Jonckheere is a long established Belgian coach bodybuilder specialising in high quality workmanship.</p>
Volvo (Sweden)	<p>Offer two models, the 9700 and 9900 which range from 12.4m to 13.9m in length and a variety of seating configurations ranging from 49-57 including some models with lifts. Powered by Euro VI Volvo D11k 6-cylinder diesel engines</p> <p>https://www.volvobuses.com/gb/coaches.html</p>	 <p>Volvo Plaxton Panther operated by Glentons of Fife, Scotland on a group holiday package. The vehicle is based at the Hermitage Hotel, Bournemouth where it was doing day trips until the end of the week and its return to Scotland.</p>
Caetano (Portugal)	<p>This Portuguese coach bodybuilder uses chassis from various manufacturers including Mercedes, Scania, Volvo, Iveco and Toyota. Their first coach exported to the UK was in 1967. National Express have specified Caetano Levante 14.9m long 3 axle coaches for many years with Volvo or Scania chassis. The latest offering has many safety features including use of cameras instead of rearview mirrors to remove blind-spots.</p>	 <p>National Express Levante III 14.9m long 3 axle coach at Poole awaiting its journey to London.</p>

Manufacturer	Vehicle products	Regional examples
Yutong (China)	ICE and electric-powered coach models with around 53 seat capacity. in relation to Yutong's T12E e-Coach. Yutong are gaining some market share in the UK due not only to the cost of the vehicles and their development of a competitive electric single decker vehicle. https://en.yutong.com/products/europe/	 The white coach is a 2020 Chinese Yutong model ZK6129HQ coach, operated by Corbel Coaches from London.
King Long (China)	12 coach models varying in lengths and seating capacities, ranging from 8 to 13m in length and from 37-63 seats https://www.king-long.com/about-us_d1 This midi-coach has been through various operators in its 12 year life so far.	 In May 2022 Burrows Coaches of Blandford Forum, Dorset acquired this Chinese C35F-seated King Long XMQ6900 midicoach GN10 COA from Vales Coaches, Dorset.
Irizar (Spain)	This Spanish bodybuilder uses DAF engines in all of its integral coaches. There are several models including the i4, i6 and the top end of the range the i8, which are available in 2 or 3 axle configurations. https://irizar.co.uk/discover-the-irizar-integral-coachrange/	 2022 Irizar i8 integral 3 axle coach operated by Bakers Dolphin from Weston Super Mare.
Other manufacturers include MAN Neoplan (Germany), Van Hool (Belgium), Iveco (Italy and France), Ikarus (Hungary – Chinese owned) and Marcopolo (Brazil).		

PSVAR and Coach Services Accessibility

Coach operators need to make their services and fleets accessible to people with disabilities.

In January 2020, the final provisions of the Public Service Vehicle Accessibility Regulations 2000 (“PSVAR”) came into effect, which relate specifically to coaches designed to carry more than 22 passengers registered before 2000.

PSVAR is a piece of legislation which prescribes accessibility requirements for public service vehicles including buses and coaches. Since the regulations’ inception in 2000, the general position has been that all new buses and coaches designed to carry more than 22 passengers used on local or scheduled services have been required to be fully accessible in accordance with regulations’ terms.

A “local service” is defined as in the Transport Act 1985, i.e. the carriage of passengers on separate fares, unless stops are 15 or more miles apart, or unless the service meets the condition of Part III, Schedule 1 of the Public Passenger Vehicles Act 1981 (comprises of a trip organised privately by persons acting independently of vehicle operators, i.e. private hire).

Under the regulations, a “scheduled service” means a service for the carriage of passengers at separate fares along specified routes, at specified times, with passengers being taken up and set down at pre-determined stopping points, with the exception of tours/private hire.

Initially however vehicles which were manufactured before October 2000 were exempt, but the legislation was drafted in such a way as to allow for a phased implementation for older vehicles, with different categories of vehicle being captured by the requirements of the regulations over time. The 1st January 2020 was the last date for the derogation after which older coaches were brought in-scope.

The requirements of PSVAR include:

- a space for a wheelchair with suitable safety provisions;
- a boarding device to enable wheelchair users to get on and off vehicles;
- a minimum number of priority seats on vehicles for disabled passengers;
- the size and height of steps;
- handrails to assist disabled people;
- colour contrasting of features such as handrails and steps to help partially sighted people;
- easy to use bell pushes throughout;
- audible and visual signals to stop a bus or to request a boarding device; and
- equipment to display the route and destination.

There has been some controversy over on-going exemptions to PSVAR particularly in relation to home-to-school and rail replacement services. In 2021 it was reported that the Government was planning to offer further exemptions, recognising that exemptions cannot be avoided until there are sufficient compliant vehicles to meet demand, whilst impressing on the coach industry and local authorities to focus upon how they can “...provide services inclusively rather than avoid their legal obligations.”⁴⁴

In 2019 the DfT concluded there would be insufficient PSVAR-compliant coaches for home-to-school and rail replacement services prior the compliance commencement date of 1 January 2020. Short-term exemptions had allowed services to run and give operators time to increase availability of compliant coaches, however numbers have remained broadly static. The DfT introduced new medium-term exemptions (MTEs) in July 2022 which would remain in place until July 2026. The policy objectives of these MTEs were (among others) to ensure home to school and rail replacement services continue; reduce uncertainty for operators and commissioners of home to school and rail replacement services; and avoid SME operators going out of business.

The MTEs have steps (or Periods) requiring an operator to progressively increase the compliance of their fleet to be either fully or partially compliant with PSVAR by the start of 1 August 2025. MTEs would bridge the gap between now and 2026, by which point the planned review of PSVAR will have concluded and any necessary post-review amendments implemented.

⁴⁴ <https://www.disabilitynewsservice.com/government-announces-fresh-set-of-exemptions-from-transport-access-laws/> ⁴⁹
https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1071042/medium-term-exemptions-psvar-regulations-2000-impact-assessment.pdf



Figure 26 - National Express Coach with front Wheelchair Lift deployed

It was reported in 2021⁴⁵ that the Disabled Persons Transport Advisory Committee (DPTAC) had commenced engagement with the coach industry over a statement issued by the Committee in January of that year that called for a transition towards PSVAR compliance for all coaches that are used on 'for hire' work. DPTAC has also called for a panel to be formed including industry representatives, manufacturers and disabled people to work on a revised vehicle specification for coach PSVAR compliance. Some coach operators have voiced concerns over the need for increasing the requirements.

Information for passengers

Information on the arrangements of travel for passengers with disabilities varies across operators. National Express offers on its website a good amount of information for passengers travelling on wheelchairs⁴⁶. The operator states that all of the fleet now has a wheelchair lift at the front entrance, however not all stops have enough space for the lift to be deployed.

A provisional list of accessible stops is provided on the same page of the National Express website but passengers are advised to call if no stops local to them are listed as there are more stops where the lifts can be deployed. In addition, passengers requiring assistance during their journey are asked to fill in an online form⁴⁷ or call the assisted travel team at least 36 hours before departure to discuss the assistance needed and to book the accessibility seats which can't be booked online unlike any of the standard seats. This is likely to reduce the convenience and attractiveness of travelling by coach.

Licensing

The independent traffic commissioners regulate the PSV (Public Service Vehicle) operator licensing system in Great Britain, as well as the freight equivalent. The primary purpose is to ensure the safe and proper use of public service vehicles for fare paying passengers. There are four types of licences available however the "standard" licence is the usual one for most operators unless they wish to operate outside Great Britain, in which case an "international"

⁴⁵ https://www.route-one.net/news/dptac-commits-to-industry-engagement-on-coach-psvarcall/?utm_source=routeone+Master+Subscribers&utm_campaign=cbce84f790-EMAIL_CAMPAIGN_2021_02_15_02_23_COPY_01&utm_medium=email&utm_term=0_584b65a2d5-cbce84f790-101231469

⁴⁶ <https://www.nationalexpress.com/en/help/accessibility>

⁴⁷ <https://www.nationalexpress.com/en/help/contact/assisted-travel>

licence is required. The other two licences relate to a small operation of only two minibuses or taxis.

There are various requirements in order to apply for a licence apart from completing the application form and paying the fee. These include providing evidence of financial standing which increases based on the number of vehicles that are expected to be operated on the licence (£8,000 for the first coach and £4,500 for each subsequent vehicle). There is a need to state that the directors and management are of good repute with no legal convictions. Then the name(s) of a properly trained and accredited Transport Manager should be provided who will be in possession of a Certificate of Professional Competence, which allows him/her to apply for an "Operator's Licence".

There is also the requirement to give details of the proposed operating centre (where the vehicles are going to be kept) and the maintenance arrangements including frequency of safety checks and servicing and if outsourced, the details of the garage/maintenance provider.

The Traffic Commissioner must be satisfied with the arrangements for maintaining the vehicles in a fit and serviceable condition and for ensuring compliance with the law relating to driving and operating of vehicles as set out in the Public Passenger Vehicles Act 1981.

Once an operation has started it is still subject to monitoring by the Traffic Commissioner who may attach to an O-licence a condition prohibiting the operator from providing any (or specified) local services where it appears that the operator has run an unregistered local service, failed to run a registered local service or not run it as registered, failed to maintain their vehicles satisfactorily, or their employee or agent has interfered in the running of another operator's local service or operated a local service dangerously.

The Traffic Commissioner may only attach such conditions if it appears that an operator's conduct was reckless or intentional, or that it should be done because of the frequency of the misconduct or its danger to the public.

In order to understand the scale of applications to the traffic commissioners, there were 6,158 PSV applications for new or amendments to licences in the year 2021/22 across the country and this compares to 70,319 Heavy Goods Vehicle applications in the same period. The PSV total is just 8% of the overall number of applications which provides an indication of the relative difference in size of the passenger versus the freight markets. The number of PSV applications has seen a drop of 10% since 2019/20 and this reflects the drop in patronage and interest in setting up new coach companies resulting from the effects of the pandemic. This will be discussed later in this report.

Emissions from coaches

Given the Government's legally-binding commitment to net zero emissions by 2050 and ongoing levels of air pollution in many urban area, it is essential to improve air quality and reduce our carbon footprint.

According to the DfT and their Energy & Environment Statistics, cars and taxis emit 69.7 million tonnes of CO₂ which represents 18% of all domestic emissions, whereas buses and coaches emit 3.4 million tonnes of CO₂ which represents only 1% of all domestic emissions.

The latest Euro VI diesel coaches emit less nitrogen oxides per vehicle than the latest diesel cars, and just one coach-load of people could keep up to 50 cars off the roads, with average carbon dioxide emissions per passenger per journey being around 1.5 times lower than rail, 5 times lower than air and 6 times lower than car travel.

Assuming one person in a car, which is often the case, greenhouse gas emissions per passenger kilometre by Euro VI coach is just 33.8g CO₂e/passenger km, compared to 57.3 for an electric car and 208.9 for a diesel car and 44.2g for rail.

The Low Carbon Vehicle Partnership estimated that the countrywide coach fleet emitted 1,680,000 tonnes of Green House Gas (CO₂e) in 2018. Using the population pro-rata basis (where the Western Gateway STB population is approximately 4.5% of the UK population) it is estimated that coaches with an operational base in the Western Gateway STB area would have produced around 75,000 tonnes of GHG. Although this may seem high, it is positive in that if cars had been used instead of coaches the increase in emissions would have been significant.

Table 10 - Estimated Western Gateway STB area coach environmental effects

	UK	Western Gateway STB area
No of coaches	27,500	1,238
No. of new coaches/year	950	43
Value of sector to economy	£6bn	£270m
Vehicle kms	1.29 bn	58m
Passenger journeys	400m	18m
GHG tonnes	1,680,000	75,600
Tonnes of NOX	6800	306
Tonnes of Particulate Matter	77	3.5
Air Quality damage cost	£48.4m	£2.18m
Notes	Low Carbon Vehicle Partnership estimations	Calculated for this strategy on a pro-rata basis assuming 4.5% of the adjacent column

Emissions from coach fleets will continue to gradually reduce as operators acquire more low emission Euro VI vehicles as replacements for older more polluting Euro III and IV coaches.

The introduction of electric and hydrogen fuel-cell powered coaches as they come on to the market will mark a step-change in reducing emissions from coaches. There are however very limited numbers of manufacturers with electric and hydrogen vehicles available for sale so far such as Toyota and Yutong but more suppliers are expected to bring new models on to the market over the next two or three years including Volvo and the Mercedes-Benz Group. Indeed, some manufacturers such as Wrightbus in Northern Ireland who have electric and hydrogen buses for sale but have not offered a coach option in recent years are thinking about developing coach options.

The Yutong TCe12 electric coach became the first fully battery electric vehicle to go into service in the UK in 2019 with coach operator Westway, London. The vehicle has 258Kwh of battery capacity and can be charged with either a 60Kwh, 90Kwh or 120Kwh DC charger.

According to Pelican (the dealership) this makes a full charge possible in around two hours and they said, “similar coaches operating in Paris are averaging better than 1km per kWh of charge used on a duty cycle that is very similar to potential operation in the Greater London area. This will allow operators a range of about 200 miles on a full charge, depending of course on how the heating and cooling systems are used. For electric vehicles, it’s always a very delicate balance between range (battery capacity), cost and weight and in the UK we are limited by the 11,500kg rear axle legal weight whereas the same vehicle has a 13,000kg rear axle rating in France. The push for clean air in cities means that, for city centre work, only a zero emission vehicle is completely future proof”.

However, running alternatively fuelled coaches is not without its issues. The recent increase in energy prices has meant some business cases based on a much lower cost of electricity are now no longer attractive. The operator Westway, that has been running some of these electric coaches, have found the electric charging takes too long for some of their operational needs.

For coaches on local work, the distance range will be sufficient but long distance work would require ‘opportunity charging’ away from the operating centre. This means it is important that a national network of ultra-rapid chargers for heavy duty vehicles is available for coach operators. Coach drivers that have a long lay-over period at a destination may have time to recharge the coach batteries before the return journey but this is not an option for scheduled coach services where the vehicles are used intensively and have less lay-over time.

There may be a problem when installing charging systems where the operator has a shared premises as the site owner may not be willing to assist with the installation of a charging system and the possible need for an upgrade in local power supply in discussion with the local District Network Operator (DCO).

The majority of the Western Gateway is covered by a single DNO, Scottish and Southern, with the western and northern-most fringes of the area instead covered by National Grid.

Box 5 – Ember electric scheduled coach service

Ember is the UK's first all-electric interurban coach service, which connects Dundee to Edinburgh and Dundee to Glasgow. The service began in 2019 with two Yutong TCe12s. It has since used some funding from the Coronavirus Business Interruption Loan Scheme (CBILS) and now has a fleet of 10 vehicles.

Each vehicle has a range of up to 200 miles on a single charge and provides passengers with extra legroom seats, 5G Wi-Fi, USB charging points. Due to their Ultra Low Emission status, each vehicle receives 30/pence per km travelled, through the Government funded Bus Services Operator's Grant (BSOG) LEV scheme.



The use of BODS (Bus Open Data Service) technology aims to provide an efficient service, allowing passengers to plan their journey in advance, as well as monitor service delays using the real time tracking feature. Ember tickets also allow passengers to use the tram services to Edinburgh Airport, as well as providing free cancellations and refunds.

The services have multiple stops connecting towns and villages, providing crucial connections across the region. Most of which are demand responsive and require passengers to book at least 10 minutes prior to minimise delays. The reduced Sunday timetable is used to maintain the fleet on a weekly basis.

However, in the case of disruption, Ember uses diesel coaches, taxis and minibuses to minimise passenger delays. At present, Ember is expanding its network to Inverness and has ordered 26 Yutong TCe12s to add to its fleet. As well as implementing additional charging facilities across Scottish cities.

Ember's use of technology allows it to provide an accessible service, allowing passengers to plan their journey in advance, monitor delays and purchase tickets on one platform. The focus on comfortable, cost-effective journeys has proven popular with passengers, alongside its sustainable vehicles.

Where there is insufficient supply of power to facilitate the installation of new chargepoint infrastructure, depending on the complexities of introducing a supply and local conditions, it could cost tens of thousands of pounds to remedy the situation at the expense of the operator.

Although hydrogen buses have been in use in cities like London and Aberdeen for over a decade, hydrogen is not fully developed yet for the coach market and it would require major outlay. A European Union funded project is currently investigating coaches with hydrogen fuel cell powertrains (see Box 6).

Box 6 - Coaches with hydrogen fuel cell powertrains for regional and long-distance passenger transport with energy optimized powertrains and cost optimized design – “CoachHyfied”

There has been significant investment and successful deployment of fuel cell technology in city bus fleets across parts of Europe, but in contrast there has been little development of technology for inter-urban coaches.

The aim of the five-year CoachHyfied project, which commenced in 2021, is both to carry the experience from the development of fuel cell city bus systems into the more challenging constraints of typical coaches as well as to strengthen the European vehicle manufacturing base and supply chain of hydrogen components.

This project has received funding from the Fuel Cells and Hydrogen 2 Joint Undertaking (JU) under grant agreement number 101006774. The JU receives support from the European Union's Horizon 2020 research and innovation programme and Germany, Denmark, United Kingdom, Austria, France, Netherlands, Latvia, Turkey. Coventry University will contribute to the project, with its Centre for Advanced Low Carbon Propulsion Systems (C-ALPS) responsible for work on the thermal management technology used by the project.

The project is developing two coach solutions specifically to solve the challenges of longer driving distances of regional and long-distance coaches (400-800 km) and should address what are recognised as the more stringent packaging constraints of coaches, less favourable driving patterns (lower recuperation) and higher auxiliary power requirements for air conditioning & heating.

One set of coaches will be based on the development of an OEM-based new-built FC coach and the other set is based on an existing coach retrofit to provide answers for the second life use of environmentally outdated coach chassis.

Both coach types are being equally addressed by applying a common hybrid system concept and preparing for the development of fuel cell drive system synergies,

The project is comparing different and modular fuel cell packaging concepts by the use of multiple and single fuel cell units being tested in fulfilment of the 100kW power requirement.

The project involves partnering with established fuel cell manufacturers promising to reach the required 25,000 operating hours minimum.

<https://cordis.europa.eu/project/id/101006774> <https://www.route-one.net/features/coachyfried-hydrogen-coach-project-uk-contribution-clear/> <https://coachyfried.eu/>

Another measure that has produced positive results in reducing emissions has been in retrofitting older coaches, mainly Euro V, with either exhaust treatment systems, new engines or other modifications so as to comply with Euro VI specifications. Unlike the bus market where this has been done in some quite significant numbers, the volume of coaches adapted has been very limited. This is mainly due to the issue of who can afford the

approximate £15,000 or more to retrofit each vehicle but also is due to the fact that only a proportion of the vehicle market is capable and approved for adaptation.

There would be merit in investigating the number of Euro V coaches operating in the Western Gateway area and establishing how many would be suitable for retrofitting and whether there would be any funding to assist in this process. It is important to note that many of the Euro V coaches have a further 10 years of operational life and hence may be worth the investment in retrofitting. Part of the reason for considering this is that many coach companies simply cannot afford to upgrade their coach fleet to lower or zero emission vehicles, in particular smaller operators of which, as was established earlier in this report, there is a greater proportion in the Western Gateway STB area.

Initiatives to decarbonise the sector have increased in recent years, with the DfT funding projects surrounding low emission vehicles as well as schemes to improve access to the electricity network for operators. The Zero Emission Vehicle Repower Accreditation Scheme (ZEVTRAS) will allow all buses that are accredited by the Zemo partnership to access the Bus Service Operators Grant (BSOG). To do so, vehicles must demonstrate a minimum of 50% reduction in greenhouse gases in comparison to a Euro VI vehicle. Additionally, the DfT has worked with Ofgem on a scheme that ensures electricity networks reflect operators needs and usage, while avoiding unnecessary charges on their energy bills. For operators with electric vehicles this would reduce the overall connection charge and strengthen protections for bill payers.

Box 7 – Scottish Zero Emission Bus challenge fund

The purchase of zero-emission coaches for use on private hire, tourism-related and home-to-school work is set to be eligible for capital grant funding under the second round of the Scottish Zero Emission Bus challenge fund (ScotZEB2). This is reported to be the first time in the UK that public money has been approved for the wider coach sector to help it to decarbonise. In Scotland, battery-electric coaches for use on scheduled services by Ember have previously been allocated grant support.

Coaches for use in the three segments mentioned above are specifically included on the list of vehicles that are expected to be eligible for support from the fund which will launch in 2023, and are shown in ScotZEB2 indicative guidance published by Transport Scotland.

Ahead of the launch of the fund, there will be a £500,000 Market Transition Scheme (MTS) which aims to support the development of ScotZEB2 bids. Small and medium sized coach and bus operators are among the organisations eligible to apply for MTS funding to help them to understand the key steps required to replace their fleet with zero-emission alternatives.

<https://www.transport.gov.scot/public-transport/buses/scottish-zero-emission-bus-challenge-fund/>

Coach Stop typology

Depending on the type of service and the needs of passengers, coaches make use of different types of stops, stations/interchanges, drop off and parking/layover locations. Some may be dedicated to coaches, but more typically the facilities, particularly those on the public highway, will be shared with bus services. The locations of these five typologies of stops/interchanges/parking locations are shown below.

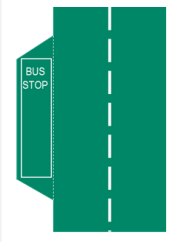

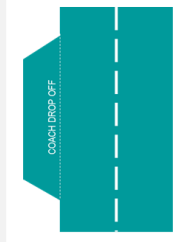



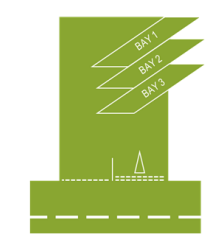

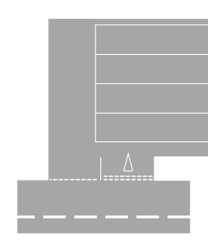

<p>Type A - On-Street Stops</p>  <p>Key characteristics:</p> <ul style="list-style-type: none"> On-street within carriageway or in lay-bys May be shared with bus stops Kerbside facilities and features could include flag pole, Kassel (raised) kerb, shelter, seating and RTI panels but could be very limited <p>Types of Coach Services:</p>  <p>Examples include:</p> <ul style="list-style-type: none"> University of Bristol Coach Stop Codford Coach Stop 	<p>Type B - On-Street Drop-Off Locations</p>  <p>Key characteristics:</p> <ul style="list-style-type: none"> On-street within carriageway or in lay-bys May be shared with bus stops Likely to have limited or no kerbside facilities or features <p>Types of Coach Services:</p>  <p>Examples include:</p> <ul style="list-style-type: none"> Old Orchard Drop-Off, Poole Terrace Walk Drop-Off, Bath 	<p>Type C - Off-Street Stops/ Drop-Off Locations</p>  <p>Key characteristics:</p> <ul style="list-style-type: none"> Segregated from the carriageway May include dedicated bays for coach/bus stops, drop off locations and coach/bus stands May have some kerbside facilities including flag pole, Kassel (raised) kerb, shelter, seating and RTI panels but could be very limited <p>Types of Coach Services:</p>  <p>Examples include:</p> <ul style="list-style-type: none"> Poole Coach Stop – Seldown Coach Park Weston-super-Mare Coach Stop 	<p>Type D - Stations / Interchanges</p>  <p>Key characteristics:</p> <ul style="list-style-type: none"> Dedicated station or hub to facilities interchange between bus and coach services Could be dedicated to either bus or coaches, or with dedicated bays for particular services More likely to be staffed and include features such as shelter, seating, toilets and information kiosk. <p>Types of Coach Services:</p>  <p>Examples include:</p> <ul style="list-style-type: none"> Gloucester Transport Hub Bournemouth Coach Station 	<p>Type E - Longer-Term Parking</p>  <p>Key characteristics:</p> <ul style="list-style-type: none"> Parking designed for coaches, off the carriageway and potentially in more remote locations away from urban centres. <p>Types of Coach Services:</p>  <p>Examples include:</p> <ul style="list-style-type: none"> Millstream Coach Park, Salisbury Bristol Fruit Market Coach Parking
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Figure 27 - Coach Stops and Parking Location Types

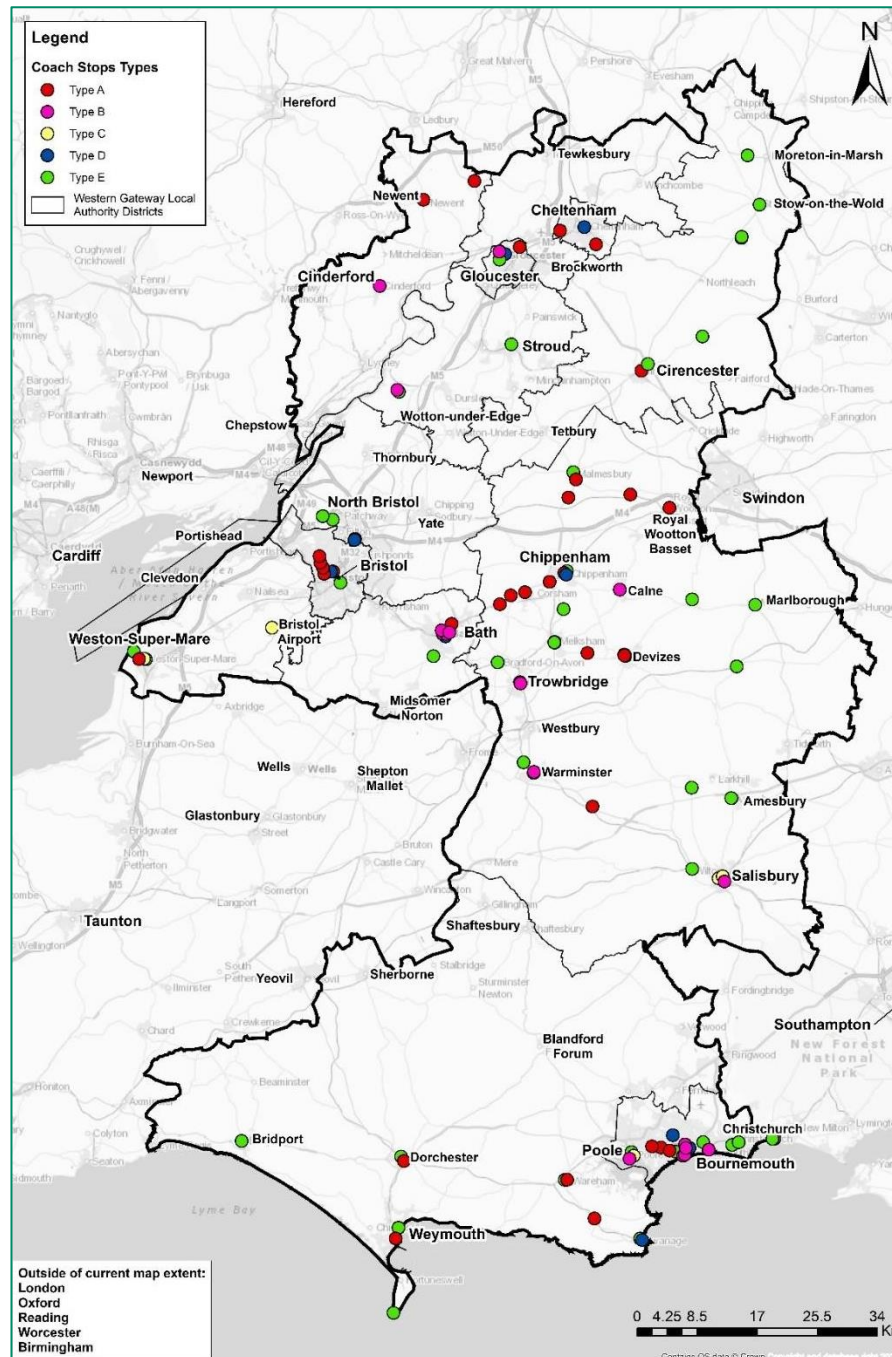


Figure 28- Stops, Interchanges, Drop-off Points and Longer-Term Parking Locations for Coaches across the Western Gateway

The geographical spread of stops used by scheduled coach services within the Western Gateway STB area, predominantly those operated by National Express, are shown Figure 29. This indicates clustering of stops in the major urban areas, with a greater concentration within the central part of the Western Gateway STB area including Bristol and Bath. The areas where there are no coach stops include between Gloucester/Cheltenham and Bristol/Bath (including places like Thornbury, Malmesbury and Yate) and between Warminster, Dorchester and Poole/Bournemouth (including places like Sherborne, Shaftesbury and Blandford Forum).

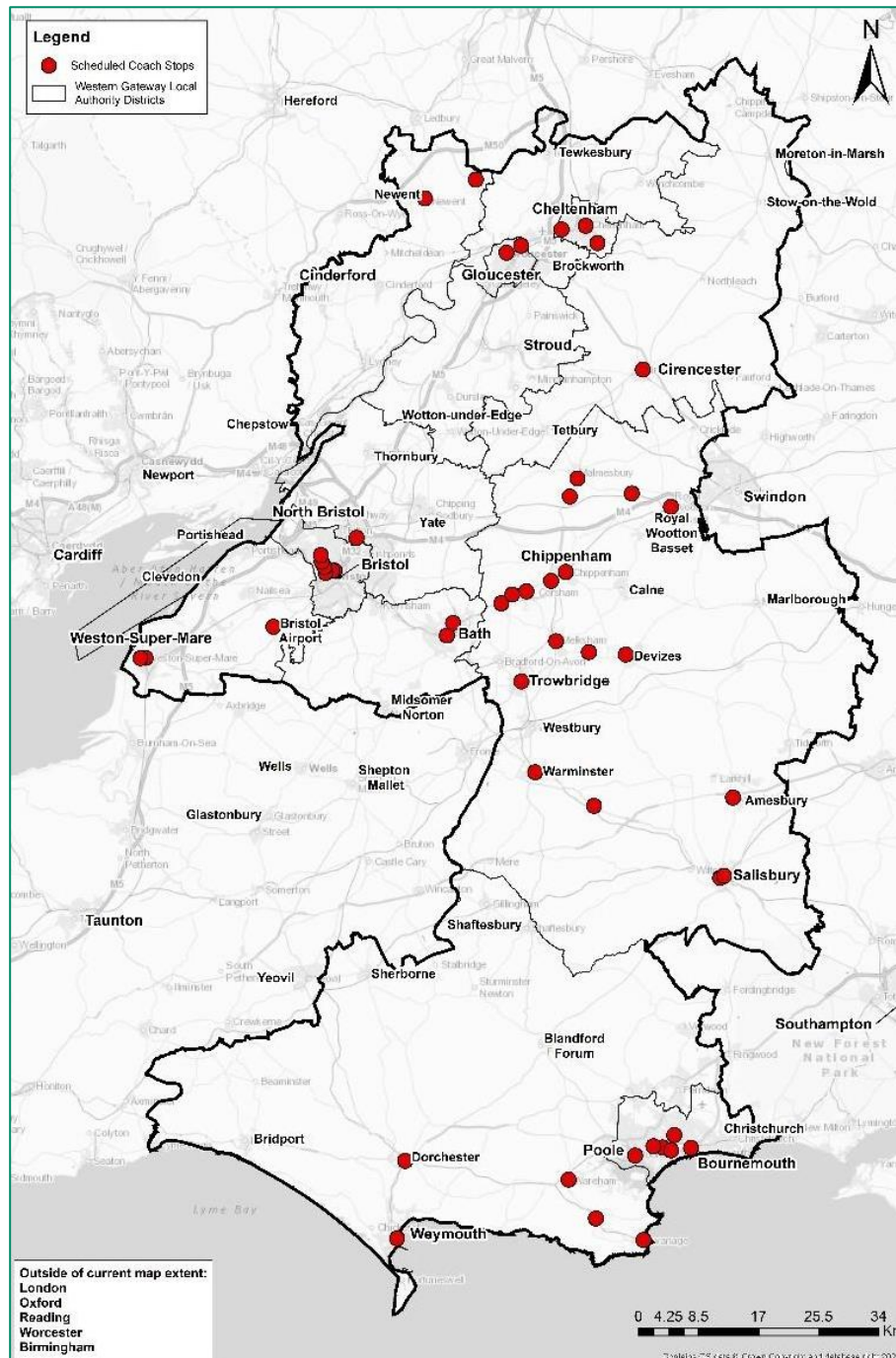


Figure 29 - Scheduled Coach Stops

The five typologies are described in more detail in the following section. Observations made on site visits are contained in Appendix G.

An **On-Street Stop** is a designated coach stop used by scheduled services, found on the kerbside of a road. The stop is more often shared by local bus services and are unlikely to offer many facilities for waiting passengers except potentially for a shelter. The stops are typically located in more central urban areas such as town/city centres however there are examples of stops located in quieter, suburban areas such as the Charlton Kings stop in southern Cheltenham or the Arle Court stops on the A40 in western Cheltenham (see Box 8). The example shown below is on Queen's Road in Bristol.



Figure 30 - University of Bristol Coach Stop (Bristol)

An Off-Street Stop/ Drop-Off Location is similar to an on-street stop and would be used mostly by scheduled services and found off-street within a dedicated layby which can only be used by coaches or buses. This is the case, for instance, at the Seldown coach stop in Poole (Figure 30), which is served by scheduled services and is located in a dedicated coach area within a larger car park. Several of these sites in fact are found within wider parking areas also offering long term parking bays for coaches.



Figure 31 - Seldown Coach Stop (Poole)

Stations/Interchanges are generally served by a combination of bus and coach services and comprise multiple bays in an area off the main highway therefore private cars are not permitted to enter.

Passengers can transfer between different services. In most of the cases, a station/ interchange offers a sheltered waiting area and in some cases a ticket or information kiosk is available and the station may be staffed.

They are usually located within or close to an urban centre and/or adjacent to railway stations (an exception being the planned Arle Court Transport Hub – see Box 8) and there are many

examples across the Western Gateway, including the Gloucester Transport Hub and Bristol Coach Station.



Figure 32 - Gloucester Transport Hub

On-Street Drop-Off Locations are where coach drivers are authorised to stop for limited times and where passenger can get on/off the coach. The drop-off points are not used by scheduled services as they are exclusively for the use of private-hire and tour coaches. There are several examples of such points across the Western Gateway, particularly within city centre areas. Dedicated drop-off points may also be located outside or within the grounds of schools for coaches providing home-to-school and day trip services however these have not been mapped as part of this strategy.

Drop-off points can be marked on-road or within designated laybys and are usually found near tourist attractions or other sites of interest for tourists and students. An example of standard drop-off point is the coach bay along Old Orchard in Poole which is shown below.



Figure 33 - Old Orchard Coach Drop Off Point (Poole)

Long Stay (Layover) Parking locations typically comprise marked bays where coaches can be parked for longer intervals and that are not used as drop-off points or where passengers would disembark. In some cases, like the Weymouth Coach Park, these are standard parking areas in more remote locations, sometimes with limited facilities for drivers. Another example is adjacent to the Odd Down Park and Ride site near Bath. Some of these sites experience minimal maintenance and the surfaces are often of low quality.



Figure 34 - Millstream Coach Park (Salisbury)

Box 8 – Arle Court Transport Hub, Cheltenham

An improved transport interchange is in development, located on the outskirts of Cheltenham, adjacent to the A40 and close to M5 Junction 10. The improvements will deliver expanded bus services, improved facilities on site and better connections to the local walking and cycling network as well as provide a multi storey car park, Park and Ride bus services into Cheltenham and opportunity for long-distance coach services to make a stop. The aims of the scheme are to:

- Improve connectivity within, to and from the west Cheltenham area for sustainable transport as people look for alternatives to cars;
- Improve connectivity to enable more journeys to central Cheltenham, Gloucester, the railway station and local hospitals by sustainable modes of travel; and
- Provide a regular, reliable transport solution that will reduce unnecessary car journeys into central Cheltenham.

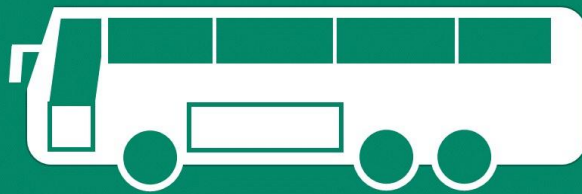
Improvements have already been made to the nearby M5 Junction 10. The expansion of Arle Court Transport Hub and the planned improvements will provide a more integrated transport network, by enabling opportunities to switch to more sustainable transport modes around Cheltenham. The improvements to the existing Park and Ride site focus on sustainable transport, providing high-quality alternatives to car use.

Planned on-site facilities include covered waiting area including seating; information screens and desk; opportunity for small kiosk or food offering; and toilets and a changing place.

Some long distance National Express (operating between Hereford, Worcester, Gloucester, Cheltenham and London) and Megabus services (operating between Bradford, Newcastle, Bristol and Cardiff) make a stop at nearby laybys on the A40, and it is possible these services will use the new transport interchange in the future. Arle Court will be a fairly unique facility in the Western Gateway, given the combination of modes and its location out of town and close to the motorway network. The only other major out-of-town facility is at the UWE Frenchay campus, however this is not regarded as a major multi-modal transport hub.

It would appear similar in composition to the Milton Keynes Coachway on the M1, which provides a convenient stopping point for long distance coach services between London, Midlands and North of England and avoids a long detour into/out of Milton Keynes city centre, therefore keeping journey times as low as possible.

Most scheduled coach services in the Western Gateway serve the main urban centres. Even for longer distance routes, coaches will route into the centres of large cities like Bristol as they generate passenger demand and its where interchange with other transport modes is more likely to be feasible. However, travelling into the centres of towns and cities could be an inconvenience for “through” passengers, especially those travelling long distances, more regularly by coach or more time sensitive. Locating additional stops, whether they are larger-scale interchanges like Arle Court, or simpler stops, on the outskirts of larger settlements, within suburbs and close to major employment or retail centres, could make coach services more accessible, however consideration would need to be given to the additional time it would take for services to make a stop and whether this would make the overall journey time by coach less attractive to passengers.



Challenges

7. Challenges

The previous chapter provides an overview of the coach sector both nationally and within the Western Gateway STB area and this has highlighted some important features of the sector which present a challenge and/or opportunity for the future of coach services.

This chapter outlines the key challenges which apply to coach operators in the Western Gateway, and in most cases, nationally as well.

National trends and issues

Regional coach sector challenges should be considered against the backdrop of broader themes or issues related to society, the economy and the environment. These themes and issues are either already having an impact today or could become more prominent and evolve in the future, which will affect the everyday lives of people living, working or visiting the Western Gateway STB area.

The restrictions put in place to limit the impacts of COVID-19 resulted in significant reductions in passenger transport demand, and the rail and bus sectors have been slow to recover. As was discussed in the previous chapter, demand for coach services has recovered more quickly. However, the pandemic has established some potential longer-term trends in people's travel behaviour, in particular journeys to work. There has been an increase in people working from home as opposed to travelling to an office, and this has contributed to a reduction in commuter trips including those made by public transport.

This has more likely had an impact on train and local bus services as opposed to coach services, given the types of trips coach passengers typically make using most scheduled services which is day trips, visiting friends/family, accessing transport hubs such as airports and students travelling between home and university.

Commonly commuting travel make up a small proportion of most scheduled services, except those geared specifically towards commuters and operating during peak periods to major employment centres (such services are more common on major radial corridors feeding into Greater London such as Greenline (Luton/Hemel Hempstead) and Kings Ferry (Kent)).

However, the pandemic has also brought about a reduction in business travel either domestic within the UK or overseas, and this could have an impact on coach demand. The pandemic may have contributed to more people moving out of larger urban areas to more rural areas in pursuit of a better quality of life. This could impact on travel patterns and behaviours, potentially increasing reliance upon the car to make every-day journeys especially in areas where the availability of passenger transport services is more limited.

Linked to a dispersal of the population, all of the local planning authorities within the region are planning for where new homes and jobs will be located. They could be located on brownfield sites within urban centres, closer to amenities and established passenger transport links. However, larger scale development is more likely to take place on greenfield sites on the edge of existing settlements, including smaller towns and villages, or on standalone sites, which could be further away from amenities and existing passenger transport links.

Well-planned, sustainable developments should aim to maximise the opportunities of travelling by public transport or on foot and by bike, however such developments could generate more complex travel patterns. Effective rural mobility will be critical to serving existing and new, enlarged communities situated away from the established urban centres

and main transport corridors. Such issues have been highlighted in the Western Gateway and Peninsula STBs' Rural Mobility Strategy as discussed earlier in the report.

There is a rationalisation and centralisation of some services, including health services and banks/building societies. The latter is being countered with an increase in online banking facilities, although some portions of society will feel excluded from such technological changes. The UK's ageing population is particularly at risk from this type of digital exclusion, and opportunities to live in housing well-connected to amenities and wider transport infrastructure can mitigate this. As the trend towards an older, ageing society continues, this may bring increased demand for safe and accessible public transport services.

Rationalisation and centralisation of services could mean that people need to travel further, and for people without access to a car, they may need to use more than one passenger transport service to reach their destination, thus driving the need for a better-connected transport network.

Technology will continue to have a significant influence on people's lives. The ability of people to work from home is reliant upon efficient digital connectivity including fast broadband. While this shift has meant a reduction in demand for many public transport sectors, it is important to recognise that some younger people are shifting away from driving and vehicle ownership. They are likely to be more reliant on public transport than their parents, and therefore there may be opportunities to develop new public transport services. Ideally, such services would operate flexibly rather than focusing on traditional peak hours, in recognition that the 9-5 presenteeism culture is dwindling.

Technology will also be key to facilitating changes in transport modes and facilitate the decarbonisation of the transport sector. For example, the government has committed to banning the sale of new petrol and diesel cars and vans by 2030. To keep pace with consumer expectation, the coach sector will need to find ways to decarbonise along a similar timeline. Indeed, as was discussed earlier in the report, given electric coaches are now coming to market, the sector has an opportunity to set itself apart from other modes as a sustainable choice. Of course, significant barriers remain in the widespread adoption of electric coaches, including cost of vehicles, charging infrastructure and battery range.

The cost-of-living crisis is affecting most households and industries, with widespread inflation of the costs of goods and services. The coach sector is suffering alongside others from the considerable increases in fuel and energy costs.

Alongside the impacts of the pandemic, the cost-of-living crisis, and disruption to travel caused by strikes, controls brought about by Brexit could contribute to an increase in people taking holidays, weekend breaks and day trips in the UK as opposed to overseas. There may be increased travel demand to leisure destinations closer to home including coastal resorts such as Bournemouth, Weymouth, Swanage and Weston-Super-Mare. In contrast, the air travel sector has continued to recover following the lifting of COVID-related restrictions, and whilst there may continue to be some instability amongst some airline operators (and airport operators), there appears to be continued appetite for international travel.

The national and regional picture for coach operators is therefore unstable, as it is for many industries. Wider economic factors and trends (COVID, Brexit, the Ukraine war, energy costs etc), alongside an industry-wide difficulty with staffing and recruitment, have contributed to a tough climate for coach operators. These challenges are set out thematically below.

Key challenges for the Western Gateway coach sector

The Western Gateway is a large region, with several city attractors as well as nationally significant tourist and cultural attractors. Some of these destinations are well-served by other public transport routes/modes (see Chapter 6 and Appendix C). Other destinations in the region, particularly medium-sized towns, are poorly served by public transport and many services often operate on a limited basis. As a result, the lack of regular scheduled services means passengers often use other modes of transport.

This may present opportunities for improved public transport connections, particularly if this can be achieved using a flexible, low-cost mode.

The Western Gateway coach sector has a particularly high proportion of small coach businesses, compared to the national average (see Chapter 6). This sector profile means that the challenges facing smaller coach operators are more significant regionally than they are nationally. As identified in our interviews with coach operators (see Chapter 2), small coach operators face a growing number of issues including:

- Difficulty upgrading smaller, older fleets to vehicles compliant with air quality standards;
- Issues with recruiting, training and retaining drivers, in the face of competition with the haulage sector and larger operators;
- Difficulty keeping up with evolving government policies and standards for the sector, which can be costly to ensure compliance; and
- There is significant change ongoing in the sector, including businesses adapting to a post-COVID environment, new government standards, and the move to decarbonisation. Change often requires financial investment, to adapt and futureproof the business. Many small operators are run by, and staffed by, an ageing workforce that may be less able to make these kind of longer-term business investments. For example, older people will struggle to achieve the same kind of vehicle finance packages that a younger vehicle owner/business owner might be offered.

Based on site visits conducted within the region (see Appendix G), some key regional challenges have been identified in terms of infrastructure and facilities at stops and interchanges. These site visits also identified challenges around information and passenger experience, and finally raised issues around facilities for coach drivers and operators.

The challenges facing the coach sector (and opportunities for change) are categorised into six strategic themes, as shown in Figure 35. These challenges are specified at a high level in this section, with some introduction into the kind of solutions/opportunities they might present. In the following chapter, these challenges are formed into a set of emerging objectives for the coach strategy, with opportunities/policy principles categorised within these.

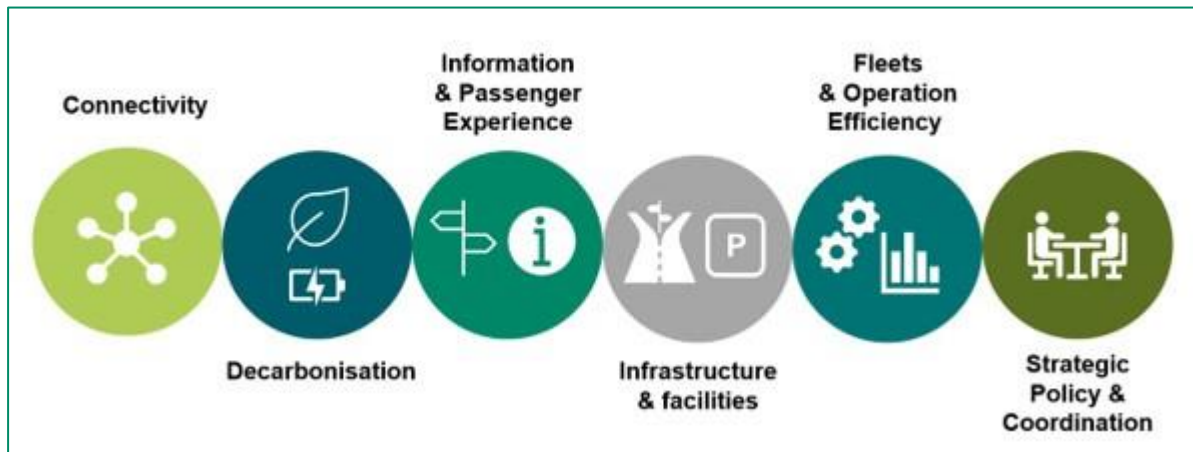


Figure 35 - Challenge Themes

Connectivity challenges relate to service routes between places, including urban centres. These challenges are Western Gateway region specific.

Decarbonisation challenges relate to the emissions from coaches and adoption of new technologies to reduce carbon. Such challenges are broadly experienced at a national rather than regional level.

Information and passenger experience challenges relate to how people use coach services, access information and purchase tickets. Many of the challenges raised in this section are Western Gateway specific, based on site visits to stops and interchanges within the region.

Infrastructure and facilities challenges relate to the stops, interchanges and parking locations used by coach services. Many of the challenges raised in this section are Western Gateway specific, based on site visits to stops and interchanges within the region. **Fleets and operation efficiency** challenges relate to how coach services are managed, maintained and kept profitable. Such challenges are broadly experienced at a national rather than regional level.

Strategic policy and coordination challenges relate to the broader decision-making frameworks which could influence coach services operations nationally and regionally. Such challenges are broadly experienced at a national rather than regional level.



Theme 1: Connectivity

Limited connectivity regionally: Large parts of the Western Gateway area are no longer served by coaches or have very limited services available. Even services designed to replace closed railway lines have mainly been withdrawn leaving parts of rural Dorset, Wiltshire and Gloucestershire with little public transport. Some corridors also lack alternative, direct rail connections, therefore increasing reliance upon private car travel. This is most acute within the STB's defined Midlands to South Coast multi modal corridor, including connections between Cheltenham/Gloucester, Chippenham, Bath and Poole/Bournemouth.

While new rail connections are difficult, costly and time-intensive to deliver, there may be potential for some of these 'connectivity gaps' to be filled by new coach routes. These could be fixed commuter routes between key hubs with few public transport options, or more 'demand responsive' routes.

Lack of public transport connections between smaller towns: Some smaller towns lack any inter-urban transport connections (rail or coach) including Thornbury, Shaftesbury, Blandford Forum and Malmesbury. Trips between towns of this size are likely to be heavily reliant on cars and therefore present opportunities for conversion to public transport trips, if sufficient demand can be identified. (Appendix E sets out demand between different origins and destinations with the Western Gateway STB region).

Lack of multi-modal connectivity: Given their nature as longer-distance, limited stop services, coach stops/interchanges are some distance apart and there may only be one or two stops within a large urban area. Many are centrally located but the need to take another mode of transport to access these stops may discourage some people from travelling by coach.



Theme 2: Decarbonisation

Electric vehicle purchase costs: The cost of an electric coach is significantly higher than a typical internal combustion engine coach. In some cases the cost of an electric coach can be £100,000 more than the diesel equivalent. Furthermore, the cost outlay of installing charging infrastructure at depots can be very significant for operators. Anecdotal evidence suggests that electric coaches perform well, particularly for shorter distance local trips e.g. school drop-off / pick-up, which is a significant proportion of some (particularly small) operator's business. While there are significant barriers to EV take-up in the coach sector, there are signs that the vehicles will be popular at least for some trip types.

Electric vehicle availability: There are very few electric coach models currently on the market – a lack of choice may increase reluctance to switch from diesel to electric coaches.

Retrofitting: Retrofitting engines is a costly process designed to reduce tail-pipe emissions from older vehicles. Various technologies exist to upgrade the Euro standard of combustion engines, or to convert engines to alternative fuels, e.g. LPG. Many operators, particularly smaller businesses, will struggle to afford this kind of financial outlay, particularly on an older vehicle which will still need to be replaced in the medium-term. Increasing regulatory pressure to ensure fleets are compliant with emission standards is placing an increasing financial burden on coach operators.

Electric vehicle range: At present electric coaches have a limited range and may require frequent charging stops. These vehicles are currently unsuitable for longer distance services or services to and from remote areas.

New technologies: Hydrogen coach technology is at a very early, exploratory stage. It has the potential to reduce some of the downsides of electric coaches (for example the shorter range, and the lack of storage for luggage due to the space taken up by the battery). There is political and environmental pressure to move to cleaner fuels urgently, and it is uncertain what alternative technologies and vehicles will be ready in time.

Lack of public charging infrastructure: There are limited charging points available which are suitable for electric coaches. There are significant barriers facing the roll-out of charging infrastructure nationally, but in particular for specialist heavy-duty vehicles and locations.

Charging infrastructure for coaches needs to be located in places where coaches are likely to be dropping off passengers and waiting (e.g. out-of-town coach parks). The infrastructure needs to be of the right type (for example fast or rapid) depending on the type of wait (e.g. service stations would require rapid for ultra-fast top up charging, whereas all-day coach parks could be suitable for fast charging as the vehicle can be parked for most of the day).

Installation of ‘at base’ charging facilities: In addition to public infrastructure limitations, operators will need to install charging infrastructure at their depots in order to charge vehicles overnight. While overnight charging poses fewer issues for the grid in terms of capacity (and is therefore less likely to require grid upgrades at that location), converting an entire fleet to electric could introduce a significant new pressure on the grid. In addition, many operators lease land and may face difficulties installing charging infrastructure due to land ownership.



Theme 3: Information & Passenger Experience

Identification of coach stops: Some coach stops lack visibility including a lack of signs and road markings. This may make the stop difficult to identify and use for passengers, and also presents safety concerns for drivers.

Passenger information: There is a poor or inconsistent amount of information for passengers at stops, most notably at smaller stops on street. Some stops have no branding or information at all. Others have ‘home-made’ posters put up by individual coach operators with information on the walking route through town to the ticket office. This information could be provided in a consistent and accessible format. In addition, tickets should be available online and, ideally, on board the service. Many of these innovations are already in progress, but these changes present real opportunities to improve the coach sector offer for passengers. There is often a lack of knowledge surrounding routes which have recently changed or have been cancelled, due to little publicity.

Online information on scheduled services is not all located in one place. Whilst National Express is the largest operator and does provide some information about local bus connections not operated by National Express, information about alternative coach operator services need to be found using other websites.

Ticketing: There is a reliance upon technology including QR codes to access details about services or purchase tickets which may provide benefits for some passengers with smartphones but could exclude others. Ticketing information should, as set out above, be provided in a consistent and straightforward way, with consideration made to accessibility requirements and ‘user experience’ principles.

There are no easy to view route maps available, similar to schematic network maps provided by rail operators, for the main scheduled service operators. Instead, web-based interactive maps are available which, on the one hand enable passengers to tailor the maps to show only the journey they are interested in, but on the other hand may be difficult to navigate for some and doesn’t allow the user to easily browse what services are available across the network so that journeys by more than one coach can be easily identified.

Accessibility: Coaches may be difficult to board and alight for some people – PSVAR compliance is not widespread but is improving.



Theme 4: Infrastructure & Facilities

Poor facilities: Many parking locations and service areas lack facilities for drivers and passengers. These locations can therefore feel unwelcoming and unsafe, with poor lighting and/or safety features. They can also be impractical, for example lacking shelter from the

weather, or information about amenities such as cafes or public toilets in the local area. Factors such as these contribute to a poor user experience and mean that using such facilities will be a 'last resort' for some passengers rather than a positive choice.

Accessibility: Coach facilities are often lacking investment and offering a poor quality of infrastructure, including lacking features that would make them more accessible for those with varying accessibility needs.

Parking provisions: There is a lack of affordable coach parking, notably within city centres and airports. This impacts on operator's margins for these trips, if they are forced to pay expensive rates for parking. In combination with potential CAZ charges and fuel price increases, some trips are becoming increasingly unprofitable for operators.

Inaccessible routes: Inaccessible roads cause further disconnect amongst existing remote communities, especially within coastal communities where deprivation continues to increase as a result of poor connectivity.

Lack of diversionary routes: Some diversionary routes across the region require improvement as they are not suitable for HGVs. This could cause delays across the network but could raise safety concerns if coaches use the unsuitable roads.

Bridge strikes: The South West has two of the twenty most struck bridges in Britain – in Wilton, Wiltshire and Twerton, Bath. Whilst there is no indication that these bridge strikes involve coaches, this causes substantial disruption to road and rail networks and requires better advanced signage and diversionary routes.



Theme 5: Fleets & Operational Efficiency

Cost of vehicles: Increasing costs and decreased availability of new and second-hand vehicles due to higher manufacturing costs and lack of availability of new vehicles. In addition, the introduction of CAZs in some region has reduced availability, and increased the cost, of 'CAZ compliant' vehicles.

Driver shortages: Driver shortages in the coach sector have increased significantly in recent times due to a combination of factors. The sector, heavily reliant on tourism, suffered during COVID. As a result, some drivers moved into less COVID-damaged sectors such as haulage, and also found that this type of work pays well without the added stress and distraction of customer interaction. This competition with the freight sector has led to a noticeable decline in coach drivers and some operators are finding that the services they can offer / jobs they can accept are limited by driver availability rather than other factors for the first time.

Career development and training: Limited options for career development affects recruitment and retention rates within the sector. In particular, small operators can struggle to offer the necessary training programmes or offer a wider range of experiences to drivers. The coach sector can struggle to recruit school leavers, who are not allowed to drive coaches for the first few years of their career. This can put off new recruits, as they cannot take on more interesting, longer-distance jobs.

Seasonal fluctuations: The seasonality of regional tourism creates inefficiencies in the sector, with significant peak and low seasons. Operators may struggle to keep drivers and vehicles in use if their business is too heavily reliant on seasonal work.

Driver's hours: Regulations surrounding driver's hours can affect operators' ability to forward plan services and react to unforeseen delays.

Driver shift patterns: Shifts are often unsociable and consist of long hours, which ultimately affects retention and recruitment rates. However, it is worth noting that these issues are also true of other driving sectors such as bus and haulage.

Fuel price increases: Many operators are struggling to cover their operational costs with some operators introducing premium prices to cover these losses, while others absorb the cost increase to remain competitive in the market.



Theme 6: Strategic Policy & Coordination

Post-COVID recovery: The UK new bus and coach market declined by -16.8% in 2021 as a direct result of Covid-19 restrictions. The South West region received 193 new vehicles in Q4 (2021) as a result of decreased ridership. Operators faced huge financial constraints which have affected ongoing operations. All operators have been hit hard by the Covid pandemic as in 2020 80% of operators have seen their turnover reduce by over 50%, and almost 20% of operators have seen theirs reduce by over 90%.

Complex and challenging government regulatory requirements: The regulatory environment for coaches is undergoing interventions which, although in the long-term provide beneficial modernisations and improvements for the sector, can be challenging and expensive for operators to react to. For example, the introduction of PSVAR and BODS regulations have meant significant vehicle updates and investments for most operators.

Clean Air Zones (CAZs): Charging CAZs impose additional costs to operators of noncompliant vehicles. Some zones offer funding for upgrading vehicles, but eligibility for this funding can be limited depending on a range of factors including business location, age of vehicle to be upgraded etc. Operators based outside a city region but using the city centre regularly for drop offs / pick-ups can find themselves with daily charges to pay and be ineligible for the financial support available. This can significantly increase operating costs, potentially making city centre trips unviable.

Smaller operators are hit hardest by these charges, since they are more likely to be operating older fleets, and have less access to financial mechanisms required to upgrade vehicles (e.g. vehicle finance). Even medium-sized operators may only be in the habit of replacing 1-2 vehicles a year; depending on the age of their overall fleet, CAZ requirements in the Western Gateway STB are likely to introduce a significant financial burden for some operators.

Inflation and cost of living: The coach sector is suffering alongside others from the considerable increases in fuel and energy costs. In addition, with spending power reducing, the sector may see a reduction in bookings for non-essential travel and trips.

Industry image: The industry is often undervalued and not prioritised within policy and planning and suffers from poor levels of investment. A lack of awareness and quality data to help convey and communicate the virtues of coach services and accessibility for customers may contribute to the undervaluing of the sector.

Lack of collaboration: There is often a lack of collaboration and collective planning amongst key stakeholders, as well as a lack of data exchange.

Chapter Summary

This chapter identified the key challenge themes and specific issues affecting the coach sector on both a national and regional scale. It identified that the majority of issues are felt

across the coach sector, both nationally and regionally. The six challenge themes which encompass the individual issues require varied interventions, with some requiring political and legislative changes. In contrast to others which require more engineering- based solutions, which can be seen within the Infrastructure and Facilities theme.

Within a regional context, key stakeholders like Bennetts Coaches, identified PSVAR and BODS as major issues for Western Gateway based operators. The following chapter was developed to implement the required solutions to address the issues.




Objectives and Interventions



8. Objectives and Interventions for the Western Gateway Coach Sector


This chapter sets out the objectives for the Western Gateway coach strategy, which in turn inform opportunities for policy recommendations and interventions. These have been identified in response to the challenges set out in the previous chapter.

The table below sets out recommendations for the WG Coach Strategy objectives, alongside a rationale for each. The table also provides a link back to the challenges by showing which challenge theme(s) each objective is responding to.

Table 11- Coach Strategy Objectives

Ref	Objective and Rationale
A	<p>Objective A: Improve urban and rural coach connectivity across the Western Gateway including potential new coach routes, increased service frequencies and better integration with other transport modes, to facilitate more sustainable travel and help achieve modal shift from private car.</p> <p>Why is this objective required?</p> <p>The evidence base has demonstrated that scheduled coach services already play an important role in connectivity settlements across the Western Gateway and further afield. It has also been highlighted that there are notable connectivity gaps where there are limited or no coach services, and in some cases these gaps are also poorly served by the rail network.</p> <p>The Midlands to South Coast multi modal corridor has been highlighted as a key corridor where passenger transport links are poor, although car travel demand is also not particularly high between some settlements.</p> <p>Coach should play an important role alongside buses, rail services, demand responsive transit and ‘first/last mile’ travel on foot or by bike in connecting settlements and providing a more sustainable alternative to driving a car.</p> <p>Which challenge theme(s) is this objective responding to?</p> 

B	<p>Objective B: Encourage consistent adoption of new technologies across the Western Gateway.</p> <p>Why is this objective required?</p> <p>The coach sector is lagging behind the bus sector in the adoption of EVs and other low emission vehicles. This is believed to be mainly due to the lack of Government funding aimed at encouraging the take-up of alternative fuelled coaches, compared to the assistance given to the bus sector. In addition, other technologies such as automation may offer potential to significantly reduce the cost of service delivery in longer term.</p> <p>Whilst this is not a Western Gateway-specific challenge, within the region there will be a need to work closely with operators to determine what obstacles they face; ensuring the right infrastructure is in place including charge points; and whether there are opportunities for incentives to accelerate adoption and for coordination with neighbouring STBs and organisations like National Highways to instigate change over a wider area (which is important given the fact that many coach services travel long distances beyond the Western Gateway STB boundary).</p> <p>The adoption of electric and/or hydrogen coaches will contribute towards achieving net zero and improving local air quality.</p> <p>Which challenge theme(s) is this objective responding to?</p> 
C	<p>Objective C: Develop easier and more seamless access to information about services, purchasing tickets and accessing coach services to make coaches a more attractive and inclusive mode of transport.</p> <p>Why is this objective required?</p> <p>There have been improvements to the availability and quality of information available to passengers on operator websites, however the coach network is less integrated than the local bus networks and national rail network. For passengers wanting to make a seamless journey within or into/out of the Western Gateway by both a coach and another mode, it may be difficult to obtain all the information needed in one place.</p> <p>Because they are more infrequent and don't stop at many places, scheduled coach services are not particularly visible and do not typically provide a 'turn-up-and-go' service, therefore it is particularly important that clear information is readily available, whether it is published online or via signage at stops and interchanges.</p> <p>The ability of passengers of all abilities to comfortably board and alight coach vehicles and interact with coach drivers and staff is also extremely important and improvements could make coach travel more inclusive which will increase travel options for people.</p> <p>Which challenge theme(s) is this objective responding to?</p>  

D	<p>Objective D: Improve coach stops, interchanges, drop-off and layover parking facilities, including better facilities for drivers, making them more attractive places to wait, rest and interchange.</p> <p>Why is this objective required? All types of coach services use a variety of stops, drop off points, interchange and longer-term layover parking locations.</p> <p>For coach drivers, these facilities present the important opportunity to rest after a long journey. It is important therefore that good quality facilities are available which are easy to access including toilets. It is also important to consider the availability of appropriate charging infrastructure ahead of need. The evidence base has indicated that the availability of facilities varies and that some layover parking facilities are located in remote areas.</p> <p>For passengers, the design, layout and general ambience of stops and interchanges could enhance the experience of travelling by coach, and the evidence base case studies have demonstrated that facilities vary significantly in quality, and that the quality of facilities do not necessarily increase in proportion to the number of coach services or level of passenger demand.</p> <p>Which challenge theme(s) is this objective responding to?</p> 
E	<p>Objective E: Increase engagement and encourage more coordinated and transparent decision-making and action across the region to support the long-term resilience and vitality of the region's coach sector.</p> <p>Why is this objective required? Change cannot happen without coordination between the different stakeholders. Coach operators, both small and large, locally based and those based further afield but with a vested interest in the region, should have the ability to raise concerns, share knowledge and participate in initiatives which lead to improvements which benefit all types of coach services.</p> <p>Whilst it is clearly evident that organisations like CPT play a very important role in raising the profile of the coach sector nationally and regionally, there would be benefit in further integration of discussions concerning the coach sector with operators alongside local authorities and potentially other transport bodies including the rail and bus sectors, to ensure more joined-up decisions are made.</p> <p>Which challenge theme(s) is this objective responding to?</p> 

These objectives are closely aligned with the objectives set out in the Western Gateway STB Strategic Transport Plan (as originally discussed in Chapter 4) as demonstrated in the next figure.

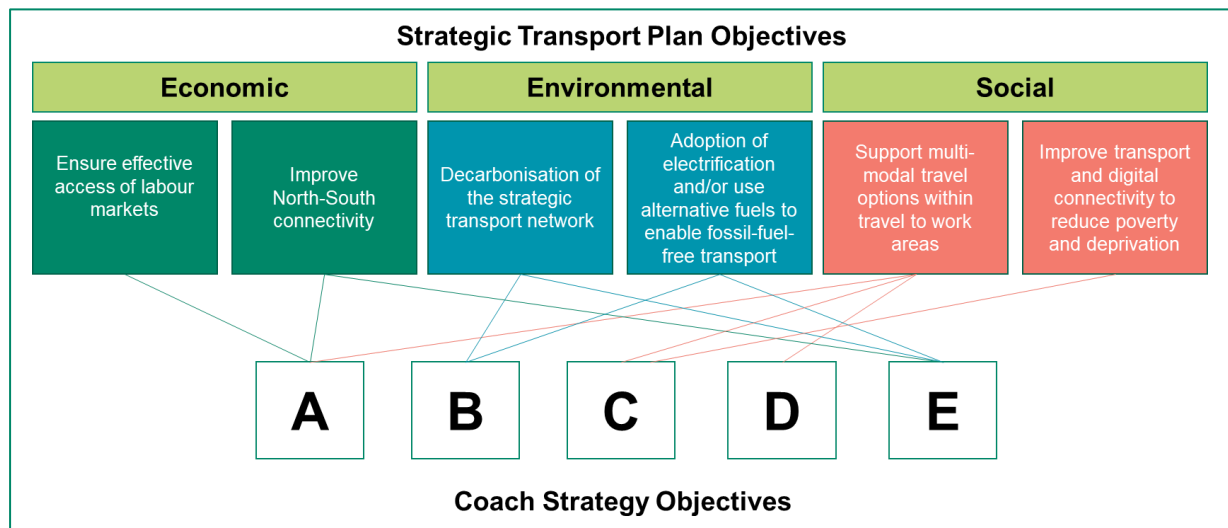


Figure 36 - Alignment between the Coach Strategy and Western Gateway STB Strategic Transport Plan Objectives

This also demonstrates that the Coach Strategy's objectives will also contribute towards the delivery of long-term outcomes and delivery priorities which are aligned with the Strategic Transport Plan's objectives, as shown in Table 3 of this report.

Recommended Interventions

The interventions set out in this chapter are an initial recommended list which have been devised prior to discussion with local stakeholders.

The types of interventions fall broadly into the following categories:

- **Services** – specifically changes to existing coach service routes or the creation of new services, notably scheduled services.
- **Infrastructure** – improvements to stops, interchange, drop-off and layover parking facilities, including those which primarily benefit passengers and those aimed at coach drivers, and used by scheduled, leisure/private hire and education coach services.
- **Initiatives** – other initiatives including further studies, forums for discussion and joint decision making, marketing and information on coach services including ticketing.

Table 12 presents the interventions which address the challenges using themes discussed in Chapter 7. Each intervention has a brief description and outlines which service type it will address (Scheduled, Education and Leisure/ Private tours).

The **Infrastructure and Facilities** theme offers more engineering-based solutions, including improved parking facilities for drivers and passengers. As opposed to the **Strategic Policy and Coordination** theme, where its interventions directly aim to address issues related to legislation such as PSVAR.


The majority of interventions listed within the **Connectivity** theme offer solutions to issues facing scheduled services. This includes the implementation of three new scheduled coach services, each of which would address a strategic gap within the region.


The interventions within the **Decarbonisation** theme offer solutions to issues facing all service types, focusing on the transition to electric vehicles and the funding and processes required.



The interventions within the theme of **Fleets and Operational Efficiency** address ongoing issues related to driver shortages and improving network resilience within the region. Each intervention within this theme addresses all three service types.


Interventions within the **Passenger and Experience** theme address key issues related to passenger information and ticketing. These solutions address ongoing issues including a lack of service information and accessibility.


Table 12 - Coach Strategy Interventions

Theme	Proposed Intervention or Policy	Description	Service type affected
	C1: Explore collaboration between coach companies to service hard to reach areas.	Inaccessible roads and challenges navigating rural lanes serving remote communities is a key issue; especially where there are pockets of deprivation (coastal communities especially) and rising travel demand wanting good connectivity.	Scheduled
	C2: Work with operators to understand future opportunities for coach travel	Collaborating with operators would provide valuable insights into the coach sector, guiding and improving future operations	Scheduled Leisure/ Private Tours Education
	C3: New scheduled coach service addressing a strategic gap (1): South Coast to Central Route	Bournemouth/Poole/Christchurch-Blandford Forum-Shaftesbury-Warminster-Frome-Bath-Bristol (approx. 68 miles)	Scheduled
	C4: New scheduled coach service addressing a strategic gap (2): Gloucestershire to Bristol Airport Link	Cheltenham-Gloucester-Stroud-Wotton under Edge-Thornbury-Bristol > Bristol Airport (approx. 50 miles)	Scheduled
	C5: New scheduled coach service addressing a strategic gap (3): Gloucestershire to South Coast Route	Cheltenham-Cirencester-Tetbury/Malmesbury-Chippenham-Melksham-Trowbridge > towards Bournemouth/Poole/Christchurch (95 miles)	Scheduled

Theme	Proposed Intervention or Policy	Description	Service type affected
	C6: New calling points/interchanges on existing or new routes, , such as strategic locations including Cribbs Causeway, additional rural calling points (rural mobility hubs) and parkway interchanges near motorway interchanges on the edges of urban areas.	<p>There is not considered to be significant scope to add additional calling points on existing services as this will add to journey times, however strategic locations which attract trips such as Cribbs Causeway could be suitable hubs for some inter-urban coach services running into Bristol from the M5 (Midlands) and M4 (Wales) corridors.</p> <p>Enhancement to the UWE Frenchay campus interchange, or the creation of a sister facility closer to Bristol Parkway station could also be considered.</p> <p>Additional calling points serving large rural areas (e.g. Rural Mobility Hubs) could be considered to avoid diverting coaches away from the shortest/quickest and most efficient route. Potential parkway interchanges at or close to key motorway junctions or on the edges of urban areas could also be considered.</p>	Scheduled
	D1: Baselineing carbon impact & setting a Carbon Management Plan for the sector / region	Baseline the carbon impact of the coach fleet.	Scheduled Leisure/ Private Tours Education
	D2: Assist with identification of opportunities for funding for EV trials/hires.	Purchase 'test/trial' EVs to loan out to operators (NB: not sure how charging would work) – given positive experience of Bennett's and their drivers...could be a focus on school services?	Leisure/ Private Tours Education
	D3: Assist with identification of opportunities for funding to support upgrades to cleaner vehicles.	Seek funding to support uptake of Low Emission, ZEC or (ideally) Zero Emission coaches.	Leisure/ Private Tours Education
	D4: Support / facilitate development of a network of alternative fuel charging / stations.	Propose investigation of a strategic network of alternative fuel charging / stations. Investment and development of new sites could be led by private sector partners.	Scheduled Leisure/ Private Tours Education

Theme	Proposed Intervention or Policy	Description	Service type affected
 	D5: Decarbonisation marketing campaign promoting zero-emission alternatives to the industry.	Implement a strategy around the environmental benefits of coach use over other modes (e.g. car), highlighting existing services that could replace some car trips.	Scheduled Leisure/ Private Tours Education
	D6: Review suitability of technologies from trials and their potential for the South West on an ongoing basis.	Presenting the South West Region as an area that is open to trialling innovative, yet workable solutions. The region is bypassed currently but would benefit from investigating autonomous technologies and alternative fuels.	Scheduled Leisure/ Private Tours Education
	I1: Improve ticketing experience by providing online/app-based payment options	Cashless payments using apps and online services have increased over recent years. Offering passengers real time tracking tools and faster boarding times. Go South Coast estimate that 6065% of passengers used contactless payments and have seen spikes in rural areas which may be due to bank closures.	Scheduled
	I2: Live service information (online/app-based) and improve at-stop service information alongside	There is a need to improve both live and at-stop service information for passengers. This will improve knowledge and confidence in using coach services	Scheduled
	I3: Improve branding of services at stops/drop-offs, and wayfinding for travel connections and onward journeys	There is a need to improve information and branding of services as shown in Appendix G.	Scheduled
	F1: Promote resources and training to help operators avoid bridge strikes.	The South West has two of the twenty most struck bridges in Britain – in Wilton, Wiltshire and Twerton, Bath. This causes substantial disruption to road and rail networks and requires better advanced signage and diversionary routes. Some coaches are double-decks.	Scheduled Leisure/ Private Tours Education
	F2: Improve experience at off-street & on-street stops and drop off points by providing weather shelter	There are a lack of stops which provide passengers with adequate shelter throughout the region (shown in Appendix G).	Scheduled Leisure/ Private Tours

Theme	Proposed Intervention or Policy	Description	Service type affected
			Education
	F3: Improve safety and security at off-street & on-street stops and drop off by investing in lighting, CCTV and 'help points'	There is an increasing need to improve safety and security features across the region. Improving lighting, CCTV and help points will make passengers feel safer and more likely to use bus and coach services.	Scheduled
	F4: Support for infrastructure improvements and investment where suitable.	This is to include engagement with key coach companies and stakeholders, looking into legislation that encompasses a change to roads, facilities, and coach services.	Scheduled Leisure/ Private Tours Education
	F5: Review of current coach stop, drop-off and parking facilities in the South West	The quantity and locations of coach facilities is highly relevant to cater for long distance trips. In response to the geography of the region the distances between suitable rest areas can be long. The aim is better visibility and consistent quality of existing coach facilities	Leisure/ Private Tours Education
	F6: Support improvements to strategically important roads that require better journey time reliability.	There are several A roads (A30, A37, A303, A36, A350, A417) acting as vital arteries across the region serving local and regional coach travel but many of these are slow routes.	Scheduled Leisure/ private tours
	O1: Review of current driver training and explore options for improvement	Many operators are responsible for providing driver training. This is a costly process which often contributes to unproductive time.	Scheduled Leisure/ Private Tours Education
	O2: Assist with targeted recruitment campaigns for the coach industry.	Recruiting and retaining employees and tackling existing issues within the industry. This also includes upskilling for new careers in emerging technologies and coach driving.	Scheduled Leisure/ Private Tours Education

Theme	Proposed Intervention or Policy	Description	Service type affected
	O3: Promote solutions to driver shortages.	A national issue that has manifested over time due to multiple factors including poor perceptions of the industry. The current situation is a trigger for mode shift and forging a complementary coach service. More driver training courses could help.	Scheduled Leisure/ Private Tours Education
	O4: Promoting suitable alternative routes in the event of adverse weather.	Network resilience is a particularly acute challenge, having implications on coach service flows and reliability, especially in the absence of diversionary routes.	Scheduled Leisure/ Private Tours Education
	S1: Agree the role of Subnational Transport bodies and local highway authorities with regards to the coach industry.	Governance systems and responsibilities to be agreed prior to delivery of other actions/interventions. Lack of awareness and knowledge of STBs role in shaping the coach industry. There is difficulty understanding and defining its purpose alongside other actors.	Scheduled Leisure/ Private Tours Education
	S2: Improve data collection so that problems with services can be more easily identified and evidence for opportunities to improve is readily available	Need to collect and share data from scheduled services to identify and rectify issues.	Scheduled
	S3: Assist operators with PSVAR legislation	Continued extensions surrounding PSVAR compliance has caused issues for operators. Many have heavily invested in compliant vehicles and retrofitting. Despite this, operators using non -compliant vehicles are often awarded contracts due to the ongoing extensions.	Scheduled Leisure/ Private Tours Education
	S4: Assist operators with BODS legislation	Continued uncertainty surrounding BODS implementation causes significant issues for operators. Especially, surrounding Home to School services, some of which are now required to be compliant.	Scheduled Education

Theme	Proposed Intervention or Policy	Description	Service type affected
	S5: Support/deliver a passenger awareness campaign for coach services incl. opportunities for different user groups.	Lack of awareness and quality data to help convey and communicate the virtues of coach services and accessibility for customers.	Leisure/ Private Tours
	S6: Establish and promote a South West Coach Sector Steering Group.	The lack of insight, information (data) exchange and collective planning between key strategic decision makers and coach companies could be improved by having regular dialogue.	Leisure/ Private Tours Education
	S7: Partnership working with stakeholders to promote South West priorities.	This will include collaboration with a number of bodies such as National Express, local coach teams, other major coach companies, councils, Sub-National Transport Bodies, local government and the Department for Transport. This will enable a joined-up approach to help promote coach services in the South West.	Scheduled Leisure/ Private Tours Education

The following figures present indicative routeings of potential new/enhanced coach service corridors which have been identified through the analysis of existing services and mode comparison. This analysis is set out in Chapter 6 and uses data presented across Appendices B-F and summarised in Appendix H.

Appendix H includes a table for each strategic gap showing the current estimated car demand (as a broad indication of the potential level of demand for a new coach service), the distance between origins / destinations and current mode availability (direct services only). Key settlements along each route are assigned 'trip attractor ratings' as a quick guide to the likely demand concentrations.

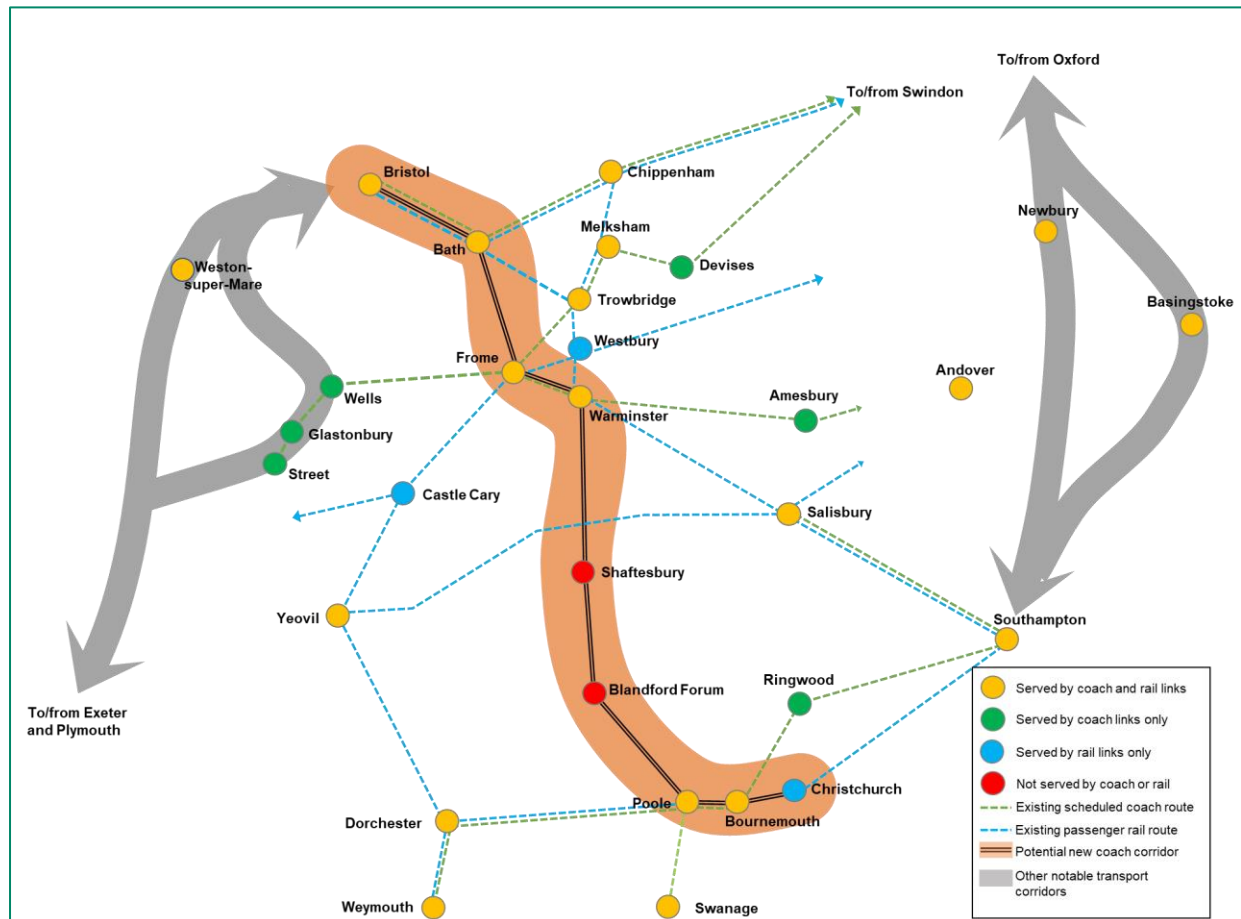


Figure 37 - New scheduled coach service addressing a strategic gap (1)

As shown in Figure 37, a new coach service route linking the Bournemouth/ Poole/ Christchurch conurbation with Bath and Bristol would fill a strategic gap in current public transport provision. The alternative rail routes are in-direct and would require routeing either to the west via Dorchester and Yeovil, or to the east via Southampton and Salisbury.

Bristol/Bath to Bournemouth is the missing link and mirrors the old Somerset & Dorset railway which was closed in 1966. The A350 corridor in general is poorly served by public transport. Routeing via the A36, A350 and A354 for much of the way would keep the coach on main roads, albeit mostly single carriageway and not particularly fast. The journey time from Shaftesbury to Bath direct is just over the hour without stops therefore minimising the deviation of coach services to link with some minor towns is important. By serving Frome and Warminster it would only add 20 minutes to the overall journey.

It should be caveated that many settlement pairs along this corridor do not generate very high levels of car demand, suggesting there would not be a case for a higher-frequency service, however there is potential for modal shift and reduce congestion (probably to a very small extent) at pinch-points along the A350, A354 and A36. In addition, the southern part of the A350 has specific challenges which mean it may be unsuitable for strategic movement, particularly by large vehicles. All routes suggested at this early stage would, of course, be subject to significant feasibility work.

By serving settlements with a high concentration of university students (Bournemouth, Bath and Bristol), this could generate demand for services, and especially given there is not a direct rail alternative.

The service corridor would provide an inter-urban public transport link in the small settlements of Shaftesbury and Blandford Forum which are currently not served by coach or rail. These settlements could act as rural mobility hubs for the surrounding area, with local bus services, demand responsive transit and active travel networks providing the feeder links into the coach service. Given these are small settlements are bypassed (Blandford Forum) or traversed (Shaftesbury) by the A354/A350, there would not be significant diversions or delays therefore maintaining reasonable journey times.

Alternatively, a smaller diversion into the Tesco Supermarket at Blandford Forum (which has a turnaround and bus stop) as an edge-of-town interchange hub could also help to minimise additional journey time that would otherwise be incurred in services routed through the town centre, although it would make services more difficult to access from all parts of the town.

The service may be attractive to commuters and business travellers, although it is unlikely that demand would sustain a high frequency. The service may therefore be more attractive to irregular users of coach services, including students and leisure travellers.

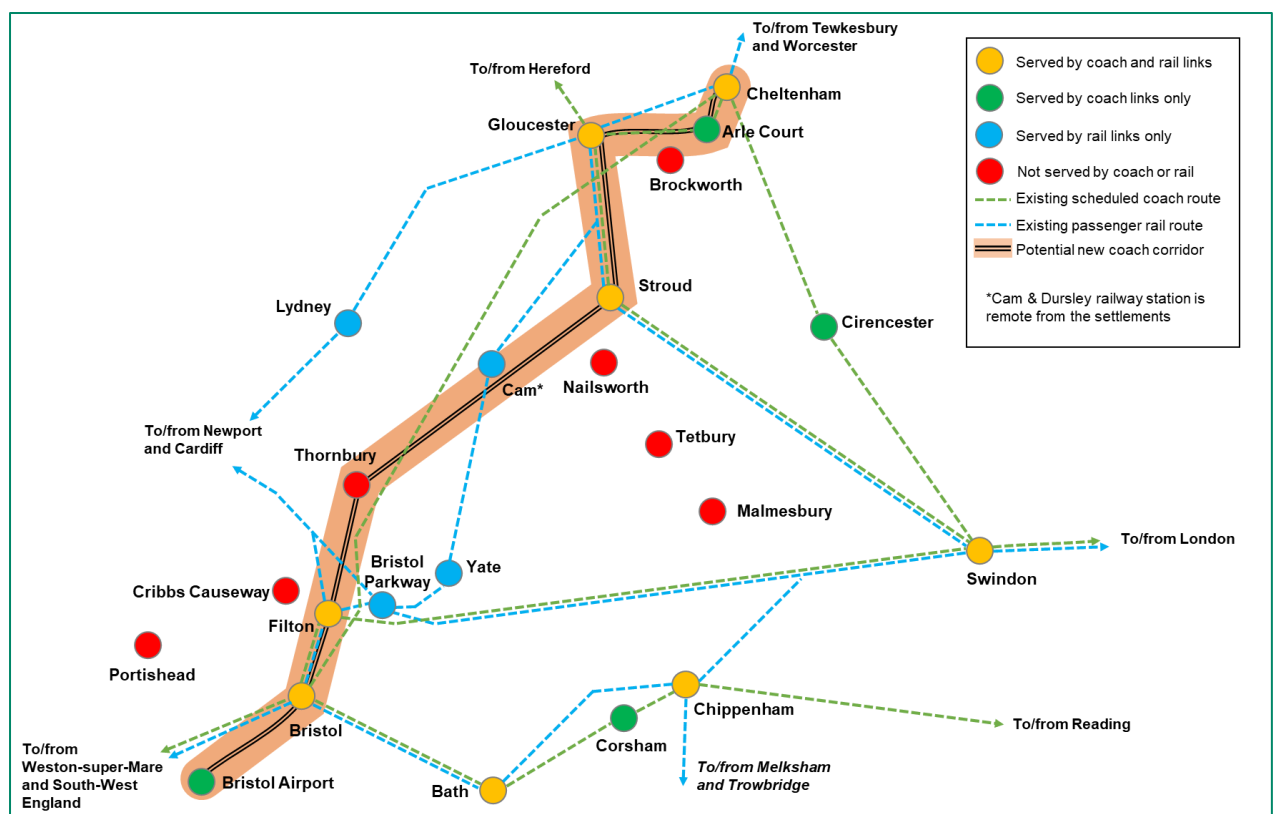


Figure 38 - New scheduled coach service addressing a strategic gap (2)

As depicted in Figure 38, a second potential coach service route option would be between Cheltenham/Gloucester and Bristol but in particular serving intermediate journeys that are poorly served by direct public transport links, these being Stroud-Bristol (moderate-high levels of car demand), Thornbury-Gloucester (moderate-high levels of car demand), Stroud-Thornbury (moderate levels of car demand) and Wotton-under-Edge-Bristol (High levels of car demand). It is noted that a new railway station is proposed at Charfield near Wotton-under-Edge and that this may negate the need for a new coach service through this area. Alternatively, the service could utilise a section of the M5 and A38 between Stroud and Thornbury, potentially making additional calling stops at smaller communities such as Stone and Falfield.

There could also be opportunity for services to link into important concentrations of employment across the north of Bristol, either by routing via the University of the West of England Frenchay Campus (which has a bus/coach interchange) and/or via other centres, potentially establishing a new coach stop at Cribbs Causeway (utilising the existing bus interchange) or routing via Bristol Parkway station which is 1.5km north of the UWE campus.

Although it has not been possible to determine this from the data analysis undertaken, there may also be potential to extend service on to Bristol Airport, which has poor connectivity to settlements north of Bristol.

Unlike Strategic Gap 1, this route option may be more attractive to commuters as well as students and leisure travellers. There may be sufficient demand to justify a more frequent service or operating in the early morning and evenings.

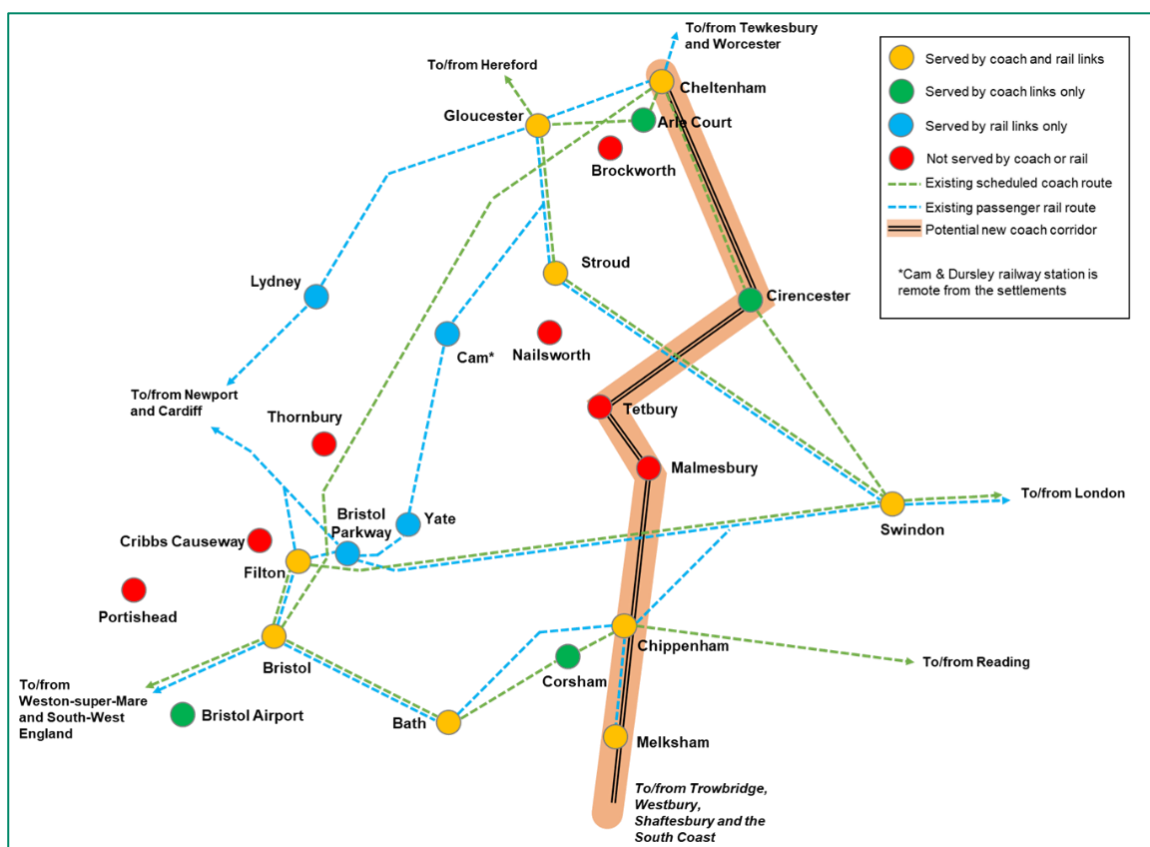


Figure 39 - New scheduled coach service addressing a strategic gap (3)

A strategic gap has been identified between Cheltenham and Bournemouth, with the northern section shown in Figure 39. Some sections are served by rail and by coach (including Cheltenham-Cirencester). Smaller settlements that are currently poorly served by public transport like Malmesbury could act as rural mobility hubs to enable people to access coach services using local transport links and active travel routes. At the southern end, as an alternative to routing towards Bournemouth, some or all services could instead link to Dorchester and Weymouth via Blandford Forum.

An alternative to the route shown would be to route services via Bath, therefore capturing another major attractor location and potentially increasing passenger demand.

As with strategic gap 1, it should be caveated that many settlement pairs along this corridor do not generate very high levels of car demand, suggesting there would not be a case for a higher-frequency service, however there is potential for modal shift. This service may be more attractive to students and leisure travellers as opposed to commuters.

The three suggested service routes, as well as potential additional calling points on existing services, would address key connectivity gaps across the STB area. However, it is recommended that more detailed investigations are undertaken to determine the type of coach service needed, who they would be marketed towards and ultimately, in discussion with potential operators of these services, whether there is a sufficient market to sustain these services.

Services could be geared towards commuters and business travellers (potentially strategic gap 2), or to students and leisure travellers, or a mixture (strategic gaps 1 and 3). This could influence the business model, the calling points, frequency of service, type/specification of vehicle, branding/marketing strategy and fares.

Also, as with all coach services, it will be important for any improvements to coach service routes to be fully integrated with other transport services and links, so there will need to be a focus on how to achieve better integration across the STB area (including physical infrastructure such as stops/interchanges as well as ticketing) and in a variety of settings, whether these are in city centres, at major employment, retail or international gateway hubs, or in more rural settings which could present significant challenges especially in the more remote areas of the Western Gateway.

Multi-Criteria Assessment

To provide a steer as to the appropriateness and prioritisation of the recommended interventions, a simple multi-criteria assessment (MCA) has been constructed.

This provides a high-level and visual summary of how well the proposed interventions align to the Coach Strategy objectives. It also sets out indicative orders of cost, perceived level of complexity for delivering each intervention and envisaged timescales for bringing forward interventions.

This initial overview can then be used to develop a list of 'quick wins' and more intensive projects or programmes that will require more detailed investigation e.g. feasibility studies.

It is considered that interventions related to the Strategic Policy and Coordination theme should be prioritised as these will seek to clarify and establish the priorities for investment and improvements, governance structures and the funding landscape, all of which need to be coordinated by the public sector in discussion with the coach sector and other key stakeholders.

Table 13 Multi-Criteria Assessment – Overview

ID	Intervention Description	Type of Intervention (services infrastructure initiatives)	Coach Service Type (scheduled private education)	Objectives (alignment highlighted)					Cost £ ££ £££	Timescales (years) Short term (<5) Medium term (5-10) Long term (>10)	Complexity Low Medium High	Governance & Responsibility
				A: Improve urban and rural coach connectivity across the Western Gateway [...]	B: Encourage consistent adoption of new technologies across the Western Gateway	C: Develop easier and more seamless access to information [...] to make coaches a more attractive and inclusive mode of transport.	D: Improve coach stops, interchanges, drop-off and layover parking facilities, including better facilities for drivers [...]	E: Increase engagement and encourage more coordinated and transparent decision-making and action across the region [...]				
C1	Explore collaboration between coach companies to service hard to reach areas	Initiative	Scheduled	✓		✓	✓	✓	££	Short-Medium Term	Low-Medium	WGSTB, Local Authorities/WECA, Coach Operators
C2	Work with operators to understand future opportunities for coach travel	Initiative	Scheduled Private Education	✓		✓	✓	✓	£	Short Term	Low-Medium	WGSTB, Local Authorities/WECA, Coach Operators
C3	New scheduled coach services to address identified strategic gap (1)	Service	Scheduled	✓		✓	✓		£££	Medium-Long Term	Medium	WGSTB, Local Authorities/WECA, Coach Operators
C4	New scheduled coach services to address identified strategic gap (2)	Service	Scheduled	✓		✓	✓		£££	Medium-Long Term	Medium	WGSTB, Local Authorities/WECA, Coach Operators
C5	New scheduled coach services to address identified strategic gap (3)	Service	Scheduled	✓		✓	✓		£££	Medium-Long Term	Medium	WGSTB, Local Authorities/WECA, Coach Operators
C6	New calling points/interchanges on existing or new routes	Infrastructure	Scheduled	✓			✓		££	Medium Term	Low-Medium	WGSTB, Local Authorities/WECA, Coach Operators
D1	Baselining carbon impact & setting a Carbon Management Plan for the sector / region	Initiative	Scheduled Private Education		✓			✓	£	Short Term	Medium	WGSTB, Local Authorities/WECA, Coach Operators, DfT, CPT-UK
D2	Assist with identification of opportunities for funding for EV trials/hires	Initiative	Private		✓				£	Medium Term	Medium	WGSTB, Local Authorities/WECA, Coach Operators, DfT
D3	Assist with identification of opportunities for funding to support upgrades to cleaner vehicles	Initiative	Scheduled Private Education		✓				£	Medium Term	Medium	WGSTB, Local Authorities/WECA, Coach Operators, DfT
D4	Support / facilitate development of a network of alternative fuel charging / stations.	Infrastructure	Scheduled Private Education		✓				£££	Medium-Long Term	High	WGSTB, Local Authorities/WECA, DfT, CPT-UK
D5	Decarbonisation marketing campaign promoting zero-emission alternatives to the industry.	Initiative	Scheduled Private Education		✓			✓	£	Medium Term	Low	WGSTB, Local Authorities/WECA, CPT-UK
D6	Review suitability of technologies from trials and their potential for the South West	Initiative	Scheduled Private Education		✓				££	Short Term	Medium-High	WGSTB, Local Authorities/WECA
I1	Improve ticketing experience by providing online / app-based payment options	Service	Scheduled			✓			££	Short-Medium Term	Medium	WGSTB, Local Authorities/WECA, Coach Operators
I2	Live service information (online / app-based) and improve at-stop service information alongside	Service	Scheduled			✓			££	Short-Medium Term	Medium	WGSTB, Local Authorities/WECA, Coach Operators
I3	Improve branding of services at stops / drop-offs, and wayfinding for travel connections and onward journeys	Service	Scheduled			✓			££	Medium Term	Low-Medium	WGSTB, Local Authorities/WECA, Coach Operators

ID	Intervention Description	Type of Intervention (services infrastructure initiatives)	Coach Service Type (scheduled private education)	Objectives (alignment highlighted)					Cost £ ££ £££	Timescales (years) Short term (<5) Medium term (5-10) Long term (>10)	Complexity Low Medium High	Governance & Responsibility
				A: Improve urban and rural coach connectivity across the Western Gateway [...]	B: Encourage consistent adoption of new technologies across the Western Gateway	C: Develop easier and more seamless access to information [...] to make coaches a more attractive and inclusive mode of transport.	D: Improve coach stops, interchanges, drop-off and layover parking facilities, including better facilities for drivers [...]	E: Increase engagement and encourage more coordinated and transparent decision-making and action across the region [...]				
F1	Promote resources and training to help operators avoid bridge strikes.	Initiative	Scheduled Private Education					✓	£	Short Term	Low	WGSTB, Local Authorities/WECA, Coach Operators, CPT-UK
F2	Improve experience at off-street & on-street stops and drop off points by providing weather shelter	Infrastructure	Scheduled Private Education				✓		££	Short-Medium Term	Medium	WGSTB, Local Authorities/WECA
F3	Improve safety and security at off-street & on-street stops and drop off by investing in lighting, CCTV and 'help points'	Infrastructure	Scheduled Private Education				✓		££	Short-Medium Term	Medium	WGSTB, Local Authorities/WECA
F4	Support for infrastructure improvements and investment where suitable	Infrastructure	Scheduled Private Education	✓					£££	Medium-Long Term	Medium	WGSTB, Local Authorities/WECA, DfT
F5	Review of current coach parking facilities in the South West	Infrastructure	Scheduled Private Education				✓		££	Short Term	Medium	WGSTB, Local Authorities/WECA
F6	Support improvements to strategically important roads that require better journey time reliability.	Infrastructure	Scheduled Private Education	✓				✓	£££	Medium-Long Term	Medium-High	WGSTB, Local Authorities/WECA, DfT
O1	Review of current driver training and explore options for improvement	Initiative	Scheduled Private Education					✓	£	Short Term	Low	WGSTB, Local Authorities/WECA, Coach Operators, CPT-UK
O2	Assist with targeted recruitment campaigns for the coach industry.	Initiative	Scheduled Private Education					✓	£	Short Term	Low	WGSTB, Local Authorities/WECA, Coach Operators, CPT-UK
O3	Promote solutions to driver shortages.	Initiative	Scheduled Private Education					✓	£	Short Term	Low	WGSTB, Local Authorities/WECA, Coach Operators, CPT-UK
O4	Promoting suitable alternative routes in the event of adverse weather.	Initiative	Scheduled Private Education					✓	£	Short Term	Low	WGSTB, Local Authorities/WECA, Coach Operators, CPT-UK
S1	Agree the role of Subnational Transport bodies and local highway authorities with regards to the coach industry.	Initiative	Scheduled Private Education					✓	NA	NA	NA	WGSTB, Local Authorities/WECA, National Government
S2	Improve data collection so that problems with services can be more easily identified and evidence for opportunities to improve is readily available	Initiative	Scheduled					✓	££	Short Term	Low-Medium	WGSTB, Local Authorities/WECA, Coach Operators, CPT-UK
S3	Assist operators with PSVAR legislation	Initiative	Scheduled Private Education					✓	£	Short Term	Medium	WGSTB, Local Authorities/WECA, Coach Operators, CPT-UK, DfT
S4	Assist operators with BODS legislation	Initiative	Education					✓	£	Short Term	Medium	WGSTB, Local Authorities/WECA, Coach Operators, CPT-UK, DfT

ID	Intervention Description	Type of Intervention (services infrastructure initiatives)	Coach Service Type (scheduled private education)	Objectives (alignment highlighted)					Cost £ ££ £££	Timescales (years) Short term (<5) Medium term (5-10) Long term (>10)	Complexity Low Medium High	Governance & Responsibility
				A: Improve urban and rural coach connectivity across the Western Gateway [...]	B: Encourage consistent adoption of new technologies across the Western Gateway	C: Develop easier and more seamless access to information [...] to make coaches a more attractive and inclusive mode of transport.	D: Improve coach stops, interchanges, drop-off and layover parking facilities, including better facilities for drivers [...]	E: Increase engagement and encourage more coordinated and transparent decision-making and action across the region [...]				
S5	Support/deliver a passenger awareness campaign for coach services incl. opportunities for different user groups.	Initiative	Private			✓		✓	£	Short Term	Low	WGSTB, Local Authorities/WECA, Coach Operators, CPT-UK
S6	Establish and promote a South West Coach Sector Steering Group.	Initiative	Scheduled Private Education					✓	£	Short Term	Low	WGSTB, Local Authorities/WECA, Coach Operators, CPT-UK
S6	Establish and promote a South West Coach Sector Steering Group.	Initiative	Scheduled Private Education					✓	£	Short Term	Low	WGSTB, Local Authorities/WECA
S7	Partnership working with stakeholders to promote South West priorities.	Initiative	Scheduled Private Education					✓	£	Short Term	Low	WGSTB, Local Authorities/WECA, Coach Operators, CPT-UK

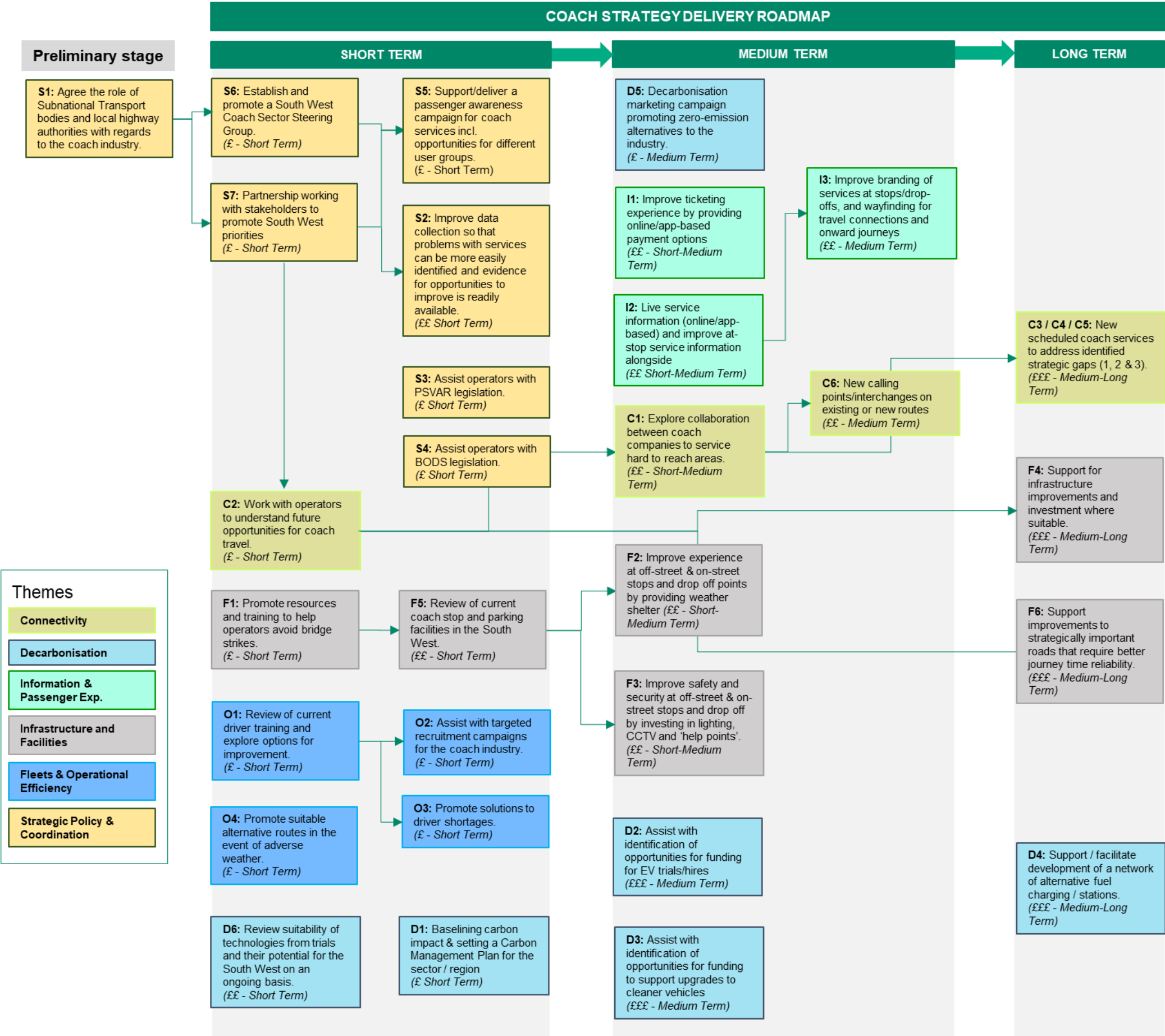
Intervention Roadmap

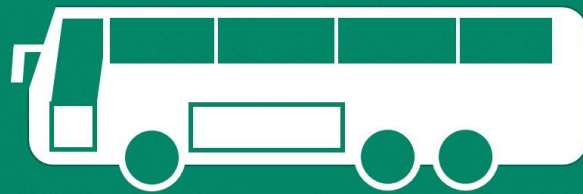
Using the challenges identified in Chapter 7, this chapter has identified the key objectives of the Coach Strategy and the required interventions needed to achieve them. The objectives presented in Table 11 address both the challenge themes and the Strategic Transport Plan Objectives from the Western Gateway STB Strategic Transport Plan. The interventions listed in Table 12 provide targeted solutions to address the key issues facing the Coach Sector. The new scheduled coach services (Figure 37, Figure 38, Figure 39) address the physical disconnections across the Western Gateway which are identified in Appendix C.

These proposed interventions have been presented visually on the next page, to show what a delivery roadmap might look like.

Once the roles of the governance organisations have been agreed (S1) during a preliminary stage, delivery of other interventions and policies could commence. Delivery is organised into short term, medium and long-term periods.

Figure 40 Coach Strategy Intervention Delivery Roadmap





Next Steps

9. Next Steps

This chapter proposes some next steps following the production of this strategy. Producing this document has highlighted that the coach sector suffers from significant data gaps compared to other transport modes in the UK. Some suggested proposals to address this are provided here.

Passenger experience survey

It would be beneficial to conduct a passenger experience survey for coach users. It would present important data on user demographics and journeys. In turn, the data could guide future interventions, monitor progress and influence future decision making.

Further engagement with operators

Conducting further engagement with coach operators would guide future interventions surrounding career development and recruitment. Regular engagement with operators would also be beneficial to gather feedback on current issues and in ensuring an open dialogue with wider stakeholders.

Lack of data on coaches

Conducting further research into the number, type and age of coaches operating in the South West. This could involve analysis of the Traffic commissioner data as suggested by the Confederation of Passenger Transport (CPT). It would be useful to extend the coach strategy to cover the Peninsula Transport area as those coaches need to travel through the Western Gateway area to reach many destinations.

Investigation into coach parking across the South West

A recent national survey into lorry parking has been completed for DfT showing there is a national shortage of spaces. It would be useful to complement this with a similar exercise to establish the number of coach spaces available at MSAs and other facilities. There may be scope for recommending flexibility in allocation of spaces depending on time of day and day of week. At the same time, it is useful to examine the type of facilities.

The North – South road network other than M5 is poor

Consider the implications of the National Highways M4 to South Coast report that is due to be published in 2023 and see if there are suggested infrastructure improvement that could help facilitate shorter journey times on these core routes, both scheduled and charters.

