Coach Strategy (Phase 3) Feasibility Study - Strategiconal.co.uk Gaps 1 & 3

NI

Lulu

m

Illing

(80)

mulu

(1)

ANGLES

Western Gateway Sub National Transport Body

March 2025

BATH

TOP UP WITH TAP WATER UN Luin





AECOM

Quality information

Prepared by		Checked by		Verified by		Approved by	
Jolyon Winkler Consultant (AECOM)		Adam Bardsley Senior Consultant (AECOM)		Simon Willison Associate Director (AECOM)		Simon Willison Associate Director (AECOM)	
Revision H	istory Revision (date	Details	Authorized	Name	Position	

Prepared for:

Western Gateway Sub National Transport Body

Prepared by:

Simon Willison Associate Director E: simon.willison@aecom.com

AECOM Limited Marlborough Court 10 Bricket Road St Albans AL1 3JX United Kingdom

T: +44(0)1727 535000 aecom.com

© 2025 AECOM Limited. All Rights Reserved.

Executive Summary

Background

The Western Gateway Sub-National Transport Body (STB) published its Coach Strategy in August 2023¹. Its purpose is to capture the current state of play for the different types of coach services operating across the STB region² and to identify future improvements.

The strategy identified three transport corridors, strategic gaps as they are referred to, where there could be opportunities to enhance scheduled coach services to provide better public transport connectivity between the region's larger settlements and through rural communities. Strategic Gap 1 and 3 corridors are the focus of this feasibility study report and link Cheltenham and Bristol with the Dorset coast, specifically Weymouth, Swanage and Bournemouth-Christchurch-Poole.

Aim

The aim of this feasibility study is to assess options for improving scheduled coach services in Strategic Gap corridors 1 and 3 and to determine if there would be sufficient passenger demand to sustain a new coach service route or routes.

Method

The Coach Strategy utilised data from National Highways' South West Regional Traffic Model to assess travel movements between key settlements, as a way of broadly gauging potential demand for coach travel. For the feasibility study, this has been supplemented with mobile phone data sourced from BT Active Intelligence Rail Portal via Network Rail. From this data source it has been possible to generate an estimate of passenger demand on different potential coach service routes.

Data has been sorted using Medium Super Output Area (MSOA) zoning. A series of road corridors have been identified between Cheltenham, Bristol and the Dorset coast. A western corridor would route via Frome, Yeovil and Dorchester; a central corridor via Chippenham, Westbury and Shaftesbury; and an eastern corridor via Swindon, Amesbury and Salisbury.

An optioneering exercise has been followed to explore potential types of services at both a conceptual level as well as estimating journey times based on a series of theoretical stopping patterns on each corridor route (with different terminating points along the Dorset coast).

The optioneering exercise has highlighted the pros and cons of different types of services, including the opportunities of serving more poorly connected town/city suburbs and rural communities versus the need to providing a faster service with journey times closer to those achieved by car or by train.

For the purpose of estimating travel demand, a simple approach has been used to define routes, with a single stop in each main town and no consideration given to suburban or edge-of-town stops in larger towns, or stops in rural areas between towns.

At this stage, the estimated demand has not been segmented by passenger type or journey purpose, although it is appreciated this will be needed to help inform the type of service that could be provided i.e. hours of operation, locations served and fares.

Key Findings

The feasibility study has considered current levels of connectivity across the study area:

• the majority of the settlements along each corridor are already connected by bus services, however the number operating on an hourly frequency is less.

- To make a longer distance journey beyond the next town, a passenger is likely to need to change buses at least once or more likely twice. Similarly by rail, journeys from one end of the study area to the other, passengers would most likely need to travel via Bristol or Reading.
- Scheduled coach services currently running north-south are limited to a single service operated by National Express in each direction a day linking Cheltenham and Bournemouth via Swindon and Winchester. In contrast, there are a lot of coach services which cut across the study area, running east-west to/from London but few stop within the study area.

The A-road network running through the study area is of mixed quality, with key bottlenecks. Sections of some A-roads such as the A350 are difficult for larger vehicles to route along because they are narrow and have a series of tight bends. There are proposed infrastructure improvements for some sections of the corridors but these will not fully address existing constraints.

Some of the settlements are bypassed whereas others the main roads run through the centre of towns. This would pose a challenge in operating a fast and efficient inter-urban coach service, but it would be necessary for services to be accessible for passengers.

Large-scale residential developments are proposed at different points along the routes. These developments will generate additional trips in the future and will need public transport connections to avoid being too car orientated. This may present an opportunity to generate additional patronage on coach services in the future.

It is already feasible to travel by rail along some but not all sections of the corridor although more typically than not, people will need to change trains at least once, and the journey may take them via Reading, Basingstoke, Southampton or Bristol. Faster journey times are sometimes possible by trail even with changes between trains, however this will depend on trains running on time. Interchange times vary from around 15 to 25 minutes.

Importantly, coach is often cheaper than train and that will appeal to some parts of the community. Passengers need to book in advance to take full advantage of cheaper fares or discounted tickets.

Passenger demand has been estimated across all of the main corridor routes. It has been determined that there are very few regular trips which occur over long distances, with a large proportion of trips occurring between one town and the next, i.e. journeys which are already served by bus and train in many cases.

It is estimated that the eastern corridor linking Cheltenham, Cirencester, Swindon, Tidworth, Amesbury, Salisbury, and Bournemouth-Christchurch has the greatest level of cumulative travel demand compared with the other assessed corridors.

Consideration has been given to excluding trips both beginning and ending in Bournemouth-Christchurch-Poole as the objective of the coach is to facilitate inter-urban journeys and the conurbation is already well served by bus and train. For the Bristol-Bournemouth route, trips between Bristol and Bath have been excluded as the two urban areas are already well connected by public transport and these trips account for over half of the cumulative demand along the route.

Annual road-based travel demand along each assessed corridor (all routes terminating in Bournemouth-Christchurch-Poole)

All routes terminating in BCP	Annual Road-Based Demand
Western Corridor	2,280,137
Central Corridor	4,549,020
Eastern Corridor	5,426,073
Bristol-Bournemouth Corridor	2,179,591

The eastern corridor has been examined further to estimate the number of passengers who could be attracted to using a new coach service. Four mode share scenarios have been assessed, assuming a proportion of road-based demand would be attractive to using a coach. 5% mode share is considered very aspirational and would require more substantial investment in promotional activities and potentially incentives such as reduced fares to attract patronage. A mode share of 0.5%-2% thought to be more realistic.

Total estimated cumulative coach service demand per time period (both directions) along the Eastern Corridor in four mode share scenarios – 0.5%, 1%, 2% and 5% of Road Based Demand

	AM (3 hours)	PM (3 hours)	Off Peak (18 hours)	Full Day (24 hours)	Full Weekend (48 hours)
0.5%	15	16	41	72	150
1%	31	32	81	144	301
2%	61	65	162	289	602
5%	153	229	406	722	1,504

It is estimated that there may be sufficient demand to justify up to 1-2 services a day, however demand is likely to be spread throughout the day rather than concentrated within short periods of time, therefore this may not be sustainable for operators.

An assessment of boardings and alightings along the route indicates that a large proportion of journeys are not travelling more than one stop which are journeys likely to be catered for in many cases by existing bus services at a higher frequency than what could be achieved with a new coach service.

Seasonality is likely to play a major role in the type of service provided especially given the importance that the visitor economy plays across the study area and in particular on the Dorset coast and in Bournemouth-Christchurch-Poole during the summer months. There is potential therefore that a more regular service could be supported in the peak summer months to accommodate the higher levels of leisure travel including people making day trips and travelling on holiday.

The assessment approach has taken a cautious approach to estimating demand, assuming a share of existing road-based demand only rather than also assuming a shift from some existing rail trips, as well as assuming that the service would not be used for shorter distance trips by assuming a single stop in each main towns along each route, no stops within rural areas in between the main towns, as well as excluding shorter distance trips within the large Bournemouth-Christchurch-Poole conurbation.

Potential connectivity improvements

Consideration has been given to potential improvements which could be made to existing public transport services and routes across the study area to help improve connectivity.

Inter-urban buses:

- Enhance existing inter-urban bus services through increased service frequencies, enabling through ticketing and reducing interchange times by aligning timetables on key inter-urban bus routes, e.g. 51 Cheltenham-Cirencester-Swindon, X5 Swindon-Salisbury, X3 Salisbury-Bournemouth, and 93 Cirencester-Malmesbury, 99 Malmesbury-Chippenham and X34 Chippenham-Trowbridge-Frome
- Enhance the quality of the on-board journey experience
- Increase service frequencies potentially
- Assess the feasibility of enabling through ticketing in combination with rail services.

National Express coach 161:

• Enhance the only north-south scheduled coach service operating within the study area – the NX 161, including potentially altering its route via Amesbury and Salisbury instead of Winchester, and route via Poole and then Bournemouth before travelling onto and terminating in Southampton. There would also be opportunity to add a stop for the service in Cirencester

Berrys Superfast:

• Berrys operates a series of 'east-west' coach routes cutting across Strategic Gaps 1 and 3. There would be opportunity to enhance connectivity between these services and other north-south services where they intercept each other.

Other service gaps and corridor connectivity

• There are minor connectivity gaps across the study area. Localised enhancements to public transport services could improve connectivity along sections of each assessed corridor including between Shaftesbury and Blandford Forum.

Interchange hubs:

• Enhance interchange facilities at key locations, including Swindon, Salisbury, Trowbridge, Westbury, Warminster, Dorchester and Blandford Forum which would act as key interchange points..

Table of Contents

1.	Introduction	9
2.	Geographical Context	13
3.	Cost of travel	28
4.	Future developments and transport schemes	31
5.	Scheduled Coach Service Case Studies	41
6.	Coach Service Key Requirements	57
7.	Coach Service Route Optioneering	60
8.	Travel Demand Assessment	74
9.	Conclusion and Next Steps	87
Appe	endix A – Public Transport Service Availability and Journey	
Time	S	90
Appe	endix B - Total Annual Road-Based Demand by Corridor	97
Appe	endix C – Eastern Corridor Time Period Demand (Weekday AM	
peak	(3 hours))	101
Appe	endix D - Eastern Corridor Time Period Demand (Weekday PM	
peak	(3 hours))	103
Appe	endix E - Eastern Corridor Time Period Demand (Weekday Off	405
peak	(18 hours))	105
Appe	endix F – Eastern Corridor Time Period Demand (Full Weekday).	107
Appe	endix G - Eastern Corridor Time Period Demand (Weekend - 2	400
days)	109
Appe	endix H - Boardings and Alightings by Stop – Full Weekday	
(⊏as		

Figures

Figure 1 – Broad definition of Strategic Gaps 1, 2 and 3	10
Figure 2 – Strategic Gaps 1 and 3 road network schematic	13
Figure 3 – Map of key transport stops/interchanges in Cheltenham	14
Figure 4 – Western Corridor (Red)	15
Figure 5 – Central Corridor (Purple)	17
Figure 6 – Eastern Corridor (Yellow)	19
Figure 7 – Dorset coast towns	20
Figure 8 – Rail versus Road travel time comparison from Cheltenham Town Centre	25
Figure 9 - Rail versus Road travel time comparison from Bournemouth Town Centre	26
Figure 10 - Rail versus Road travel time comparison from Bristol City Centre	26
Figure 11 – The Steadings Masterplan (west of Cirencester)	32
Figure 12 – North East Blandford consultation map	35
Figure 13 – Locations of key developments	36
Figure 14 – Go-op Railway's Planned Swindon to Weston-super-Mare rail route	39
Figure 15 – Aerial photo of the upgraded Salisbury Coach Park	40
Figure 16 - Drop off locations for Centaur commuter coach services	42
Figure 17 - Pick up locations for Centaur commuter coach services	43

Figure 18 - Oxford Tube service iterations Figure 19 – Image of the competing MK1 Stagecoach and X1 Arriva services Figure 20 – Visitor attraction information on Berrys Coaches website Figure 21 – Information on coach stops and accessibility provided by Berrys Coaches Figure 22 – Example of a double decker bus used for the X3 route Figure 23 – Pantograph charger and example of Enviro 400 EV bus used on the route Figure 24 – Interior of the upper deck on Transdev's Witchway bus Figure 25 – Example of a purpose-built Volvo EvoSeti bus used on the Purbeck Breezer	44 45 48 49 50 51 51
Figure 26 – 702 route from Reading to London via Windsor	. 02 53
Figure 27 – Extract of the TrawsCymru regional bus network	. 54
Figure 28 – Example single decker bus used on TrawsCymru network	. 55
Figure 29 - Concept 1 - Express service concept with limited stops	. 60
Figure 28 - Concept 2 – Express/Semi-Fast service with more frequent stops in larger settlements and limited stops in between	. 61
Figure 29 - Concept 3 – Express/Semi-Fast mixed service with more frequent stops in several larger settlements and potential limited detour route variations Figure 30 - Concept 4 – Modified long distance coach service route and stopping pattern Figure 31 – Summary of the north-south corridors within Strategic Gaps 1 and 3 Figure 32 – Accessibility to an edge-of-town stop to the west of Warminster Figure 33 - Accessibility to an edge-of-town stop to the south of Warminster Figure 34 - Accessibility to Warminster Town Centre Figure 35 - Methodological steps followed to estimate coach passenger demand Figure 36 - Main stopping locations split up by corridor used for travel demand assessmer	62 63 66 72 72 73 73 74
Figure 37 – Map showing the MSOAs required for assessment with surrounding MSOAs r used in study area Figure 38 - Map showing the MSOAs required for assessment with surrounding MSOAs n used in study area, and assessed coach service routes	. 75 10t . 76 0t . 77

Tables

Table 1 – Key features of coach services	. 56
Table 2 - Key Requirements for a new coach service	. 58
Table 3 - Summary of pros and cons for each coach service concept	. 64
Table 4 - Western Corridor Coach Journey Time Estimates	. 67
Table 5 - Central Corridor Coach Journey Time Estimates	. 68
Table 6 - Eastern Corridor Coach Journey Time Estimates	. 69
Table 7 – Bristol and Bristol Airport to Dorset Coast Coach Journey Time Estimates	. 70
Table 8 – Total Annual Road Based Demand Across Western Corridor	. 78
Table 9 - Total Annual Road Based Demand Across Central Corridor	. 78
Table 10 – Total Annual Road Based Demand Across Eastern Corridor	. 79
Table 11 - Total Annual Road Based Demand Across Bristol-Bournemouth Corridor	. 79
Table 12 – Summary of Annual Road Based Demand by Time Period – Eastern Corridor	
excluding Bournemouth-Christchurch-Poole internal trips	. 80
Table 13 – Total Estimated Coach Demand per Time Period (both directions) along the Eastern Corridor in four mode share scenarios – 0.5%, 1%, 2% and 5% of Road Based	
Demand	. 81
Table 14 - Total travel demand and proportion of of demand occuring within the summer	
months to Weymouth, Swanage and Bournemouth	. 82

1. Introduction

Western Gateway Sub National Transport Body Coach Strategy

- 1.1 The Western Gateway Sub-National Transport Body (STB) published its Coach Strategy in August 2023¹. The overarching purpose of the strategy is to capture the current state of play for the different types of coach services that are operating across the STB region² and to identify future priorities for improving coach services.
- 1.2 The process of developing the Coach Strategy involved gathering data on the Western Gateway STB region's coach sector including scheduled coach service timetables, the locations of stops/interchanges, service fares and the operators who are based and/or operating services in the region including both scheduled services and for tours and private hire. The strategy also used data from National Highways' South West Regional Traffic Model to assess travel movements between key settlements across the region, as a way of gauging potential demand for coach travel.
- 1.3 Knowledge of the coach sector is constrained by a lack of consistent and detailed data so the development of the Coach Strategy sought to compile new datasets or make effective use of existing datasets to help develop a clearer picture of coaches currently serving the STB region.
- 1.4 The UK coach sector has been lacking attention at a national level and a clear vision and forward strategy for improvement, particularly when compared to other forms of public transport. In contrast, the bus sector has received increased attention in recent years through the publication of the previous government's National Bus Strategy published in March 2021 (albeit this does cover some issues which relate to coach services) and initiatives including capping single bus fares to £3 (as of 1st January 2025).
- 1.5 Organisations including the Confederation for Passenger Transport (CPT-UK) are aiming 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. The Coach Strategy has drawn from evidence and documents produced by the CPT-UK including its own Coach Strategy, 'Backing Britain's Coaches'³ which was published in 2021.
- 1.6 The Western Gateway STB Coach Strategy sets out the following five objectives:
 - 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.
 - 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.

¹ https://westerngatewaystb.org.uk/

² The Western Gateway STB region includes Gloucestershire, the West of England Combined Authority, Wiltshire, Dorset and Bournemouth, Poole and Christchurch authority areas, and incorporates major settlements including Cheltenham, Gloucester, Bristol, Bath and Salisbury.

³ https://www.cpt-uk.org

- 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 decisionmaking and action across the region to support the long-term resilience and vitality of the region's coach sector.
- 1.7 The strategy identified three strategic gaps or corridors where there could be opportunities to enhance scheduled coach services to provide better public transport connectivity between the region's larger settlements and through rural communities. This was based on data gathered on trip patterns and where in particular there are fewer or no direct rail services connecting places within the region.
- 1.8 The three strategic gaps as defined in the Coach Strategy are (in no order of priority):
 - Strategic Gap 1 South Coast to Central Route: An indicative corridor linking Bournemouth, Poole, Christchurch, Blandford Forum, Shaftesbury, Warminster, Frome, Bath and Bristol (approximately 68 miles in length)
 - Strategic Gap 2 Gloucestershire to Bristol Airport Link: An indicative corridor linking Cheltenham, Gloucester, Stroud, Wotton under Edge, Thornbury, Bristol and Bristol Airport (approximately 50 miles in length)
 - Strategic Gap 3 Gloucestershire to South Coast Route: An indicative corridor linking Cheltenham, Cirencester, Tetbury, Malmesbury, Chippenham, Melksham, Trowbridge and towards Bournemouth, Poole, Christchurch, with potential also to consider a branch towards Swanage and Weymouth (approximately 95 miles in length)
- 1.9 The exact definition of the corridors and the settlements that could be served by new or improved coach services would be explored further through feasibility studies. The corridors are shown indicatively in the figure below.



Figure 1 – Broad definition of Strategic Gaps 1, 2 and 3

Source: using base mapping supplied by © OpenStreetMap (and) contributors, CC-BY-SA

- 1.10 Each corridor needs further assessment to confirm the potential demand for new scheduled coach services, and to define the characteristics of services, including routeing and stopping pattern, frequency, specification of vehicle and target customer market(s) which will be influenced by the locations served.
- 1.11 To reflect the wider UK scheduled coach market, a new coach service on any of the three identified corridors is unlikely to be publicly subsidised and ultimately therefore it will be for private coach operators to determine if a new service would be commercially viable to operate.
- 1.12 Following publication of the Western Gateway STB Coach Strategy, it has been the intention of the STB to develop feasibility studies for each of the strategic gap corridors which will set out the evidence and establish a case for whether new coach services could be viable. These studies could then be presented to the local transport authorities and prospective operators through the newly formed Western Gateway STB Coach Forum.
- 1.13 Whilst services would most likely operate on a commercial basis, some public capital investment may be required for supporting infrastructure such as new or improved coach stops/interchanges, improved access to stops such as pedestrian crossings and footways, or in the marketing of new services.
- 1.14 This report covers Strategic Gaps 1 and 3 which share some sections of route between settlements, in particular across Wiltshire and towards the Dorset Coast. For the purpose of this report, the two strategic gaps have been merged to be considered as one.
- 1.15 Strategic Gap 2 is covered in a separate feasibility study report.

Phase 3 scope and outline methodology

- 1.16 The core activities undertaken as part of this feasibility study are briefly summarised below and discussed in more detail in later chapters of this report.
 - i) Investigation of existing bus, coach, demand responsive transit and train service links within the corridor, and how this might influence the routeing and stops of a new scheduled coach service (see **Chapter 2** of this report).
 - Exploration of the core market(s) (groups of passengers defined by journey purpose/type of destination) that a new scheduled coach service route could target and therefore the types of destinations it could serve (also covered in Chapter 2 of this report).
 - iii) Research of case study scheduled coach services, the type of service they provide including the places served, vehicles used, service frequencies, stopping patterns and fares. Reference is also made to recent new bus services offering a more comfortable on-board experience more like that offered by a coach (see Chapter 3 of this report).
 - iv) Consideration of the level of fare that could be charged on a new coach service by presenting a comparison against existing long distance coach service fares and rail service fares (see **Chapter 4** of this report).
 - v) Consideration of planned major developments which could generate new demand and could be served by coach, as well as planned transport infrastructure improvements (see **Chapter 5** of this report).
 - vi) Development of a set of coach service key requirements (see **Chapter 6** of this report).

- vii) Consideration of coach service routeing and stopping patterns in two main steps: firstly to reflect on the case study coach service routes to define a set of broad service stopping and routeing concepts; and secondly to assess stopping pattern configurations and compare estimated journey times to help identify the more optimal route from a journey time perspective (see **Chapter 7** of this report).
- viii) Estimation of potential coach service passenger demand utilising mobile phone data sourced from BT via Network Rail, and assessing a range of corridor routes and stopping patterns drawing from the options considered in Chapter 7 (see **Chapter 8** of this report).

2. Geographical Context

2.1 Figure 2 below is a schematic showing the key settlements across the study area. Three broad corridors have been identified, and these are distinguished based on the roads that connect key settlements.



Figure 2 – Strategic Gaps 1 and 3 road network schematic

- 2.2 Strategic Gaps 1 and 3 cover the following local authority areas:
 - Wiltshire
 - Dorset
 - Somerset (including former Mendip and South Somerset district areas)
 - Bournemouth, Christchurch and Poole
 - Swindon

Within the West of England Combined Authority Area:

- City of Bristol
- Bath and North East Somerset
- South Gloucestershire

Within the Gloucestershire County Council area:

- Cheltenham
- Cotswold
- 2.3 The remainder of this chapter describes the key settlements and main transport connections. The study area is broken into small sections, starting with the northern-most section between Cheltenham and Cirencester, then describing three broad corridors running parallel north-to-south across parts of Bristol, Bath, Somerset and Wiltshire, and then finally describing the potential end point(s) of the corridors along the Dorset coast Weymouth, Swanage, Poole, Bournemouth and Christchurch.

Northern End: Cheltenham and Cirencester

- 2.4 At the northern end of the corridor the key settlements that could be served by a new coach service are Cheltenham and Cirencester. All three corridors start at Cheltenham and run through Cirencester before separating.
- 2.5 Cheltenham is a historic spa town which is located on the western edge of the Cotswolds and has a population of just over 120,000⁴. Cheltenham has grown into an important local and regional hub for retail, key services and leisure, and is a popular visitor destination being famous for hosting the Cheltenham Festival, one of the most prestigious events in the horse racing calendar. It is also home to the British Government Communications Headquarters (GCHQ), a major employer located on the western side of the town. The main commercial areas of the town are located on the northern side, generally clustered around the A4019 linking to the M5.
- 2.6 Montpellier is an attractive shopping district in Cheltenham, located to the south of the town centre and known for its boutiques, gardens, cafes and bars, and it also contains the University of Gloucestershire's Park Campus.
- 2.7 Cheltenham Spa railway station is located to the southwest of the town centre, with good rail connections to London, Birmingham and Bristol, but around a half an hour walk from the town centre. In contrast, Cheltenham's Royal Wells Coach Station is within a 5-minute walk of most of the town centre.



Figure 3 – Map of key transport stops/interchanges in Cheltenham

⁴ All population estimates presented in this report have been sourced from https://citypopulation.de/en/uk/southwestengland

- 2.8 There is a separate bus/coach interchange at Arle Court which is on the outer edges of Cheltenham towards Gloucester, sitting just east of the M5 / A40 junction. As well as containing a Park and Ride, Arle Court serves coach services heading to London, the North and the Southwest, as well as some local bus services.
- 2.9 Cirencester lies approximately 13 miles south of Cheltenham with the A417 connecting the two towns.
- 2.10 Cirencester is a market town and civil parish in the Cotswold District of Gloucestershire, with a population of around 18,000. Cirencester is the eighth largest settlement in Gloucestershire and the largest town within the Cotswolds. The nearest train station is Kemble.



Western Corridor: Tetbury to Dorchester

Figure 4 – Western Corridor (Red)

2.11 Approximately 10 miles southwest of Cirencester is the small town of Tetbury which has a population of nearly 6,500. The towns are connected via the A433 which runs through the middle of Tetbury. The town lies between Cirencester and Bath. As with Cirencester, the nearest railway station is at Kemble.

- 2.12 Approximately 20 miles to the south of Tetbury is Bath. These two settlements are connected via the A433 and A46 with the latter crossing over the M4 at Junction 18 Tormarton Interchange which is approximately half way between them.
- 2.13 Bath has a population of around 94,000 and is located in the valley of the River Avon. The city became a UNESCO World Heritage Site in 1987 and was later added to the transnational World Heritage Site known as the "Great Spa Towns of Europe" in 2021. Bath is also the largest city and settlement in the ceremonial county of Somerset (Bath now sits within Bath and North East Somerset authority area, which is part of the West of England Combined Authority). Bath Spa is the only station in the city with links to both London and Bristol.
- 2.14 Bristol is located approximately 11 miles to the west of from Bath. The City of Bristol unitary authority begins just south of the University of the West of England (UWE) Frenchay Campus and continues to the southern-most suburbs of Whitchurch and Hartcliffe. It is bounded by the River Avon in the south-east as it flows from Bath to Bristol and then into the River Severn.
- 2.15 The Bristol city area is the 11th most populous area in the UK, with a population of just under 500,000 (excluding the northern fringe area and suburbs to the east including Kingswood). This makes it the most populous area in the south west of England. The City of Bristol region has a major railway station at Bristol Temple Meads, which is just to the south east of the city centre and provides services to the rest of the south west as well as London, Wales, Manchester and Birmingham.
- 2.16 Bristol Airport, which lies to the south of the city, handles around 9 million passengers per year, making it the 8th busiest airport in the UK, serving predominantly short-haul, low-cost airlines such as easyJet and Ryanair. The airport is not served directly by rail services, with the nearest station as the crow-flies being Nailsea and Backwell approximately 3 miles away. The coach is served by a range of local and inter-urban bus services including the A1 Airport Flyer service connecting to Bristol and the A4 Air Decker service to Bath. The airport is served by several coach services with links towards Somerset and Devon to the south, Wales to the west and Birmingham to the north.
- 2.17 Around 11 miles to the south of Bath and 19 miles southeast from Bristol, lies Frome which is within the Somerset unitary area and has a population of just under 24,000. Frome is connected to Bath via the A36 and A361. Frome railway station is served by GWR services to the rest of the south west as well as London.
- 2.18 Moving southwest along the A359 near the crossroads of the A359 and A371 is the small town of Castle Cary which is also within the Somerset unitary authority area. The town has a population of around 3,500. The town's railway station is located to the north of the town, and despite it being in a largely rural area it offers direct rail services to London, Exeter and Weymouth. This is also the principal station serving the Glastonbury Festival, which is held in nearby Pilton.
- 2.19 Heading south along the A359 is Yeovil which is approximately 23 miles from Castle Cary and lies close to the Dorset border. Yeovil has a population of just over 50,000. The town centre is located on the southern side of the town, and three main industrial areas are located on the southwestern, eastern and western sides of the town. Ninesprings Country Park is in the south-east near Penn Hill, linked by a cycle way along the route of the old railway to Riverside Walk, Wyndham Hill and Summerhouse Hill, forming the 40-hectare (99-acre) Yeovil Country Park. Yeovil Pen Mill station is located to the south east of the town, with Yeovil Junction just outside the village of Stoford (around 2 miles south of the town centre).
- 2.20 Heading south along the A37 is the town of Dorchester which is around 18 miles from Yeovil. Dorchester is the county town of Dorset and has a population of just over 21,000 which includes Poundbury, an experimental urban extension led by the Duchy

of Cornwall. The A35 and A37 surround the town. The town has two railway stations: Dorchester West lies on the Wessex Line and is operated by GWR, while Dorchester South is operated by South Western Railway and is on the South West Main Line. The two lines join together to the south of the town.



Central Corridor: Kemble to Blandford Forum

Figure 5 – Central Corridor (Purple)

- 2.21 4 miles southwest of Cirencester along the A429 is the village of Kemble which lies close to the south of the River Thames. It has a population of nearly 1,000. Notably, the village has a railway station which acts as the main public transport hub for nearby Cirencester, with direct rail services to London Paddington, Swindon and Cheltenham.
- 2.22 Malmesbury lies in north Wiltshire in the west of the Cotswolds area and 7 miles from Kemble with a population of just over 7,000. The town's largest employer is Dyson and also houses the Dyson Institute of Engineering and Technology. The nearest railway stations are Kemble and Chippenham.
- 2.23 Further south along the A429 and via the M4 Junction 17 Stanton St Quintin interchange is the town of Chippenham in Wiltshire. It has a population of approximately around 36,000. The River Avon runs through the town. Chippenham railway station offers direct services to London Paddington, Bristol and Weston-super-Mare.

- 2.24 Approximately 4 miles south west of Chippenham is the historic market town of Corsham which has a population of around 11,000. It lies on the A4 linking Chippenham to Bath.
- 2.25 Heading 6 miles south from Chippenham along the A350 is Melksham which has a population of just over 18,000. Melksham railway station lies on the outskirts of the town connecting it with such places as Swindon, Westbury and Cheltenham using the Wessex Main Line. Once again the River Avon flows through the town with the A350 cutting through the west of the town connecting the M4 with Poole. There is also a large industrial area in the south of Melksham in the Bowerhill area.
- 2.26 Approximately 6 miles east of Melksham is the market town of Devizes which lies off the main A350 corridor. The town has a population of just under 19,500.
- 2.27 Trowbridge is located 5 miles southwest of Melksham. It is the county town of Wiltshire and sits close to the border with Somerset. It has a population of slightly under 45,000. The town's main industrial areas are located on the northern and southern sides of the town.
- 2.28 The A361 runs through the town, connecting it to Swindon to the north-east and Barnstaple to the south-west, while the north–south A350 to Poole passes close to the town. Trowbridge railway station, which is located adjacent to the town centre, lies on the Wessex Main Line connecting north to Melksham as well as to Cardiff, Bristol and Weymouth.
- 2.29 Westbury is a market town in west Wiltshire. The town lies close to the northwestern edge of Salisbury Plain, about 4 miles south of Trowbridge and a similar distance north of Warminster. The population of the town is just over 16,000. The A350, which connects the M4 motorway with the south coast, passes through the middle of the town.
- 2.30 The urban area has expanded to include the village of Westbury Leigh and the hamlets of Chalford and Frogmore. West Wiltshire Trading Estate lies just north of the town close to the railway station where trains operate to various places including Yeovil, London Paddington and Portsmouth.
- 2.31 Four miles south along the A350 is Warminster which is a historic market town in south-west Wiltshire, on the western edge of Salisbury Plain and with a population of around 18,000. The town is at the junction of two primary routes, the A36 and A350, which both now bypass the town. Warminster railway station, similarly to Westbury, is on the Wessex Main Line.
- 2.32 Shaftesbury is an historic town in Dorset near the border of Wiltshire, 14 miles south of Warminster on the A350. Both the A30 and A350 run through Shaftesbury. It has a population of just over 9,100 and is well known for Gold Hill, a the steep cobbled street. The closest railway station is Gillingham 4 miles northwest of the town. There are local bus services connecting the town to surrounding settlements.
- 2.33 Further south along the A350 is the Dorset market town Blanford Forum which is approximately 10 miles south of Shaftesbury and lies on the River Stour. The town has a population of approximately 11,800. It lies on the junction of the A350 and A354 but is skirted by an eastern bypass. As with Shaftesbury, Blandford Forum is not on the rail network. Local buses from Blanford Forum run to locations including Poole, Bournemouth and Salisbury.



Eastern Corridor: Swindon to Bournemouth Airport

Figure 6 – Eastern Corridor (Yellow)

- 2.34 Lying 13 miles southeast of Cirencester via the A419 is the large town of Swindon which has a population of approximately 233,000. Swindon lies just north of the M4 corridor with the A419 running to the east of the town. Swindon is accessed by two junctions on the M4 (east and west of the town). The town's railway station is a key hub on the Great Western Main Line connecting to Bristol, Cardiff and London Paddington, as well as the Golden Valley line connecting to Cheltenham and Gloucester.
- 2.35 Heading south from Swindon along the A346 lies the small market town of Marlborough with a population of slightly over 8,800. Marlborough lies on the Old Bath Road (A4), intersecting with the A346 which connects north to Swindon and south towards Tidworth via Burbage. The town lies on the River Kennet. Marlborough is not on the rail network, with reliance for public transport placed upon local bus connections to nearby towns. The long-distance National Trail, the Wessex Ridgeway, runs from Marlborough to Lyme Regis in Dorset.
- 2.36 Heading 12 miles south on the A346 and then A338 is Tidworth which is a small garrison town in south-east Wiltshire lying on both sides of the A338 with a population of around 10,700. Originally two settlements called North Tidworth and South Tidworth, the modern town is dominated by Tidworth Camp, a large British Army site. The nearest railway station is Andover which offers direct services to London Waterloo.

- 2.37 Amesbury is located 7 miles southwest of Tidworth and sits on the A303 running between Somerset and Hampshire, approximately 2 miles west of the A338. Stonehenge, a UNESCO world Heritage Site, is located around 3 miles west of Amesbury via the A303. The town has a population of around 12,700, with an additional 11,000 living in nearby Durrington and Bulford Camp. The nearest railway station located at Grateley on the London to Salisbury line.
- 2.38 Seven miles south of Amesbury via the A345 is Salisbury which is a cathedral city with a population of nearly 48,000. Salisbury is also linked directly with Tidworth via the A338. The city sits at the intersection of the A343, A345, A354 and A360, with the A36 forming a partial bypass of the city centre. The town's railway station is an interchange between the West of England Main Line and the Wessex Main Line.
- 2.39 Heading south along the A338 about 15 miles from Salisbury is the town of Ringwood, Hampshire, with a population of nearly 12,800. Ringwood sits outside of the Western Gateway STB area in the neighbouring Transport for South East STB region.
- 2.40 This is where the A338 meets the A31 which connects to Southampton to the east, and runs across the north of the Bournemouth-Poole-Christchurch conurbation towards Dorchester.
- 2.41 6 miles south of Ringwood is Bournemouth Airport. Airlines including easyJet, Jet2, Ryanair and TUI operate from this airport to destinations across Europe. The annual passenger numbers from 2023 were 950,000. The airport is poorly served by public transport with a single bus route connecting to Bournemouth town centre, and is not on the national rail network.

Southern end – Dorset Coast: Weymouth, Swanage, Poole, Bournemouth and Christchurch



Figure 7 – Dorset coast towns

- 2.42 Weymouth is a seaside town in the county of Dorset. Situated on a sheltered bay at the mouth of the River Wey, 7 miles south of the county town of Dorchester, Weymouth has a population of approximately 55,000. The A354 connects Weymouth to Dorchester and the A35 where onward road connectivity is provided towards Bridport and Exeter in the west, Yeovil and Blandford Forum to the north and Poole and Bournemouth to the east.
- 2.43 Weymouth railway station is the terminus of the route from London Waterloo and the route from Westbury, Gloucester and Bristol. Weymouth is connected to towns along the Jurassic Coast by the X53 bus.
- 2.44 Weymouth is an important coastal resort and attracts people for day trips and holiday all year round and especially during the summer months. People will also use Weymouth as a base for exploring the wider coastal area.

- 2.45 Moving eastwards along the coast, Swanage is a smaller coastal town with a population of slightly over 9,000. It is at the eastern end of the Isle of Purbeck and one of its two towns, approximately 6 miles south of Poole and 25 miles east of Dorchester. Swanage has a restored heritage steam railway which operates for most of the year and is connected to the main line at Wareham. The physical connection between the Swanage Railway and the main line has been restored but is currently used only during the summer months. The main A-road feeding into Swanage is the A351 from Wareham and via Corfe Castle.
- 2.46 Swanage is also a resort town attracting people for day trips and holidays and is located close to coastal landmarks such as Durdle Door and Lulworth Cove.
- 2.47 Heading along the coast and around its natural harbour is the town of Poole. The town has a population of approximately 141,000. Poole is a tourist resort whilst also having a large harbour with ferry services operating to Cherbourg in France and seasonal services to St Malo in France and Guernsey and Jersey. The main road links into Poole are the A35 and A350.
- 2.48 There are four railway stations in the Poole area which from west to east are Hamworthy, Poole, Parkstone and Branksome (also serving the Bournemouth area). These stations offer direct services to Weymouth and London Waterloo.
- 2.49 Poole forms part of a larger conurbation with Bournemouth which has a population of around 196,500. Bournemouth is a major urban centre hosting shops, key services, a university and hospital, as well as being a prominent holiday resort which attracts people all year round but in particular during the summer months.
- 2.50 The A35 runs through Poole connecting into the A338 which is the main arterial road cutting across to the north of Bournemouth town centre.
- 2.51 CrossCountry services run from Bournemouth station to Manchester Piccadilly with Pokesdown, a separate station, on the London Waterloo to Weymouth Line. Bournemouth has a population of nearly 200,000. The A338 runs through the town and runs north of Christchurch.
- 2.52 Christchurch is the smallest of the three towns which form the Bournemouth-Poole-Christchurch conurbation, and has a population of just under 50,000. It adjoins Bournemouth to the west, with the New Forest to the east. As with Poole and Bournemouth, it is situated on the London Waterloo to Weymouth rail route. The A35 links Christchurch to Bournemouth.

Visitor economy

- 2.53 The study area includes attractive and popular destinations for leisure and tourism. The visitor economy is strategically important to the study area and wider region.
- 2.54 According to The Economic Impact of Dorset's Visitor Economy report⁵ published in 2022 (which includes the Bournemouth-Christchurch-Poole), the area welcomed nearly 24 million day and staying trips in 2022 with a total visitor related spend of £1.6m and total estimated numbers related to the visitor economy being 33,780 which represents 9% of all employment. Bournemouth and West Dorset are identified as the most visited locations.
- 2.55 Wiltshire's visitor economy is reported to be worth in excess of £1.5 billion, attracting 19.6 million visitors per annum and supporting 28,000 jobs⁶.

⁵ https://www.visit-dorset.com/industry/research/destination-performance/

⁶ https://www.visitwiltshire.co.uk

- 2.56 The Cotswolds area, which extends out of the area of focus of this study, is estimated to have attracted over 5 million day visits in 2023, total visitor spend over £366m and supporting 6,480 jobs⁷.
- 2.57 It is important therefore in consideration of potential new coach service routes, that services could play an important role in connecting to key tourism destinations and resorts, and therefore making an important contribution to the local economy.

Road connectivity

- 2.58 Strategic Gaps 1 and 3 comprises three main parallel corridors running north to south and formed of A-road linking the towns and cities in the study area.
- 2.59 In some areas throughout the corridors, the quality of the road network is inconsistent and in parts somewhat disjointed, with inter-urban roads bypassing some towns (e.g. the A350 around Chippenham, Melksham, Warminster and Blandford Forum) but routeing through others (e.g. the A350 route Westbury, Shaftesbury) leading to longer journeys.
- 2.60 There are no motorways running along the length of the corridor, with only the M4 cutting across east to west approximately half way down the corridor.
- 2.61 For long distance trips running the full length of the corridor, online journey planning tools recommend drivers use sections of the road network outside of the study area, most notably the A34 linking the M4 past Newbury and Winchester to Southampton, and the M27 and A31 connecting Southampton and Bournemouth.

Rail connectivity

- 2.62 Appendix A provides an overview of transport connections between the key settlements described earlier. Travelling substantial distances north-south within Strategic Gaps 1 and 3 is likely to require at least one interchange between public transport services or modes.
- 2.63 There are better rail connections in the western corridor south of the M4, through Wiltshire, Somerset and Dorset. There are, for example, direct trains running from Bristol and Bath to Weymouth via Yeovil and Dorchester, taking just under 2 and half hours.
- 2.64 There are fewer direct rail connections in the central corridor, with Cheltenham and Kemble directly linked and the north Wiltshire towns of Chippenham, Melksham, Trowbridge and Westbury located on the national rail network. Travelling further south requires at least one change of train.
- 2.65 The eastern corridor has limited direct rail service connections, with Cheltenham linked to Swindon, and Christchurch linked to Bournemouth on the same railway lines.
- 2.66 The majority of rail services within the corridor are operated by Great Western Railway (GWR) and South Western Railway (SWR). Cheltenham Spa sits on the western edge of the Transport for Wales (TfW) rail network.
- 2.67 Cheltenham Spa station is on the same rail corridor and is also served by direct GWR services towards London Paddington, as well as more CrossCountry (CCT) services including those running to Manchester and Aberdeen in the north and Plymouth in the south.

⁷ https://www.cotswolds.com/industry/about-us/data-strategy/economic-impact-studies/

- 2.68 The Golden Valley line, operated by GWR, connects Cheltenham, Gloucester, Kemble and Swindon via Stroud. The line diverges off the main Birmingham to Bristol route just north of Stonehouse.
- 2.69 The Heart of Wessex Line, operated by GWR, runs between Bristol and Weymouth and connects Bristol, Bath, Westbury, Frome, Castle Cary, Yeovil, Dorchester West and Weymouth.
- 2.70 The West of England Line cuts across the study area with stations the larger settlements of Salisbury and Yeovil as well as stations in smaller settlements including Gillingham and Tisbury which are located away from the main north-south corridors being assessed in this study.
- 2.71 The Great Western Main Line operates between Swindon, Chippenham, Bath and Bristol.
- 2.72 The Wessex Main Line links Salisbury, Warminster, Westbury, Trowbridge and Melksham, and connecting into the Great Western Main Line at two points, with one branch routeing via Melksham and connecting near Chippenham and another branch routeing via Bradford-on-Avon and connecting at Bath.
- 2.73 Weymouth, Dorchester South, Poole, Bournemouth and Christchurch lie on the South West Main Line which routes on towards Southampton, Winchester, Basingstoke and London.
- 2.74 Bristol Temple Meads is the largest station in the corridor with GWR and CCT services linking to London Paddington, Bath, Gloucester, Cheltenham, Cardiff, Plymouth, Weston-Super-Mare, Manchester and Scotland.
- 2.75 There are several key settlements within the study area which do not have a rail station, the largest being Cirencester (approximately 4 miles from Kemble station) but also including Corsham (approximately 4 miles from Chippenham station); Shaftesbury (approximately 4 miles from Gillingham station); Blandford Forum (approximately 12 miles from Poole station) and Swanage (approximately 9 miles from Wareham station⁸).

Coach connectivity

- 2.76 The choice of coach services running the length of Strategic Gaps 1 and 3 is extremely limited.
- 2.77 National Express operates the 160/161 route linking Birmingham and Bournemouth, with the 160 linking Oxford, Winchester, Southampton and then routeing into Bournemouth via Ringwood, and the 161 service linking Cheltenham, Swindon and then taking the same route via Winchester into Bournemouth.
- 2.78 The 161 runs only once a day, Monday-Sunday, departing Cheltenham at 18:35, calling at Swindon at 19:30 and then arriving in Bournemouth at 22:05 (3 hours and 30 minutes after departing), and in the opposite direction departing Bournemouth at 07:45, calling at Swindon at 10:35 and arriving in Cheltenham at 11:35 (3 hours and 50 minutes after departing). The sister 160 service runs only twice a day but in combination for people travelling the full length of the route between Birmingham and Bournemouth there are three services a day in each direction.

service.html#:~:text=The%20Swanage%20Railway%20has%20withdrawn,mainline%20connection%20at%20Worgret%20Junction.

⁸ A trial service linking Swanage on the heritage line directly with Wareham on the national rail network operated in 2017 and 2023, however plans to introduce a service on a permanent basis are not being progressed:

https://www.railadvent.co.uk/2024/03/swanage-railway-withdraws-plans-for-wareham-train-

- 2.79 There are many examples of coach services that cut across Strategic Gaps 1 and 3 on a broadly east-west orientation and therefore not facilitating the north-south journeys that are the focus for the study. These services include:
 - National Express 040 linking Bristol and London (it does not stop anywhere else within the study area);
 - National Express 401 service which once a day starts in Trowbridge then calls at Melksham, Devizes, Wroughton and then Swindon and then onto the Heathrow and London;
 - National Express 403 linking Bath and London via Corsham and Chippenham;
 - National Express 444 linking Gloucester and London via Cheltenham (Arle Court, Royal Wells bus station and Charlton Kings);
 - National Express 507/509 linking south Wales and London which route along the M4 and do not stop in the study area at all;
 - National Express services running between London and the Dorset coast serving Bournemouth, Poole and Weymouth; and
 - Berrys Coaches' Superfast services linking London and towns in Somerset and Wiltshire including Yeovil, Frome, Warminster and Amesbury.
- 2.80 More details on some of these services are provided in Chapter 5 case studies.

Inter-urban bus connectivity

- 2.81 An extensive network of local bus services operates across the study area. The majority of these services will cover local networks gravitating towards larger settlements. There are however several examples of longer distance inter-urban buses, including the following:
 - Stagecoach 51 linking Cheltenham, Cirencester and Swindon (approximately 28 miles), operates on an hourly frequency and takes 1 hour and 47 minutes between both ends of the route;
 - Salisbury Reds X5 linking Swindon and Salisbury (approximately 35 miles), operates on an hour and half frequency and takes around 2 hours between both ends of the route;
 - More X3 linking Salisbury and Bournemouth (approximately 25 miles), operates on a half hourly frequency and takes around 1 hour and 15 minutes between both ends of the route; and
 - Salisbury Reds 2/X2 linking Salisbury and Devizes (approximately 23 miles), operates approximately every hour (although the frequencies vary more in the afternoon) and takes around 1 hour and 10 minutes between both ends of the route.
- 2.82 More details on some of these services are provided in Chapter 5 case studies.
- 2.83 It is possible to travel the full length of the corridor on just three bus services, with Swindon and Salisbury being the main interchange points. For a southbound journey, Stagecoach 51 services from Cheltenham arrive in Swindon generally on the hour.
- 2.84 The Salisbury Reds X5 departs Swindon at a variety of times during the day, some at 40 or 50 minutes past the hour and some 10 or 20 minutes past the hour. Therefore, southbound passengers wanting to make a change from the 51 to the X5 could have up to a 50-minute wait time in Swindon.
- 2.85 The southbound X5 arrives in Salisbury at a variety of times. For onward connections onto the X3 towards Bournemouth, there is a reduced wait time as the X3 service

operates more frequently so the most that a passenger might have to wait is around 25 minutes.

- 2.86 Several gaps have been identified in the inter-urban bus network which are more notable given there are no rail or coach connections either.
- 2.87 There are no direct connections between Blandford Forum, Shaftesbury and Warminster along the A350, a distance of around 25 miles.
- 2.88 Buses connect Cirencester to Tetbury however there are no onward bus services connecting Tetbury towards Yate, Chipping Sodbury and Bath.

Travel Times

- 2.89 Figure 8 to Figure 10 show the comparison between estimated travel times by car within 60 minutes (shown in red) versus by public transport (in most cases rail) within 90 minutes (shown in green).
- 2.90 These figures highlight is that it is feasible to travel much further and more places in less time by car than by public transport. In the context of Strategic Gaps 1 and 3, these figures provide a strong indication that travelling by public transport can take a lot longer than equivalent journeys made by car.



Figure 8 – Rail versus Road travel time comparison from Cheltenham Town Centre



Figure 9 - Rail versus Road travel time comparison from Bournemouth Town Centre



Figure 10 - Rail versus Road travel time comparison from Bristol City Centre

2.91 Appendix A describes the availability of public transport services between key settlements across the study corridor.

Summary

- 2.92 The quality of the inter-urban road network appears to have influenced the provision of bus and coach services, with only one coach service a day linking Cheltenham and Bournemouth via Swindon which skirts out of the corridor to route via Southampton.
- 2.93 A number of inter-urban bus services operate in the study area, in some cases over quite notable distances. In combination, a series of bus routes provide longer distance connectivity across much of the study area but are unlikely to be attractive to people making long distance trips because at passengers would need to travel on at least three separate services.
- 2.94 There is also notably poor rail connectivity end-to-end along the corridor, although much like the road network there are some good connections along parts of the corridor and faster routes cutting across the study serving broad east-west movements.
- 2.95 Several movement corridors have been identified based on the pattern of settlements and the road network which are explored further in relation to developing options for potential new coach service routes (Chapter 7) and assessing passenger demand (Chapter 8).

3. Cost of travel

- 3.1 A comprehensive assessment of journey fares between different origins and destinations across the STB area is provided in the Coach Strategy, although fares are likely to have changed since the data was compiled in 2022.
- 3.2 This chapter includes a comparison of fares by different modes between key origins and destinations within the study corridor.

Travelling by Public Transport

- 3.3 A comparison has been made of fares offered on the various public transport modes within the corridors for a selection of key journeys.
- 3.4 It should be noted that at the time of writing, many local bus service fares are capped at £3 for a single journey (as of 1st January 2025)⁹
- 3.5 Whilst not all bus companies and routes are included, a comprehensive number of local bus services are covered in the scheme within the corridor.
- 3.6 It is possible therefore that passengers could transfer between connecting bus services, therefore making longer journeys across the corridor, at a fairly low cost.
- 3.7 As noted earlier in the report, there are no bus services which extend the full length of Strategic Gap corridors 1 and 3 and given the distances between many of the settlements within the study area, it is likely that at least three bus services would be needed to make a journey from the northern end of the corridor to the southern end, and this would take a considerable amount of time.
- 3.8 Fares for the National Express 161 service are summarised as follows:
 - Cheltenham-Bournemouth Coach Station (National Express 161): £16.10-£20.00 for a single ticket; £28.80 for a standard (non-refundable) return ticket; or £34.00 Fully Flexible return ticket.
- 3.9 This highlights that very cheap fares are offered for a single journey which might be relevant to less frequent travellers using coaches such as students and people travelling on holiday, who are less likely to be making a return journey within the same day.
- 3.10 Planning a journey and booking a ticket in advance is advised, and often means that cheaper tickets can be obtained. The 161 only operates once a day (the 160 service Oxford operates more regularly).
- 3.11 As a comparison to the National Express 161 service, the typical fares offered for a journey by train journey between Cheltenham and Bournemouth are shown below:
 - Cheltenham Spa Bournemouth (Great Western Railway): £68.30-£127.40 for a single ticket; £69.30-£216.30 for a return ticket. Ticket prices vary according to the route taken the cheaper tickets require 2 changes (at Bristol and Southampton) and the more expensive tickets require only one change (at Reading).
- 3.12 Rail is usually more expensive than coach. When comparing the two modes, passengers may be willing to pay a higher fare for the benefit of accessing more frequent services and a shorter station-to-station journey time (approximately 30-minute journey time saving), although for many people coach might not be considered a suitable option given services are so infrequent.

⁹ https://www.gov.uk/government/speeches/national-bus-fare-cap [accessed 12/12/2024]

- 3.13 It is important to note that some of the railway stations along the study corridors are not centrally located. For example, Cheltenham Spa station is located around a 25-minute walk from the town centre, and Salisbury railway station is around a 12-minute walk from the centre. Bournemouth, Poole and Swindon stations are all centrally located.
- 3.14 The cost per mile for the example coach service is around 16p per mile, compared to 85p per mile for the train journey (based on the average between least and most expensive single fares). This does not factor in additional costs for accessing rail or coach stations/stops if another mode is required or if someone drives and parks at the station where a parking tariff may be applied.

Travelling by car

- 3.15 Another important comparison to make is with a journey made by car. Whilst a new coach service could draw some patronage away from rail by offering cheaper fares, from the perspective of encouraging sustainable travel, there may also be opportunity to attract people away from using the car.
- 3.16 However, it will be difficult for a journey by public transport to compete with the car on door-to-door journey time, given that potentially two or more public transport services and walking at either end may be required to complete the same journey.
- 3.17 A journey by car from outside of Cheltenham Spa railway station to Bournemouth station in the weekday morning period would take between an estimated 2 hours 10 minutes and 2 hours 50 minutes depending on the level of traffic congestion and route taken. Google Journey Planning recommends a route largely using the A417, A419, M4, A34, M27, A31, and A338 (an alternative route via Malmesbury, Devizes and Salisbury has a similar journey time range in the peak period, but has a longer journey time outside of the peak period).
- 3.18 The cost of a journey could be viewed in different ways. When considering the cost of travel, many people will only factor in the cost of fuel.
- 3.19 Based on an estimated 40 miles per gallon for an average ICE car¹⁰ (noting hybrid cars and electric can achieve much higher equivalent mileage) and an average petrol and diesel price of 152 pence/litre¹¹, the following costs are estimated:
 - Cheltenham Spa to Bournemouth (116 miles by road): £20.04
 - Bristol Temple Meads to Bournemouth (92 miles by road): £15.89
- 3.20 This would appear to suggest travelling by car is a lot cheaper than by public transport.
- 3.21 The following example cost of driving have been calculated using HMRC approved mileage rate for cars and vans¹² (up to 10,000 business miles in a tax year) which account for the cost of owning and operating a vehicle, including fuel, depreciation, insurance and road tax:
 - Cheltenham Spa to Bournemouth (116 miles): £52.20
 - Bristol to Bournemouth (92 miles): £41.40
- 3.22 Additional costs could potentially be incurred from parking a car, with a daily cost of parking in Bristol city centre being in the region of £18 for a day¹³ and up to £21.40¹⁴ in peak season (March to October) in Bournemouth.

¹⁰ https://www.swanswaygarages.com/blog/what-is-a-good-mpg-for-a-used-car-in-the-uk/

¹¹ https://www.drivesmart.co.uk/runningcostscar.aspx

¹² https://www.gov.uk/government/publications/rates-and-allowances-travel-mileage-and-fuel-allowances/travel-mileage-and-fuelrates-and-allowances

¹³ https://www.bristol.gov.uk/residents/parking/where-to-park-in-bristol/west-end-long-stay-car-park

¹⁴ https://www.bcpcouncil.gov.uk/parking/find-a-car-park

- 3.23 People commuting by car may however have access to free parking at their place of employment, and this is more likely in areas outside of the city centre.
- 3.24 Park and Ride offers a cheaper way of parking to access Bristol city centre by bus. There is no charge for parking but a bus fare does apply. Using the Park and Ride may increase journey times considering the time it would take to park and board a bus, however many bus routes in Bristol can take advantage of bus priority lanes which help reduce journey times.

Summary

- 3.25 Generally speaking, coach is cheaper than train however passengers need to book in advance to take full advantage of cheaper fares or discounted tickets. It is likely however that because rail and coach stop at fewer locations, another mode of travel would be needed to access them, for example driving/parking, getting a lift by car, taxi, local bus, cycling or walking.
- 3.26 Whilst driving may be viewed as cheaper based on the cost of fuel, when factoring in the full running costs of a car, the cost is more comparable with rail and coach. From the perspective of introducing a new coach service within the corridor, cost of travel will of course be a key factor in people switch to coach from another mode.
- 3.27 Longer distance coach services which run on an infrequent basis are less likely to be used by frequent travellers such as commuters. Passengers may potentially be planning journeys well ahead of time. Such bookings can give operators greater certainty of the level of demand and provides them more flexibility to offer cheaper tickets.
- 3.28 A new coach service operating within the study corridor however may be attracting a mixture of less and more frequent travellers, including people deciding to travel on the spur of the moment, therefore it will be important that whilst fares are competitive to rail, given the reduced certainty of the number of passengers who may be boarding a service, it may be less likely that very reduced fares could be offered to the same extent as those available on long-distance routes.

4. Future developments and transport schemes

4.1.1 This section of the report summarises planned developments situated within Strategic Gaps 1 and 3 which could have an influence on future travel demand and generate travel demand for a new coach service. This chapter also describes planned future transport schemes within the corridor which could influence the routeing and journey times of bus and coach services.

Housing targets

- 4.2 On 30 July 2024, the Ministry of Housing, Communities and Local Government published proposed changes to the National Planning Policy Framework (NPPF), that sets the overall framework for planning policy nationally. Housing is a key priority for the new government, and their targets for new homes changes the quantity and distribution of where housing will be built. Obligatory house building targets for local authorities will be reintroduced.
- 4.3 Nationally, the housebuilding target has been increased from 305,000 dwellings to 370,000 dwellings per year (+21.3%), in order to meet the 1.5 million homes to be delivered over the next five years. The figures for the Western Gateway constituent authorities are shown in the table below (the local authority areas most relevant to the

Strategic Gaps 1 and 3 corridors are highlighted with a Symbol.

Table 1 – Comparison between Western Gateway STB constituent planning authority housing targets based on previous method versus the proposed method

	Previous method (pre-2022)	Proposed method (2024)	% change
Bath and North East Somerset	717	1,466	+104.5
Bournemouth, Christchurch & Poole	2,806	2,962	+5.6
Bristol City	3,378	3,057	-9.5
Orset	1,793	3,230	+80.1
Gloucestershire	3,216	4,620	+43.7
Cheltenham	545	833	+52.8
Cotswolds	504	979	+94.2
Stroud	620	844	+36.1
Forest of Dean	330	597	+80.9
Gloucester	663	732	+10.4
Tewkesbury	554	635	+14.6
North Somerset	1,324	1,587	+19.9
South Gloucestershire	1,317	1,717	+30.4
West of England Combined Authority	5,412	6,240	+15.3
S Wiltshire	1,917	3,476	+81.3

4.4 The above table indicates that all but one local planning authority area will need to cater for additional homes per annum based on the proposed method, with several

authorities experiencing very significant increases of over 80%. Within the Strategic Gaps 1 and 3 corridors, the most significant increases are occurring in Cheltenham, Cotswolds, Dorset and Wiltshire.

Major proposed developments

4.5 A summary of example, large-scale development sites located across the study area is provided below.

Cirencester – The Steadings (planning application reference: 16/00054/OUT)

- 4.6 The Steadings is a proposed urban extension on the south western side of Cirencester, bounded by the A429 Tetbury Road on the western side and the former railway alignment linking the town with Kemble on the eastern side. The development comprises 2,350 homes as well as a neighbourhood centre, 9.1 hectares of employment land and schools. The development will be located just over a mile from the centre of Cirencester, and approximately 2.3 miles from Kemble railway station.
- 4.7 The development is located on the opposite side of town to the main inter-urban road links running between Cheltenham and Swindon, however it is on the main routes connecting Cirencester, Tetbury and Kemble.



Figure 11 – The Steadings Masterplan (west of Cirencester)

Source: https://thesteadingscirencester.co.uk/the-master-plan/

Swindon - New Eastern Villages (NEV) development (planning application reference: various)

- 4.8 The New Eastern Villages (NEV) is one of the largest greenfield developments in the country. It will be located to the east of Swindon, on the eastern side of the A419 which bypasses the town and links to the M4, and located on either side of the Great Western Main Line. It is expected to span around 724 hectares and will comprise 8,000 homes, schools, employment spaces and community and leisure facilities. A series of highway improvements are underway to mitigate the impact of the proposed development.
- 4.9 The development will be at least 2.5 miles from the centre of Swindon and the town's main public transport connections. A new Park and Ride facility is proposed on the A420, approximately 1.8 miles from the junction with the A419. It is likely to be primarily served by local buses running into the centre of Swindon, although it could potentially be a suitable stop for inter-urban buses and coaches bypassing Swindon.

Chippenham – Future Chippenham and relief road

- 4.10 There were significant proposals for around 7,500 new homes and a relief road connecting the A4 and A350 as part of the Future Chippenham scheme. Wiltshire Council received a £75m Housing Growth Fund grant towards implementing the relief road which would have released land for housing development. A reduced scheme was being considered in 2021 which would have brought forward 4,500 new homes.
- 4.11 In 2022, the council halted work on the scheme, citing increasing construction costs ¹⁵.
- 4.12 Development of the scale that had been proposed would have generated significant new travel movements, in particular on the road network, and there would have also been a need for new public transport links. There is potential that inter-urban bus and coach could play a role in connecting the development to other towns within the corridor.

Chippenham – Land at Rawlings Farm (planning application reference: 15/12351/OUT)

4.13 Outline planning permission was granted in 2021 for the construction of up to 650 homes at Rawlings Farm¹⁶, on the eastern edge of Chippenham. The development will comprise around five-hectares of employment-generating land, a primary school and a 10-hectare country park. The site is currently subject to several reserved matters applications and discharge of conditions.

Trowbridge – Ashton Park development (planning application reference: 15/04736/OUT)

4.14 A new 2,500 home development is being built on the southern side of Trowbridge, east of the railway line and north of the A350¹⁷. A development of this scale is unlikely to support significant increases in public transport provision including Park and Ride, however the development will extend Trowbridge out to the A350, therefore potentially inter-urban buses and coaches could call at a stop at the development without needing to route into the centre of Trowbridge.

Warminster – West Warminster Urban Extension (Jubilee Gardens) (planning application reference: various)

- 4.15 Outline planning permission was granted in 2020 for 1,000 homes, called West Warminster Urban Extension, on land adjacent to the A36 which bypasses to the west of Warminster. The development is being developed in phases, with earlier phases already completed and the latest phase now proceeding to construction.
- 4.16 Being a compact town, the development will be under 1.5 miles from Warminster town centre and railway station. The development's location adjacent to the A36 could be an attractive calling point for inter-urban buses and coaches, although services would more likely be routing into/out of the centre of Warminster as this would not represent a significant detour from the main A36/A350 north-south corridor.

Amesbury – King's Gate (planning application reference: various)

4.17 The site is located on the southern edge of Amesbury, just off the A345 which links the town to Salisbury. The site is being built out with earlier phases already occupied and will comprise up to 1,300 new homes.

¹⁵ https://www.gazetteandherald.co.uk/news/23189321.council-calls-halt-75m-future-chippenham-development/

¹⁶ https://summix.com/projects/rawlings-green

¹⁷ https://www.wiltshiretimes.co.uk/news/24730917.developers-agree-major-joint-venture-2-500-homes-ashton-park-site/

4.18 Whilst bus services do not route through the development site, there are several interurban bus routes link to the edge of the site, including the X4 (Salisbury-Larkhill) and X5 (Salisbury-Swindon) routes. There will be opportunity to encourage sustainable inter-urban trips through existing bus services or potential a new coach-based service if it were to use the A345 between Amesbury and Salisbury.

Salisbury – Longhedge Village Extension (planning application reference: 13/00673/OU)

- 4.19 The site is located to the north of Salisbury, adjacent to the A345 which links to Amesbury. The site is currently being built out, with earlier phases already occupied. When complete, the site could comprise as many as 673 dwellings, however an alternative site layout may deliver fewer dwellings.
- 4.20 As with the King's Gate site mentioned above, the Longhedge village extension is well catered for by local bus services, including the X4 (Salisbury-Larkhill) and X5 (Salisbury-Swindon) routes stop on the edge of the development, and therefore there will be opportunity to encourage sustainable inter-urban trips through existing bus services or potential a new coach-based service if it were to use the A345 between Amesbury and Salisbury.

Blandford Forum – Land North East of Blandford Forum (planning application reference: P/OUT/2020/00026)

- 4.21 Proposals have been put forward for an urban extension to the north east of Blandford Forum. A portion of the development will be located north of the A350 which bypasses the town, west of where the A354 links in from Salisbury, and another portion east of the A354 which continues as the bypass around the eastern and southern part of the town.
- 4.22 Presently the whole town is located west of the bypass therefore the development will generate travel movements both along and across the bypass.
- 4.23 Around 17.5 hectares of land has been allocated for housing and 4.5 hectares for employment development according to the development framework masterplan which was prepared in 2016. A 2020 planning application indicated that up to 490 homes are proposed. The planning application was granted approval in Summer 2024.
- 4.24 As it is a modest sized development, it is unlikely to be of a scale to justify major interurban bus or coach links, however the development may present opportunity to create an edge of town stop/interchange for inter-urban bus/coach services to call at without then needing to route via the town centre.



Figure 12 – North East Blandford consultation map

Source:

https://www.wyatthomes.co.uk/northeastblandford/pdf/131 BI 200625 public consultation board.pdf

Dorchester - Land North of Dorchester Garden Community

4.25 This is a designated Garden Community with financial support from central Government and will occupy land to the north of Dorchester, west of the A35 which connects across to Poole and Bournemouth. It is expected to comprise around 3,500 homes and could generate 1,340 jobs¹⁸. Parts of the development will be located over a mile away from the town's two railway stations but it would benefit from being located close to bus routes, including those linking to Weymouth and Blandford Forum.

Poole – Bearwood urban extension (planning application reference APP/19/00237/P)

4.26 Planning permission was granted in 2021 for 695 homes, plus retail units and a care home on green belt land in Knighton to the north of Bournemouth and Poole, close to the A348 which connects the centre of Poole with the A31 which extend on towards Ringwood and Southampton. The A348 route is not used by scheduled coach services operating in Bournemouth and Poole which instead use the A338 route from Ringwood.

Bournemouth – Bournemouth Airport

- 4.27 Expansion of Bournemouth Airport is planned, comprising extension to the terminal building to accommodate an anticipated increase in passengers.
- 4.28 Passenger numbers are forecast to increase to 1.5-1.55 million in 2025-26 and then to 1.7-1.75 million in 2026-27. Much of this is attributed to the Jet2 airline commencing flights from the airport, with Ryanair also announcing commencement of further routes.

¹⁸ https://www.dorsetcouncil.gov.uk/w/garden-communities

- 4.29 Even with the expansion, the airport will still be much smaller than Bristol Airport which had 9.9 million passengers in 2023, although larger than nearby Southampton Airport with around 755,000 passengers in 2023 (CAA Size of UK Airports data, 2023).
- 4.30 Scheduled coach services do not currently link to Bournemouth Airport as there is unlikely to be sufficient daily and year-round passenger numbers to sustain a regular service.
- 4.31 A map showing the locations of the development is presented below.



Figure 13 – Locations of key developments

Future transport schemes

A417 Missing Link

4.32 The A417/A419 provides an important route between Gloucester and Swindon that helps connect the Midlands/North to the South of England. It is an alternative to the M5/M4 route via Bristol. The Missing Link scheme is a three-mile stretch of single-lane carriageway on the A417 between the Brockworth bypass and Cowley Roundabout in Gloucestershire.
4.33 Improvements include 4 miles of new dual carriageway with the current road taken offline away from the existing corridor. Furthermore, there will be new junctions at Shab Hill and near Cowley¹⁹. The scheme is expected to improve journey time and reduce congestion between Cheltenham and Cirencester.

M4 Junction 17 (Stanton St Quintin)

- 4.34 M4 Junction 17 is a key junction providing access from the M4 towards the south coast. The junction provides the vital link between the motorway network and the A350 connecting the towns in west Wiltshire, including Chippenham, Melksham and Trowbridge. It also provides a link to Malmesbury and the A429 in the north, and also allows for local access via the B4122²⁰.
- 4.35 The scheme proposals include:
 - Introduction of traffic signals to all approaches to the roundabout i.e. completion of the full signalisation of the junction.
 - Carriageway widening and additional traffic capacity on all approaches to the junction (M4 off slips, A350, A429 and B4122).
 - Increase in the number of traffic lanes across the motorway bridges from two to three.
 - Widening of the circulatory carriageway and introduction of additional traffic lanes and capacity around the junction.
 - Repositioning of the layby along the A429 to allow for carriageway widening work.

A350 Chippenham Bypass Improvements (Phase 4 and 5)

4.36 The A350 is an important north-south route running through Wiltshire and providing connectivity through to the south coast. Proposed improvements include Bumpers Farm Roundabout improvements on the western outskirts of Chippenham (additional lanes and highway capacity), dualling of the A350 between Chequers to Lackham and dualling of Bumpers Farm to Cepen Park South and finally Lackham roundabout capacity enhancements²¹.

A350 West Ashton/Yarnbrook improvements

- 4.37 This scheme comprises construction of 2.5km of new carriageway, including a link to the Yarnbrook Roundabout which will replace a section of the existing A350 routeing south of Trowbridge through the village of West Ashton.
- 4.38 The scheme is aimed at reducing traffic queues and delays on the A350 corridor at West Ashton and approaching the Yarnbrook Roundabout as well as improving journey time reliability along the corridor, and helping to facilitate housing and employment growth at the Ashton Park development referenced earlier.

A350 Melksham Bypass

4.39 The A350 runs partly through Melksham although part of the town is bypassed. The objective of this scheme is to reduce journey times and delays and improve journey reliability on the A350 through Melksham and Beanacre, improving local and regional north-south connectivity, and supporting future housing and employment growth in the A350 corridor. Furthermore, the scheme is aiming to reduce journey times and delays on the following routes through Melksham and Beanacre:

¹⁹ https://nationalhighways.co.uk/our-roads/south-west/a417-missing-link/

²⁰ https://www.wiltshire.gov.uk/article/6356/Junction-17-M4

²¹ https://www.wiltshire.gov.uk/article/1809/A350-Chippenham-Bypass-Improvements-Phase-4-and-

^{5#:~:}text=Phases%204%20%26%205&text=We%20will%20be%20adding%20additional,northbound%20approach%20to%20the%2 0roundabout.

- A350 South A3102
- A365 West A365 East
- A350 A365 West
- 4.40 Additionally, the scheme intends to provide enhanced opportunities for walking and cycling as well as reduce personal injury accident rates and reduce the volume of the traffic. This includes HGVs passing along the current routes in Northern Melksham and Beanacre to reduce severance²³.

Salisbury Junction Improvements

- 4.41 Wiltshire Council will be carrying out improvements at Harnham Gyratory to increase capacity and improve road safety. A new traffic lane will be added to New Bridge Road in a southbound direction, and changes will be made to the traffic signal timings. Pedestrian and cycleway improvements will include changes to the crossing arrangements at Harnham Gyratory, and a wider pedestrian and cyclist route alongside New Bridge Road into Downton Road.
- 4.42 At Exeter Street Roundabout there will be changes to the lane markings, signing and a traffic island²⁷.

Go-op railway – Swindon-Taunton rail services via Melksham and Trowbridge

- 4.43 The country's first cooperative rail service has been approved by the Office of Road and Rail (ORR) and will operate between Swindon, Taunton and Weston-super-Mare. The approval is subject to the operator demonstrating that it has the finances to begin operations and has secured the necessary rolling stock. Go-op services could start in 2026.
- 4.44 Its cooperative model means the business will be owned by staff, investors and the local community to meet shared needs, and profits will be reinvested back into improving services.
- 4.45 Go-op plans to run eleven daily return weekday services and eight return weekend services between Taunton and Weston-super-Mare, as well as services between Taunton and Westbury, and Taunton and Swindon.
- 4.46 The proposed service will enhance public transport connectivity through part of the Strategic Gaps 1 and 3. For example, a journey by train between Swindon and Castle Cary requires at least 1 change of train (at Taunton), although most options throughout the day requires at least 2 or 3 changes of train.

improvements#:~:text=Pedestrian%20and%20cycleway%20improvements%20will,signing%20and%20a%20traffic%20island.

²³ <u>https://www.wiltshire.gov.uk/highways-a350-melksham-bypass</u>

²⁷ https://www.wiltshire.gov.uk/article/4007/Salisbury-junction-



Figure 14 – Go-op Railway's Planned Swindon to Weston-super-Mare rail route

Source: https://go-op.coop/

Other schemes

- 4.47 Other transport schemes applicable to Strategic Gaps 1 and 3 are identified in the Western Gateway Strategic Investment Plan consultation draft²⁹. These include:
 - Dorset Metro (additional train services between Wareham and Brockenhurst);
 - A350/A303 Two Mile Down Junction Improvements;
 - Heart of Wessex Line Service enhancement;
 - A354 multi-modal corridor improvements south of Dorchester to Weymouth and Portland; and
 - A338 to Wessex Fields, Airport and Aviation Business Park, sustainable access package scheme.

Recently completed

Salisbury Coach Park

- 4.48 Works to upgrade Salisbury Coach Park were completed in late 2024. The coach park is used by scheduled coach services as well as leisure/private hire coaches dropping off visitors to the historic city.
- 4.49 The scheme comprises six coach parking spaces and a 20-minute maximum dwell time. Ten longer-stay bays for layover are located nearby at the central car park. Coach drivers are being advised to remain there until 20 minutes before the pick-up time from where the bays are located.
- 4.50 The scheme also included landscape enhancements and improved routes for pedestrians routeing to/from the coach park.

²⁹ haveyoursaywesterngateway.participatr.io/



Figure 15 – Aerial photo of the upgraded Salisbury Coach Park

Source: https://www.wiltshire.gov.uk/article/10669/Salisbury-Coach-Park-to-reopen-following-extensivemakeover

Summary

- 4.51 A series of housing and employment developments are proposed across the study area, the largest of which are summarised in this report. Many of these developments are located on the edges of settlements and in some cases away from town centres and railway stations and close to major inter-urban roads and bypasses.
- 4.52 The larger developments are more likely to be directly served by new or re-routed local bus services, however there may potentially be opportunity for inter-urban buses and coach services to call at such development at which point onward connections into the centre or other parts of the settlements can be achieved using local buses or walking and cycling routes.
- 4.53 A range of transport schemes are proposed, including a series of highway improvements which could reduce congestion and improve journey time reliability along important north-south routes including the A417 and A350. This could be particularly relevant to inter-urban bus and coach services which are absent along sections of routes like the A350.

5. Scheduled Coach Service Case Studies

- 5.1 To help guide the consideration of a potential new coach service, a series of case study routes have been identified which showcase different characteristics of services such as the locations served and stopping patterns. Services have been categorised as:
 - **'Frequent Journey' services** primarily those serving the London or larger settlements and used by commuters, other regular travellers as well as occasional users;
 - **'International Gateway' services -** specifically catering for airport travellers and these would be applicable to the study corridor with the presence of Bournemouth Airport and the Port of Poole.
 - **'Long Distance' services -** a selection of long-distance coach services operating through the corridor are also identified in this section because they present some interesting characteristics in terms of serving suburban areas, albeit on an infrequent basis.
- 5.3 A fourth service category has been included, this being high quality inter urban bus service routes, some of which are related to the study area and others are relevant in highlighting challenges and potential solutions to improving inter-urban connectivity through better coordinated routes and higher specification of bus vehicles to enhance passenger journey experience.

'Frequent Journey' Coach Services

Centaur (Kent)

- 5.4 Centaur provides a commuter service from Kent to London, with particular focus on the medium-sized towns of Sevenoaks, Tonbridge and Tunbridge Wells. The Centaur service is promoted for its "door to door" service offer that routes through residential suburbs, with the aim of providing a stop within a few minutes' walk of most people in the areas Centaur serves.
- 5.5 The main selling points of Centaur's service are:
 - Convenience and comfort The "door to door" service which, from many locations, is quicker than the equivalent journey by train³⁰. Ticket holders are also guaranteed a seat and WiFi on every service, as the operator claims the specification (capacity) of vehicle used can be adapted from within the operator's fleet to suit demand.
 - Pricing the coach service boasts more favourable prices than the equivalent train journey, with the average commuter using the service saving £2,000 per year, according to the Centaur website³¹ and a day return ranging between £16.50 and £23 (a standard train ticket from Tonbridge is £22.80 each way³²). The service also has a variety of flexible ticket options available that reduce prices further, while tending to the more flexible nature of modern-day working patterns. For example, 10 and 40 ticket bundles can be bought to use in 3 months, or a Flexi ticket with 1, 2 or 3 days per week travel available.

³⁰ https://www.centaurtravel.co.uk/commute-by-coach/whats-it-like

³¹ https://www.centaurtravel.co.uk/commute-by-coach/whats-it-like

³² Trainline ticket search - Anytime day single for £22.80, or £45.60 for an anytime travelcard. Search performed using

https://www.thetrainline.com/en-us, for a journey from Tonbridge to Canary Wharf on the 14th February 2024. The equivalent search for Sevenoaks is £17.30 for a single and £34.60 for a return.

- Better for the environment the Centaur website also highlights the environmental benefits of travelling by coach, with a 35% reduction in CO2 emissions when compared with National Rail³³.
- Journey times The ability of coaches to use priority bus lanes along the journey also makes for a journey that is 20% quicker than the equivalent car journey, and as the services traverse suburbs to pick up passengers, it is believed to be quicker than train from many pick up locations.
- 5.6 Pick up stops are spaced between 400m and 1.5km apart, depending on how densely populated an area is, and the drop off locations in London are at main employment hubs such as Canary Wharf and the City of London.
- 5.7 Centaur run three services; the 786, 788 and the 789, with each serving a slightly different route after beginning in Paddock Wood.
- 5.8 The 786 has three morning services and after a couple of pickups in Paddock Wood and Pembury, skirts around the suburbs of Royal Tunbridge Wells extensively, ending with four stops on the main road in the outer suburb of Southborough. From here, the service stops once in Tonbridge and once in Sevenoaks before heading to London³⁴.
- 5.9 The 788, with two services every morning, covers the areas of Tunbridge Wells that the 786 does not, starting with the Western suburbs of Rusthall and Langton Green, then onto Tunbridge Wells. The second morning service, the 788b, also stops in Southborough and has one stop in Tonbridge and one in Sevenoaks³⁵.



Figure 16 - Drop off locations for Centaur commuter coach services

Source: https://www.centaurtravel.co.uk/

³³ Greenhouse Gas reporting: Conversion factors 2019. Coach journeys produce 27 g CO2 per passenger km, where as National rail produces 41g CO2 per passenger km. Available from: https://www.gov.uk/government/publications/greenhouse-gas-reporting-conversion-factors-2019

³⁴ Centaur 786 Timetable, accessed 24/01/2024: https://www.centaurtravel.co.uk/media/pdf/786-pdf-timetable-v14-702.pdf

³⁵ Centaur 788 Timetable, accessed 24/01/2024: https://www.centaurtravel.co.uk/media/pdf/788-pdf-timetable-v6-625.pdf



Figure 17 - Pick up locations for Centaur commuter coach services

Source: https://www.centaurtravel.co.uk/

Oxford Tube (Oxford)

- 5.10 Although not specifically a commuter service, the Oxford Tube provides a cheap and efficient link between Oxford and London that follows the M40.
- 5.11 The service is very regular, with a coach every 20 minutes, 24 hours a day and 7 days a week, and services increasing to every 10 minutes at peak times.
- 5.12 Oxford, the main source of passenger demand outside of London, has numerous pick up stops in the city and on the London Road out towards Oxford Brookes University and the suburb of Headington. The final Oxford stop is the Thornhill Park and Ride, on the way to the M40.
- 5.13 From here, intermediate stops are only available at Lewknor and Hillingdon, both at stops designed not to take the coach significantly off its route along the M40. The Lewknor stop is in a remote location only accessible by car or local bus.
- 5.14 In the morning, an hourly service stops at High Wycombe Park and Ride, which is also a very short detour from the M40.
- 5.15 The services main drop off points are in London, with all services stopping at Marble Arch and London Victoria, with 3 services an hour stopping at Holland Park in West London and one service an hour going to Baker Street instead of Holland Park.
- 5.16 Most notably, four services a day, all in the morning peak between 06:00am and 09:00am, begin in the rural town of Carterton and call at other towns such as Witney to the North west of Oxford. These services do not go into Oxford at all and rejoin the route described above at Thornhill Park and Ride, highlighting a faster commuter

service for those living further afield than Oxford, removing the long detour into the city centre and retaining competitive journey times.36

5.17 Ticketing for the Oxford Tube is simple, with an adult single for £13 and a return for £20, with a bundle of 12 tickets for £100 also available. Reduced tickets are available for Oxfordshire to High Wycombe (£8), and High Wycombe to London (£10 single), but these are the less frequent services that differ to the core route.



Figure 18 - Oxford Tube service iterations

Source: https://www.oxfordtube.com/

5.18 The Oxford to London corridor is well served by different modes of transport. As well as coach, there are two rail routes into London, one via Bicester Village and High Wycombe to London Marylebone, and one via Reading and Slough to London Paddington.

Arriva X1 and Stagecoach MK1 (Luton/Luton Airport-Milton Keynes)

- 5.19 The Luton-Milton Keynes corridor is already well-served by passenger transport and is also linked by the M1 and A5, both forming part of the Strategic Road Network.
- 5.20 Arriva has operated traditional bus services between the towns for many years, and these services tend to serve all stops along the route, including within the urban areas and in villages in between. The F70/F77 routes via Dunstable and Leighton Buzzard, which are smaller market towns between Luton and Milton Keynes.
- 5.21 Stagecoach had operated a coach service (X99 and prior to that the VT99 under Virgin Trains branding) for many years between Luton Airport, Luton Town Centre and Milton Keynes, until it reconfigured the service as part of a wider service remodelling in the wider region in 2023.
- 5.22 The MK1 service now operates using low-floor double decker buses and is combined with a bus route from Bedford to Luton, forming a large v-shape route covering around 40 miles in total. Whilst the bus service uses a section of the M1 to reduce journey times, within the urban areas it calls at a limited number of stops. Crucially, on route into Milton Keynes it stops at a large industrial park, Magna Park, which attracts a lot of employees from the Luton area.
- 5.23 What is of particular relevance in the context of this study is that Arriva launched a new coach service between Luton Town Centre and Milton Keynes in July 2024, therefore competing directly with the Stagecoach MK1 bus service. The new coach service uses a small fleet of single decker Temsa HD12 coaches equipped with wheelchair accessibility.

³⁶ Oxford Tube Timetable available at: <u>https://tiscon-maps-</u> <u>stagecoachbus.s3.amazonaws.com/Timetables/Oxford_Timetables/Oxford_Tube_current.pdf</u> [accessed 25/01/2024]

- 5.24 The services run on an hourly basis and unlike the MK1 bus, it does not use the M1 and routes into Milton Keynes via the A5 and therefore serving different employment and leisure areas including the city's sports stadium. Neither does the coach service link directly with Luton Airport which is interesting considering it operates using coaches instead of buses with more luggage capacity, and instead terminates at the town centre bus interchange where passengers can travel onwards to the airport via Arriva's local bus services operating within Luton. The use of coach vehicles would appear to be an effort to differentiate the service from the rival MK1 and Arriva's own, stopping bus services running between Luton and Milton Keynes.
- 5.25 The X1 operates over a distance of 21 miles which is a much shorter distance than the full length of Strategic Gap Corridors 1 and 3, and shorter than distances to Bristol City Centre from large settlements like Cheltenham (38 miles), Salisbury (44 miles), Bournemouth and Poole (59 miles).



Figure 19 – Image of the competing MK1 Stagecoach and X1 Arriva services

Source: busandtrainuser.com https://busandtrainuser.com/2024/07/23/mk1-on-the-m1-v-x1-on-the-a5/

Stagecoach X5 and 905 (Oxford-Bedford-Cambridge)

- 5.26 The trend to replace coaches with buses is also evident with Stagecoach services operating between Oxford and Cambridge. Stagecoach currently operates two long-distance bus routes between Oxford and Cambridge the X5 (Oxford to Bedford) and 905 (Bedford to Cambridge). The service used to operate as a single service between Oxford and Cambridge as the X5, and used coach vehicles, but is now operating using low-floor double decker buses.
- 5.27 The overall distance between Oxford and Cambridge of both bus routes combined is around 80 miles, the same distance between Tewkesbury and Bristol Airport at either end of the study corridor. It is understood the bus services still operate on a limited stop basis, similar to the coach service that used to operate, therefore to provide a more attractive journey time.

International Gateway Services

Falcon (Bristol)

- 5.29 The Megabus Falcon is a longer distance route that serves the south west of England, linking Plymouth and Exeter with Bristol and Bristol Airport. The service is marketed primarily as an airport link, but also provides links between more rural locations with Bristol, Exeter and Plymouth.
- 5.30 The service runs 24 hours a day and boasts 20 services a day, 7 days a week. Generally, coaches run every hour, other than at the morning and evening peak hours, where the interval between services is 1 hour and 15 minutes.
- 5.31 Other than the coach stops in Bristol and Plymouth, the intermediate coach stops along the route are optimised to avoid diverting the coach away from faster main roads and into towns. For example, the two stops available in Exeter are at Sowton Park and Ride and at Miller and Carter coach stop near the Honiton Park and Ride. Most notably, both of these stops are within a kilometre of the M537.
- 5.32 The Falcon service also serves smaller settlements in the same way, such as Cullompton, Wellington and Taunton, where stops are located just off junctions of the M5 or adjacent to service stations.

National Express 030 – London-Fareham via Portsmouth Cruise and Ferry Terminal

- 5.33 National Express services call at Portsmouth Cruise and Ferry Terminal, with the 030 route which connects London Victoria and Fareham, with multiple stops in Portsmouth including also a stop adjacent to the historic docks and harbour railway station. Several ferry services operate from the port connecting to Spain and France, as well as international cruises.
- 5.34 Between three and four services National Express services a day call at the Cruise and Ferry Terminal in each direction of travel depending on the day of the week, with a journey time of 2 hours from London which is a similar journey time by train (although the nearest railway station to the International Port is around 2km away). The cheapest single fare from London is £15.00 by coach, compared with £20.00-£38.10 (depending on the service/time of day) by train.

Long Distance Coach

National Express 160/161 Bournemouth-Birmingham

- 5.35 As indicated earlier in this report, Bournemouth is a key transport hub with a more significant concentration of public transport connections towards London via Southampton, and more localised connections towards Salisbury and westwards along the Dorset coast.
- 5.36 National Express provide a regional coach service (the 160/161) linking Bournemouth and Birmingham.
- 5.37 It is important to highlight that the service is infrequent. The 160 has two services in each direction a day (Monday to Sunday), arriving in Bournemouth in the early afternoon and mid evening, and departing Bournemouth late morning and mid-afternoon. The service, which utilises the A34 between Southampton and Oxford, therefore largely routes outside of the Western Gateway STB area and the corridors being looked at in this feasibility study.
- 5.38 The 161 has one service a day in each direction arriving in Bournemouth at around 22:00 and leaving around 08:00, and calls at Swindon and Cheltenham instead of

³⁷ Megabus Falcon Timetable, accessed on 24/01/2024: https://uk.megabus.com/globalassets/falcon/falcontimetable.pdf

Oxford, whilst still routeing via Ringwood and Southampton. The service also utilises the A34 between Southampton and the M4, before routeing towards Swindon, and then uses the A361 towards Burford before using the A40 to route towards Cheltenham.

5.39 The service takes just under 3 hours between Bournemouth and Swindon and just under 4 hours to Cheltenham which is considerably longer than making the journey by car and despite the limited number of stops in between. However, it is important to note that a recommended journey using online journey planning software recommends a longer distance route via the A34 as opposed to geographically more direct route options using A-roads within the study area such as the A338 and A350 as it has a slightly shorter journey time (likely due to using sections of higher speed roads – M4, A34 and M27.

National Express 035 London-Weymouth/Swanage

- 5.40 The National Express' 035 service links London to Bournemouth with 12-16 services a day (depending on the day of the week), with up to 13 services extending onto Poole; 1 service routeing via Bournemouth University, Dorchester and terminating in Weymouth; and 1 service calling at Bournemouth University (Talbot Campus), Wareham, Corfe Castle and terminating in Swanage.
- 5.41 As with the 160/161 service, it is uncertain whether additional services operate during the summer period. For people travelling beyond Poole the service is unlikely to be attractive to frequent travellers, and journey times are longer than a journey by train to Weymouth (4 hours, 20 minutes by coach versus 2 hours 46 minutes by train. Coach fares are much lower, for example £19 for a standard single fare by coach compared with £45.00-£52.50 by train.
- 5.42 The provision of a stop at Bournemouth University, which lies around 2 miles to the north of the town centre, would be a key attraction for students needing an affordable way of travelling longer distances e.g. returning to see family or friends at weekends or at the end of term.
- 5.43 It is understood that National Express can apply summer uplifts to service frequencies on some routes, and that across the whole network, the operator will monitor and review if particular routes/services are filling up and then consider putting on an additional coach to double capacity at that time.
- 5.44 In April 2025 it was announced that FlixBus had entered into a partnership with coach operator Excelsior to introduce a new coach service linking London, Heathrow, Southampton, Bournemouth and Poole. The services are due to commence operation in May 2025.

Berrys Coaches Superfast

- 5.45 Berrys Coaches operate coach service links between towns within the Western Gateway STB area and neighbouring Peninsula Transport STB area to London. Three Superfast Coach services are operated:
 - Superfast 1 runs twice daily, picking up passengers in Wellington, Taunton, North Petherton and Bridgwater
 - Superfast 2 runs twice daily, picking up passengers in Taunton, Ilminster, South Petherton, Yeovil, Ilchester, RNAS Yeovilton and Wincanton
 - Superfast 3 runs a daily service, picking up passengers in Taunton, Othery, Street, Glastonbury, Wells, Shepton Mallet, Frome, Warminster, Codford and Amesbury.
- 5.46 The majority of stops are located within town centres, however there are a few exceptions, notably the stop for Codford which is a small village, with the coach stops

located on the A36 which bypasses the village. The stops are located in laybys and there doesn't appear to be any formal or informal pedestrian crossing facilities for people walking between the Somerset-bound stop and the village.

5.47 The services appear to be targeted towards long distance travellers, notably those travelling into London or out from London to destinations in Wiltshire and Somerset with the operator's website offering visitor guides with the online booking system only permitting journey to or from London (Hammersmith).



Figure 20 – Visitor attraction information on Berrys Coaches website

Source: https://www.berryscoaches.co.uk/

- 5.48 Whilst the online booking tool only permits journeys starting or ending in London, a 'Local Bus Fares' page on the operator's website indicates the fares for shorter journeys on each Superfast route, the majority (at the time of searching in November 2024) being between £2.50 (e.g. Frome to Warminster) and £6.50 (e.g. Taunton to Amesbury).
- 5.49 Return fares to London are considerably cheaper than similar journeys by train, for example an open return fare of £39 irrespective of the journey's origin and despite the furthest east stop at Amesbury being 70 miles closer to London than the furthest west stop at Wellington).
- 5.50 The operator's website provides useful information about how to access coach stops and how visitor attractions can be accessed from the nearest stop.



Figure 21 – Information on coach stops and accessibility provided by Berrys Coaches

Source: https://www.berryscoaches.co.uk/

5.51 Superfast services provide an onboard host who will direct passengers to their seat and offer onboard refreshment services (no such service is provided on National Express or Megabus routes). Coaches are also provided with free Wifi and charging points.

High quality inter-urban bus routes

5.52 A series of case studies have been selected which represent high quality, inter-urban bus routes that are proving popular and provide good connectivity across regions. They operate between urban centres for through journeys but also offer pick-ups in rural areas along the routes. Some of the examples presented operate within the study corridor.

More (Go South Coast) X3 Salisbury to Bournemouth

- 5.53 The long-standing X3 route connects the historic county town of Wiltshire to the south coast holiday resort of Bournemouth and wider conurbation including Bournemouth Hospital.
- 5.54 It is a limited stop service and operates along the A338 corridor through Ringwood. The middle section of the route is along a fast dual carriageway thus providing a faster end-to-end journey.
- 5.55 It has a good frequency of every 30 minutes and an end-to-end journey time of 75 minutes.

5.56 The vehicles used on the route are new high specification Alexander Dennis double deckers in a bespoke livery, with Wi-Fi, high backed comfortable seating and plug-in USB charger points, as shown in the following image.



Figure 22 – Example of a double decker bus used for the X3 route

Source: Geoff Clarke / AECOM

Salisbury Reds (Go South Coast), X5 Salisbury to Swindon

- 5.57 The X5 service connects the historic county town of Wiltshire to the busy commercial centre of Swindon. It operates along the A338 corridor through Amesbury, Pewsey and Marlborough. It provides interchange at Marlborough with two Wiltshire Connect Services, the 110 and 120.
- 5.58 The frequency at the time of writing varies between hourly and every 90 minutes with an end-to-end journey time of just under 2 hours. The service frequency was reduced during the Covid period however it is understood it will be increased to make it hourly throughout the day in the near future.
- 5.59 The service provides a connection in Salisbury with the X3 enabling a passenger to travel all the way along the A338 from Swindon to Bournemouth.
- 5.60 The vehicles used are normally double deckers with plug-in USB charger points. With the combination of the X3 and X5 services, the A338 corridor has probably the best public transport service on any A road between the M4 and the Dorset Coast.

Harrogate Bus Company (Transdev Blazefield), Service 36 Leeds to Harrogate and Ripon

- 5.61 The service connects Yorkshire's commercial centre of Leeds to the spa town and tourist centre of Harrogate and the small cathedral city of Ripon. The service operates along the A61 corridor.
- 5.62 A step change in service improvements led to an increase in patronage of 18% in 2006 alone. The frequency was improved to every 15 minutes between Leeds and Harrogate and more recently this has been further improved to every 10 minutes. One in three services continue through to Ripon offering a half hourly frequency between Harrogate and Ripon.
- 5.63 The vehicles used on the route are high specification double deckers with Wi-Fi, high backed comfortable leather seating and plug-in USB charger points.

5.64 Funding from the UK Government's Zero Emission Bus Regional Area (ZEBRA) scheme was secured in May 2022 to aid Transdev Blazefield and North Yorkshire County Council in the electrification of the route 19 Alexander Dennis Enviro400EV battery electric double-decker buses with pantograph chargers are being delivered to replace the existing diesel Volvo B5TLs buses on this service soon.



Figure 23 – Pantograph charger and example of Enviro 400 EV bus used on the route Source: Geoff Clarke / AECOM



Figure 24 – Interior of the upper deck on Transdev's Witchway bus

Source: Jonathan Welch - CBW (cbwmagazine.com)

5.65 In an article published in Coach and Bus Weekly³⁸ Ray Steening who has had responsibility for marketing the new bus service was quoted as saying "Routes like the

36 are a local bus, but what's the difference between a bus and a coach? They are still passenger carrying vehicles, but one is seen as a bit more luxurious than the other. There's no reason a bus can't be luxurious if that's appropriate to the market it's operating in".

Witchway (Transdev Blazefield), Service X43 Burnley to Manchester

- 5.66 The X43 service connects Central Manchester to Rawtenstall and Burnley. The service operates along the A56/M66/A682 corridor. The middle section of the route uses the motorway network thus providing a faster end-to-end journey of just 80 minutes. The frequency is every 20 minutes.
- 5.67 The vehicles used on the route are high specification double deckers equipped with Wi-Fi, high backed comfortable leather seating and plug-in USB charger points.
- 5.68 The Witchway branding is featured strongly on the buses and related advertising as the route serves villages surrounding Pendle Hill associated with the Lancashire Witches trial in 1612.
- 5.69 The high-quality service has attracted a strong customer base.

More (Go South Coast), Purbeck Breezer, Service 50 Bournemouth to Swanage

- 5.70 The 50 service is one of a group of Purbeck Breezer routes and links two of Dorset's premier seaside resorts and unusually uses the Sandbanks Ferry as part of the route.
- 5.71 The service operates for both the tourist market but also the local communities enroute. The frequency is every half an hour in the summer using open top double deck vehicles and hourly in the winter with the top deck enclosed. The end-to-end journey time is 75 minutes including the ferry crossing.



Figure 25 – Example of a purpose-built Volvo EvoSeti bus used on the Purbeck Breezer route

Source: Geoff Clarke / AECOM

First, Jurassic Coasters, Service X50-54 Weymouth to Swanage/Lyme Regis/Bridport/Axminster

- 5.72 There are various services radiating from Weymouth that serve Jurassic Coast destinations. The times and schedules vary between summer and winter ranging from hourly to every two hours.
- 5.73 The end-to-end journey time from Weymouth to Axminster is around two and a half hours. The services provide community links across South Dorset all year round as well as providing popular enhanced links in the summer. Most services are operated by liveried double deck buses.

Reading Buses, The London Line, Service 702 Legoland and Windsor to London Victoria

5.74 The 702 service links two major tourist attractions to Central London. It operates at both ends on local roads but uses the M4 motorway for the middle section to reduce end-to-end journey time. The service takes two hours from the Legoland Windsor theme park to Victoria and less if from the centre of Windsor to London.



Figure 26 – 702 route from Reading to London via Windsor

Source: https://www.reading-buses.co.uk/services/RBUS/702

- 5.75 Frequency is hourly but interestingly it starts early in the morning for workers to get to the venues. There are connections to service 701 to Reading.
- 5.76 The buses specified by Reading Buses are high quality specification double deckers with Wi-Fi and chargers and holders for smart phones³⁹.

TrawsCymru – longer distance bus network, Wales

5.77 TrawsCymru is the brand name for a large network of long-distance bus services operating across Wales. Funded by the Welsh Government, the network connects larger settlements as well as rural communities where there is no equivalent rail service. The network has continued to evolve and expand and came about as a result of extensive reviews of public transport provision in Wales.

³⁹ <u>https://www.reading-buses.co.uk/services/RBUS/702</u>

5.78 TrawsCymru routes were developed from 2008 onwards to provide long-distance public transport in regions where railways were closed in the Beeching cuts of the 1960s. The main long-distance services are supplemented by shorter routes branded TrawsCymru Connect. Below is an extract of the regional bus network map.



Figure 27 – Extract of the TrawsCymru regional bus network

Source: https://images-transportforwales.passenger-website.com/

- 5.79 The long routes were mainly created by merging shorter routes, usually where services were previously tendered. This has resulted in TrawsCymru aiming to cater for competing needs of passengers making shorter and longer distance journeys.
- 5.80 Many of the routes operate over long distances, for example the T1C route (which is only operates once a day) covers around 115 miles with a journey time of around 4 hours. The more regular T4 service between Newtown and Cardiff has 7-8 services a day, covering a distance of around 100 miles and a journey time of 3 hours and 45 minutes.
- 5.81 Notably in the context of this feasibility study, all of TrawsCymru's services are operated using buses as opposed to coaches. Eight E12s were delivered for the electrification of the TrawsCymru T1 service serving Aberystwyth and Carmarthen in March 2023.
- 5.82 A reported Welsh Assembly commissioned review of TrawCymru in 2019⁴⁰, which highlighted issues including the fact that buses lack on-board toilets and are generally seen as poorly suited to journeys of up to 100 miles; services divert into numerous communities off the main roads and without these diversions those communities might

⁴⁰ https://www.keybuses.com/article/trawscymru-time-radical-

rethink#:~:text=The%20vehicles%20used%20are%20low,communities%20off%20the%20main%20roads.

have no bus service however they add to the overall journey time; that there was no common understanding of what is the role of the TrawsCymru network, with the view taken that TrawsCymru should be placed at Level 1 in a hierarchy of public transport services, and guaranteed connections with local bus services should be backed up by on-call taxis when connections are missed.

- 5.83 The review drew comparisons with Scotland's Citylink services which are coach based, offering a much-increased level of comfort compared to TrawsCymru but it was noted that the low floor buses used in Wales provide better access for the elderly, wheelchair users and parents with buggies.
- 5.84 The review recommended that higher quality vehicles are required than the (then) current fleet of buses if it is to sustain demand for long-distance travel, however low floor access would still be needed, alongside more comfortable seating.



Figure 28 – Example single decker bus used on TrawsCymru network

Source: https://traws.cymru/en/trawscymru-day-ticket

5.85 The Welsh Government has developed an app in conjunction with the TrawsCymru network so passengers can see how much Carbon Dioxide they are saving by using the bus. The saving will be even more once more zero emission buses are introduced across the network.

Summary

- 5.86 A range of coach service case study routes have been identified which represent different types of services and passenger markets catered for. The following key features and observations have been identified through these case studies:
 - Coach services do not need to route into the centre of towns and cities, although this may influence patronage and if they do not terminate in urban centres, they need to connect with high quality local transport services on the outskirts or within the suburbs.
 - Some long distance and frequent traveller coach services are promoted as offering a 'door-to-door' service by calling at closely spaced stops closer to people's homes in suburban areas, much like a local bus service, and then making fewer stops between settlements, and utilising faster moving roads like motorways.
 - Some services make stops in more remote areas including at service stations and adjacent to motorway junctions where there are no formal park and ride facilities. However, this would provide access to more rural communities if people can get a

short lift by car, taxi or bus to the stop, or feel confident enough to cross over a busy road where there may not be a formal crossing facility for pedestrians.

- Service routeing and stopping patterns can vary throughout the day so a single service may call at different stops at different points of the day. This indicates that service timetables can be geared towards certain passenger markets for example serving suburban residential stops in the early morning (outbound) and late evenings (return) would be catering for commuters however the core part of the journey linking the main urban centres is unchanged throughout the day and would serve a wide variety of journey purposes.
- Operators are experimenting with different configurations of vehicles to provide the most cost-effective service, although it may also be influenced by what vehicles the operator has at its disposal within its fleet.
- Coach operators provide information about visitor attractions in the areas they serve, even if their services do not directly access the attractions. Reliance is therefore placed on connectivity between longer distance coach and shorter distance bus services, or walking to reach visitor attractions from coach stops.
- Whether a bus vehicle or coach vehicle may matter less to customers, with Stagecoach replacing coaches for buses even on longer distance routes; Arriva choosing a coach vehicle to differentiate its service from Stagecoach's competing, limited-stop bus-based service; and the Harrogate Bus Company launching a fleet a luxury double-decker buses whose internal configuration blurs the boundaries between a bus and a coach from a passenger experience perspective.
- A regional network of buses operating across Wales offer some routes which reach over 100 miles in length, which is a long journey on a bus which will not provide the same level of comfort as a bus. In practice however, such long routes are potentially being used more for shorter or medium distance journeys as opposed to end-to-end travel.
- Operators are using higher specification bus vehicles on longer distance routes, and services use sections of motorway to reduce journey times.
- 5.87 A set of key coach service features have been identified from the case studies above which are shown in the following table. It may not be achievable for a service to cover all of these features however they are important considerations in the definition of key requirements for a new coach service in the corridor, and the consideration of coach service route options and stopping patterns.

Accessing the heart of major urban centres and key gateways including airports	Serving a limited number of more rural, smaller communities
Avoiding some busy urban centres or congested routes if connections can be made by high quality local transport links	Providing an agile service pattern and timetable, tailored to different passenger markets throughout the day and week
Offering competitive journey times and/or fares compared to rail	Offering a comfortable journey experience which is better than a bus
Serving suburbs to provide more of a door- to-door service	Using faster moving roads in less densely populated areas to reduce journey times over longer distances
Providing incentives to passengers who book tickets in advance including reduced fares and guaranteed seat	Offering ticket bundles/carnet tickets for more regular travellers

Table 2 – Key features of coach services

6. Coach Service Key Requirements

- 6.1 The following key requirements have been developed to shape the assessment of new coach service options.
- 6.2 Reference has been made to the Western Gateway STB Long Term Strategic Transport Plan 2024-2050⁴¹ to consider the overarching priorities and policies that the STB seeks to achieve. This plan has been published since the Coach Strategy was published in 2023.
- 6.3 It will be vital that any type of coach service improvement being considered in this study aligns with the STB's strategic priorities.

The STB aims to prioritise and help facilitate schemes and policies which:

- 1) Have significant impact beyond local boundaries
- 2) Require cross-boundary co-operation and/or delivery
- 3) Improve access to regionally or nationally significant destinations
- 4) Improve access to regionally or nationally significant gateways
- 5) Overcome a severance or connectivity issue that unlocks regional benefits or resilience
- 6) Facilitate strategic movement between the Midlands and South Coast
- 6.4 A new coach service running through the corridor would help to meet all of these aims, for example (1) providing improved transport connections between several key settlements and rural communities; (2) requiring coordination between local authorities as well as the private sector; (3) improving access to major urban centres including Bournemouth; (4) providing better access to the Port of Poole; (5) addressing pockets of poor connectivity within the corridor including between rural communities; and (6) potentially enabling better longer-distance connectivity through better connections to other transport services at key interchanges.
- 6.5 The Long Term Strategic Transport Plan sets out a series of policies or actions which the STB will use to guide its priorities for the future. The following policies are considered to be of more significance in relation to the assessment of coach service improvements within the corridor:

Theme 1: Sustainable growth and economy

- **S4:** Where evidence and local policy supports the introduction of additional measures to manage vehicle traffic and support a shift to sustainable modes, we will work with Local Authorities to ensure a cross-boundary and joined up approach is taken.
- **S6:** We will work with our Local Authorities and key stakeholders to manage seasonal peaks in travel demand, including provision of electric vehicle charging points, enhanced and new regional rail, bus and coach services and improvements to the Strategic and Major Road Networks.
- **S8:** We will work with local and national partners, including other STBs, to improve access to ports and airports for both goods and passengers to/from destinations throughout the UK.

Theme 3: Access to services and opportunities

• **A6:** We will work with coach operators and Local Authorities via our South West Coach Forum to enhance the role of coach in the regional transport offer, take

⁴¹ https://westerngatewaytransport.org.uk/

forward the interventions identified in our 2023 Coach Strategy and establish the feasibility of new strategic coach routes.

- **A8:** We will work with National Highways to shape and deliver regional priorities as part of current and future Road Investment Strategies including M4 to Dorset Coast and Stonehenge, and existing schemes including A417, A303, M5 Junction 9 and Strategic Road Network Urban Areas (Bristol). We will also support Local Authorities to identify and deliver appropriate schemes on the Major Road Network and prepare for future funding opportunities. These schemes should also provide improvements for walking, wheeling and public transport.
- 6.6 The following requirements have been defined which have been informed by the evidence originally set out in the Coach Strategy and earlier in this report, as well as the STB's strategic policies.

Requirement	Justification
(a) To provide an attractive alternative to the private car	The success of a new coach service will be influenced by its ability to attract existing car and rail users. It may also facilitate journeys which currently people are not undertaking because the lack of public transport is a connectivity barrier.
(and potentially also rail) for inter-urban journeys	Providing affordable fares and offering competitive journey times will be key factors in attracting demand, as well as providing new or better connections between places which are not easy to travel between at present.
(b) To enhance rural connectivity, particularly in places which are poorly served by public transport connections to	Aside from the larger settlements within the corridor, there are many smaller rural communities which are not as well connected by public transport, particularly to larger settlements which are spread across the corridor. Residents in these areas may therefore be very dependent on the private car to the nearest large settlement and service centre, or would need to use more than one public transport mode to complete a journey which could increase journey time and cost.
key visitor attractions	Furthermore, many locally and regionally important visitor attractions are located along both corridors which, for those not located in towns or cities, are in many cases poorly connected by public transport and quite car-orientated. Stonehenge is an exception, albeit access by bus is mostly provided via Salisbury.

Table 3 - Key Requirements for a new coach service

(c) To help facilitate interchange between coach and other modes of travel including local bus, Demand Responsive Transit (DRT) and cycle	In order to achieve a competitive journey time compared to other inter-urban modes of travel, a coach service is unlikely to be able to connect lots of different places or make frequent stops. It will be important therefore that coach stops are well connected to other modes, especially where a feeder mode of travel may be required, e.g. cycling, a local bus, DRT or catching a lift by car, as well as major transport interchanges including large railway stations. This could be particularly relevant in places which currently do not have transport interchanges or bus/coach stations, such as in smaller settlements and in rural areas.
(d) To enhance inter-urban, public transport connectivity within suburbs of larger settlements, therefore reducing the number of travel modes to complete journeys	Whilst coaches are more likely to make fewer stops, there may be opportunity to provide stops in suburban areas of larger settlements, including both residential and non-residential areas including large business parks, as a means of improving direct public transport links and reducing the need to interchange or use another form of transport to access a station or stop which is located too far away to walk to/from.
(e) Provide direct connectivity to major destinations and gateways including the Port of Poole and Bournemouth Airport	There is opportunity to enhance connectivity to the Port of Poole (and ferry services to Jersey, Guernsey and St Malo) and Bournemouth Airport (serving a few destinations including Spain). Currently journeys from this area to these key destinations may require travelling on two or more forms of public transport and may make travelling by car the default choice.

7. Coach Service Route Optioneering

- 7.1 A process of optioneering has been undertaken which considers the characteristics of the study corridor including existing public transport provision; road connectivity; and reflecting on the findings from the review of coach service case study routes and the key principles which have emerged from that review. Optioneering has been undertaken across two main stages:
 - (a) Initial concept stage where general configuration of services including broad stopping patterns has been considered to determine the main type of service which could operate within the corridor
 - (b) More detailed optioneering assessment using estimated journey times as the main comparator between different service stopping configurations.

Initial concept stage

7.2 Four broad coach service concepts have been developed. Whilst not intended to accurately depict the sequence of settlements along the study corridors, some important parallels can be drawn such as the 'Large Origin Town' representing Cheltenham, and 'Large Destination Town' representing the Bournemouth-Poole-Christchurch conurbation.

Concept 1



Figure 29 - Concept 1 – Express service concept with limited stops

7.3 Concept 1 represents an express service with limited deviation away from the fastest, shortest route and serving fewer places in between the main origin and destination towns. This concept would minimise journey times but would not be as accessible, increasing the reliance for passengers upon using a feeder mode or travelling further on foot to access the nearest stop which is served by the coach service.

- 7.4 This concept would be similar to the limited number of existing longer-distance coach services operating along the corridor (namely National Express 160), but potentially with some additional rural stops.
- 7.5 Being a limited stop, faster service, this concept route could be more attractive to commuters and people travelling for business who tend to be more time-sensitive.
- 7.6 As highlighted earlier in the report, the quality of A-roads running north-south through the corridor, in particular through parts of Wiltshire and Dorset, may not be conducive to operating express coach services, and this is likely to be a reason for why the National Express 160 route largely avoids these A-roads and instead uses the A34 corridor via Winchester and Southampton.
- 7.7 As depicted by the blue shaded line in the figure above, certain stops could be bypassed at different times of the day, resulting in variations of the main route to serve smaller destinations which are unlikely to generate sufficient patronage to require all services to stop there. This takes inspiration from the Centaur commuter coach service operating in Kent.



Concept 2

Figure 30 - Concept 2 – Express/Semi-Fast service with more frequent stops in larger settlements and limited stops in between

- 7.8 Concept 2 is broadly modelled on commuter coach services described in Chapter 6 of the report, with a collector stage in a large origin town (e.g. Cheltenham) which may comprise several stops including the town centre but crucially also some suburban stops providing a 'door-to-door' type service.
- 7.9 Several route stops could feature between the origin town and the large destination town (Bournemouth) but the emphasis on this intermediate section would be on running a quick service so accessibility to the service in the rural area would be fairly limited, perhaps through the provision of a stop close to a motorway junction or at a rural mobility hub which could serve the wider rural community through the provision of local bus and DRT services (if available), and cycle routes.
- 7.10 Recognising that Bournemouth Airport is not a large airport, it may not be viable to operating a coach service to the airport on a regular basis. The challenge however

would be aligning services to a somewhat limited and spread-out number of flight arrivals and departures throughout the day.





Figure 31 - Concept 3 – Express/Semi-Fast mixed service with more frequent stops in several larger settlements and potential limited detour route variations

- 7.11 Concept 3 is an evolution of Concept 2, the main difference being that more rural places are served in between and may also comprise a series of stops in larger settlement between the main origin and destination towns, e.g. a settlement the size of Swindon or potentially Salisbury could warrant more than one stop.
- 7.12 This might dictate that a slower and more circuitous route would be taken with fewer opportunities to use faster roads, however the coach would plug connectivity gaps by providing direct connections between places which are currently poorly served by public transport.
- 7.13 There may be opportunity to serve more remote destinations or visitor attractions such as Stonehenge or Longleat, on a limited basis, e.g. weekends or summer season only, therefore requiring a detour from the main route.
- 7.14 Furthermore, recognising that there are multiple destination points on the south coast, variants of routes could be provided at certain times of the day or year, with the latter especially relevant to destinations which are more tourism focused such as Weymouth and Swanage.

Concept 4



Figure 32 - Concept 4 – Modified long distance coach service route and stopping pattern

- 7.15 Concept 4 represents a modification of an existing longer distance coach route, which in the case of the study corridors is National Express' 160/161 routes.
- 7.16 The service currently operates on two route configurations, with the 160 service routeing via Oxford, Winchester, Southampton and then terminating in Bournemouth, and the 161 via Cheltenham and Swindon.
- 7.17 To maintain an efficient, fast service, it is unlikely the service will be able to deviate much if at all from the existing route. From Cheltenham to Swindon it may be feasible for the coach to make an additional stop in Cirencester as it is close to the existing A417 route.
- 7.18 Whilst the more direct route from Swindon to Bournemouth via Salisbury using the A345 and A338 is around 26 miles shorter, the journey time is ten minutes longer than the route via the M4, A34, M27 and A31 which also route via Southampton which will be a key destination to serve.
- 7.19 The following table summarises the key pros and cons of the coach service concepts in addition to a simple Red Amber Green (RAG) assessment against the key requirements for a new coach service which are described in Chapter 6, whereby the following apply:
 - Green the coach service concept could fully or substantially achieve the requirement
 - Amber the coach service concept could partially achieve the requirement
 - Red the coach service is unlikely to achieve the requirement

Table 4 - Summary of pros and cons for each coach service concept

Concept 1 - Express service concept with limite away from the fastest, shortest route and serving fe	ed stops: An express service with limited deviation ew places.
Pros	Cons
 Faster service offering more competitive journey times compared with rail and car. Likely to be less costly to operate as the route 	 Limited stops in towns and rural areas would mean people would have further to travel to access the service.
 would use main/fast roads for the shortest and most efficient journey time therefore requiring fewer vehicles. Opportunity to create limited rural stops as 	 Longer access times may make the service less attractive as it will create a similar situation to people needing to access a railway station. Reliance upon some poorer quality A-roads which
mobility hubs catchment area.	may increase journey times.
Coach Service Key Requirements	RAG rating
(a) attractive alternative to the private car	(Green) Could fully or substantially achieve the requirement
(b) rural connectivity & access to visitor attractions	(Amber) Could partially achieve the requirement
(c) facilitate interchange between coach and other modes	(Amber) Could partially achieve the requirement
(d) inter-urban connectivity within suburbs	(Red) Unlikely to achieve the requirement
(e) connectivity to major destinations and gateways	(Green) Could fully or substantially achieve the requirement
Concept 2 - Express/Semi-Fast service with mo limited stops in between: serves a series of colle provide more of a door-to-door service but running	re frequent stops in larger settlements and ctor/drop-off locations in larger settlements to faster between larger towns with fewer rural stops.
Pros	Cons
A collector service pattern will enhance accessibility for more people, with reduced	 Additional stops in suburbs could make the service more costly to operate.
 Opportunity to create limited rural stops as mobility hubs catchment area. Opportunity to connect to an international 	 It may not be efficient to route large coach vehicles along some suburban roads (although chosen route would likely be served by local buses as well)
gateway	 By serving more urban areas, a coach service could be more impacted by local congestion issues.
	 Difficult aligning coach services with limited air arrivals and departures, so the service may not be attractive and well used
Coach Service Key Requirements	RAG rating
(a) attractive alternative to the private car	(Green) Could fully or substantially achieve the requirement
(b) rural connectivity & access to visitor attractions	(Amber) Could partially achieve the requirement
(c) facilitate interchange between coach and other modes	(Green) Could fully or substantially achieve the requirement
(d) inter-urban connectivity within suburbs	(Green) Could fully or substantially achieve the requirement
(e) connectivity to major destinations and gateways	(Green) Could fully or substantially achieve the requirement
Concept 3 - Express/Semi-Fast mixed service w	rith more frequent stops in several larger

settlements and potential limited detour route variations: this concept would service more places, including variations of the core route to serve some stops on a more limited basis (e.g. visitor attraction

or smaller town). Different branches could be provi southern coast.	ded to serve alternative terminating points on the
Pros	Cons
 A collector service pattern across two urban areas will enhance accessibility for more people, with reduced distances to designated stops Opportunity to create limited rural stops as mobility hubs catchment area. Opportunity to respond to seasonal tourism to major attractions and seaside towns 	 Two sets of collector stops in origin towns will increase the journey time and make the service less attractive to people travelling from more northerly origins. Additional stops in suburbs could make the service more costly to operate. By serving more urban areas, a coach service could be more impacted by local congestion issues It may not be efficient to route large coach vehicles along some suburban roads (although chosen route would likely be served by local buses as well) Detours to visitor attractions or alternative seaside destinations will increase journey times
Coach Service Key Requirements	RAG rating
(a) attractive alternative to the private car	(Green) Could fully or substantially achieve the requirement
(b) rural connectivity & access to visitor attractions	(Green) Could fully or substantially achieve the requirement
(c) facilitate interchange between coach and other modes	(Green) Could fully or substantially achieve the requirement
(d) inter-urban connectivity within suburbs	(Green) Could fully or substantially achieve the requirement
(e) connectivity to major destinations and gateways	(Green) Could fully or substantially achieve the requirement
Concept 4 - Modified long distance coach servi modification of National Express 160/161 service	ce route and stopping pattern: represents a
Pros	Cons
• Theoretically the easiest to introduce as it would represent a modification to existing coach services, assuming national operators would be willing to forgo journey time efficiency by making additional stops in places where passenger demand is less certain.	 It is unlikely that an operator would increase the frequency of an existing service or that additional stops would be served at all times of the day. This could put off some passengers who would be attracted by journey speed and a frequent and reliable service. Only a small handful of additional stops could be provided on an existing route. Some might be more remote, e.g. near to towns at roadside services which may be harder to reach.
Coach Service Key Requirements	RAG rating
(a) attractive alternative to the private car	(Green) Could fully or substantially achieve the requirement
(b) rural connectivity & access to visitor attractions	(Red) Unlikely to achieve the requirement
(c) facilitate interchange between coach and other modes	(Amber) Could partially achieve the requirement
(d) inter-urban connectivity within suburbs	(Red) Unlikely to achieve the requirement
(e) connectivity to major destinations and gateways	(Green) Could fully or substantially achieve the requirement

- 7.20 The series of concepts demonstrate the wide variety of service configurations which could be considered for a new coach service within the study corridor and that whilst some parallels can be drawn with existing case study routes, the characteristics of the study corridor may have an influence on what type of service is provided.
- 7.21 Concepts 2 and 3 appear to align more closely with the key requirements for a new coach service. This would indicate that a service which can link some suburban areas and rural communities would be important, as well as connecting to major urban centres, areas of employment and international gateways.

Route stopping patterns and journey time estimates

7.22 In Chapter 2 of the report, a series of corridors were introduced which are aligned to Aroad routes running on a broadly north-south orientation through Strategic Gaps 1 and 3, with common origin/destination points at the northern-most and southern-most end. These corridors are shown together in the following map.



Figure 33 – Summary of the north-south corridors within Strategic Gaps 1 and 3

- 7.23 These corridors comprise combinations of A-roads of varying quality and consistency, and none are served a single road without some form of interruption by way of junctions with other major road routes such as the M4 and A303 or either bypassing settlements or routeing through settlements.
- 7.24 This poses a challenge in forming a coherent, express coach service as it will need to traverse somewhat incoherent routes comprising both free-flowing and more congested roads, and needing to deviate off the main A-roads to intercept key settlements which are bypassed.

- 7.25 Journey times have been estimated based on simple stopping patterns with a single stop in each settlement. Different options have been assessed based on which location on the Dorset coast including Bournemouth-Christchurch-Poole forms the main terminus.
- 7.26 Journey time estimates have been obtained from online journey planning tools and generally take a worst-case journey time to account for traffic congestion i.e. assumes each leg of the journey would occur during a weekday peak period.
- 7.27 The estimates do not directly account for a coach travelling at a slower average speed than a private car which online journey time estimates are likely to be more biased towards.
- 7.28 A dwell time of 2 minutes has been added between each intermediate stop.
- 7.29 Estimated journey times by existing public transport options are also shown the following set of tables. These represent weekday station-to-station journey times and capture the longest journey time option available for a journey starting at 9am. For example, a journey by train from Cheltenham to Bournemouth can be made via Bristol, Bath and Salisbury, or via Reading, Basingstoke and Southampton, with journey times varying by route and time of day.
- 7.30 End-to-end estimated journey times by car are presented below for comparison. These estimates have been obtained from online journey planning tools for a journey starting at 9am during a weekday. The start/end points correspond with stations. The longest, worst case, journey times have been captured, noting that the difference between shortest and longest journey times can be as a much as 1 hour. The route a car would take will not necessarily be the same as the coach route.
- 7.31 The journey time estimates for the western corridor are shown in the following table.

Table 5 - Western Corridor Coach Journey Time Estimates

Western Corridor	
Option 1	
Stop	JT (Mins)
Cheltenham	0
Cirencester	40
Tetbury	24
Bath	70
Frome	45
Castle Cary	37
Yeovil	43
Dorchester	50
Weymouth	22
No of Stops	9
TOTAL JT incl. dwell times	349
Distance (miles)	127
Existing PT journey time	219
No. of changes	2
Car journey time	230
% difference (coach vs PT)	59%
% difference (coach vs car)	52 %

Western Corridor	
Option 2	
Stop	JT (Mins)
Cheltenham	0
Cirencester	40
Tetbury	24
Bath	70
Frome	45
Castle Cary	37
Yeovil	43
Dorchester	50
Swanage	57
No of Stops	9
TOTAL JT incl. dwell times	384
Distance (miles)	149
Existing PT journey time	292
No. of changes (incl. bus)	2
Car journey time	230
% difference (coach vs PT)	32%
% difference (coach vs car)	67%

Western Corridor	
Option 3	
Stop	JT (Mins)
Cheltenham	0
Cirencester	40
Tetbury	24
Bath	70
Frome	45
Castle Cary	37
Yeovil	43
Dorchester	50
Poole	27
Bournemouth	45
No of Stops	10
TOTAL JT incl. dwell times	399
Distance (miles)	150
Existing PT journey time	259
No. of changes	1
Car journey time	190
% difference <mark>(</mark> coach vs PT)	54 %
% difference (coach vs car)	110%

7.32 All options commence in Cheltenham and terminate in Weymouth, Swanage or Poole and Bournemouth. The options utilise sections of the A417, A433, A46, A36, A361, A359 and A37. They all follow the same route and stopping pattern until Dorchester, at which point each option takes a different route to reach the various coastal destinations.

- 7.33 The overall journey time (which includes a 2-minute dwell time at each stop) ranges from 349 minutes to 399 minutes which is significantly longer than journey times by existing rail options which range from 219 minutes to 292 minutes including 1-2 changes required between trains.
- 7.34 In the case of the route to Swanage, part of the journey would need to be undertaken by bus as the town is not on the national rail network.
- 7.35 Journeys by coach would also be longer than journeys by car. Online journey planning tools recommend for a journey between Cheltenham and Weymouth or Swanage to use the M5 between Cheltenham and Taunton then cross-country via Yeovil and Dorchester. For a journey between Cheltenham and Bournemouth, online journey planning tools recommend a route using the A419 skirting Swindon, then the M4, A34, M3 past Winchester, M27 past Southampton, then the A31 and A339 into Bournemouth. These are significantly different routes to those assumed to be used by the coach service along the western corridor which use slower A-roads.
- 7.36 The journey time estimates for the central corridor are shown in the following table.

Central Corridor	
Option 1	
Stop	JT (Mins)
Cheltenham	0
Cirencester	40
Kemble	14
Malmesbury	19
Chippenham	32
Melksham	23
Trowbridge	28
Westbury	19
Warminster	18
Shaftesbury	37
Blandford Forum	30
Dorchester	55
Weymouth	22
No of Stops	13
TOTAL JT incl. dwell times	363
Distance (miles)	118
Existing PT journey time	219
No. of changes	2
Car journey time	230
% difference (coach vs PT)	66 %
% difference (coach vs car)	58%

Table 6 - Central Corridor Coach Journey Time Estimates

Central Corridor	
Option 2	
Stop	JT (Mins)
Cheltenham	0
Cirencester	40
Kemble	14
Malmesbury	19
Chippenham	32
Melksham	23
Trowbridge	28
Westbury	19
Warminster	18
Shaftesbury	37
Blandford Forum	30
Swanage	55
No of Stops	12
TOTAL JT incl. dwell times	339
Distance (miles)	121
Existing PT journey time	290
No. of changes (incl. bus)	3
Car journey time	230
% difference (coach vs PT)	17%
% difference (coach vs car)	47%

Central Corridor	
Option 3	
Stop	JT (Mins)
Cheltenham	0
Cirencester	40
Kemble	14
Malmesbury	19
Chippenham	32
Melksham	23
Trowbridge	28
Westbury	19
Warminster	18
Shaftesbury	37
Blandford Forum	30
Poole	42
Bournemouth	35
No of Stops	13
TOTAL JT incl. dwell times	363
Distance (miles)	115
Existing PT journey time	240
No. of changes	1
Car journey time	190
% difference (coach vs PT)	51%
% difference (coach vs car)	91 %

- 7.37 All options commence in Cheltenham and terminate in Weymouth, Swanage or Poole and Bournemouth. The options utilise sections of the A417, A429, A350. They all follow the same route and stopping pattern until Blandford Forum, at which point each option takes a different route to reach the various coastal destinations.
- 7.38 The overall journey time (which includes a 2-minute dwell time at each stop) ranges from 339 minutes to 363 minutes which is significantly longer than journey times by existing rail options which range from 219 minutes to 290 minutes including 1-3 changes required between trains.
- 7.39 The same car journey times apply to those discussed for the western corridor above, which follow significantly different routes to the route followed by a coach which uses slower A-roads.

7.40 The journey time estimates for the eastern corridor are shown in the following table.

Eastern Corridor	
Option 1a	
Stop	JT (Mins)
Cheltenham	0
Cirencester	40
Swindon	46
Marlborough	42
Tidworth	30
Amesbury	18
Salisbury	32
Ringwood	50
Christchurch	28
Bournemouth	24
Poole	35
No of Stops	11
TOTAL JT incl. dwell times	367
Distance (miles)	117
Existing PT journey time	237
No. of changes	3
Car journey time	190
% difference (coach vs PT)	55%
% difference (coach vs car)	93%

Table 7 - Eastern Corridor Coach Journey Time Estimates

Eastern Corridor	
Option 1b	
Stop	JT (Mins)
Cheltenham	0
Cirencester	40
Swindon	46
Marlborough	42
Tidworth	30
Amesbury	18
Salisbury	32
Ringwood	50
Bournemouth Airport	16
Christchurch	20
Bournemouth	24
Poole	35
No of Stops	12
TOTAL JT incl. dwell times	377
Distance (miles)	120
End-to-end JT by PT	237
No. of changes	3
Car journey time	190
% difference (coach vs PT)	59%
% difference (coach vs car)	98%

- 7.41 All eastern corridor options commence in Cheltenham and terminate in Poole. One option routes via Bournemouth Airport. The options utilise sections of the A417, A346, A338 and A30.
- 7.42 The overall journey time (which includes a 2-minute dwell time at each stop) ranges from 367 minutes to 377 minutes which is significantly longer than journey times by existing rail options which range from 230 minutes to 237 minutes including 2-3 changes required between trains.
- 7.43 As noted earlier in the report, inter-urban bus services already link Cheltenham-Swindon (Stagecoach 51), Swindon-Salisbury (Salisbury Reds X5), and Salisbury-Bournemouth (More X3). Travelling by these three bus routes would take approximately 5 hours and 6 minutes.
- 7.44 The same car journey times apply to those discussed above, which following significantly different routes to the route followed by a coach which uses slower A-roads.
- 7.45 As an aside, for comparison further journey time estimates have been obtained for routes between Bristol City Centre and Dorset coastal towns, and between Bristol Airport and Bournemouth. These are shown below.

Table 8 – Bristol and Bristol Airport to Dorset Coast Coach Journey Time Estimates

Bristol to Dorset Coast	
Option 1	
Stop	JT (Mins)
Bristol	0
Bath	66
Trowbridge	47
Westbury	19
Warminster	18
Shaftesbury	37
Blandford Forum	30
Poole	43
Bournemouth	35
No of Stops	9
TOTAL JT incl. dwell times	313
Distance <mark>(</mark> miles)	82
End-to-end JT by PT	161
No. of changes	1
Car journey time	180
% difference (coach vs PT)	94 %
% difference (coach vs car)	74 %

Bristol to Dorset Coast	
Option 2	
Stop	JT (Mins)
Bristol	0
Bath	66
Trowbridge	47
Westbury	19
Warminster	18
Shaftesbury	37
Blandford Forum	30
Dorchester	55
Weymouth	22
No of Stops	9
TOTAL JT incl. dwell times	312
Distance (miles)	87
End-to-end JT by PT	159
No. of changes	1
Car journey time	170
% difference (coach vs PT)	96%
% difference (coach vs car)	84%

Bristol to Dorset Coast		
Option 3		
Stop	JT (Mins)	
Bristol	0	
Bath	66	
Trowbridge	47	
Westbury	19	
Warminster	18	
Shaftesbury	37	
Blandford Forum	30	
Swanage	55	
No of Stops	8	
TOTAL JT incl. dwell times	288	
Distance (miles)	88	
End-to-end JT by PT	250	
No. of changes (incl. bus)	2	
Car journey time	190	
% difference (coach vs PT)	15%	
% difference (coach vs car)	52%	

Bristol Airport to Dorset Coast	
Stop	JT (Mins)
Bristol Airport	0
Shepton Mallet	50
Bruton	24
Gillingham	28
Shaftesbury	20
Blandford Forum	30
Poole	43
Bournemouth	35
No of Stops	8
TOTAL JT incl. dwell times	246
Distance (miles)	93
End-to-end JT by PT	234
No. of changes	3
Car journey time	180
% difference (coach vs PT)	5%
% difference (coach vs car)	37%

- 7.46 The options from Bristol (Temple Meads station) utilise sections of the A4, A36 and A350. They all follow the same route and stopping pattern until Blandford Forum, at which point each option takes a different route to reach the various coastal destinations.
- 7.47 The route from Bristol Airport to Bournemouth is somewhat different, utilising long sections of B roads crossing Somerset and Dorset. Despite this, the estimated journey time by coach is very similar to that by public transport today (which would include up to 3 changes depending on the route which varies significantly including one rail option via Bristol Temple Meads and Reading, and another rail option via Bristol Temple Meads and Upwey near Dorchester).
- 7.48 The journey time analysis indicates that because the identified coach routes are reliant upon A-roads which are more susceptible to congestion and delays, and will need to deviate off main routes into town centres, they will not provide competitive journey times when compared to existing public transport options or by car.

- 7.49 It is worth noting that many National Express services provide longer journey times compared with rail. For example, the 161 route between Birmingham and Bournemouth takes 70 minutes longer than a journey by train; and the Berrys Superfast 3 service from Taunton to London takes around 105 minutes longer than a train.
- 7.50 National Express services tend to use more sections of motorways and faster moving A-roads. Berrys Superfast coach services have more similarities to the proposed coach service as they stop in smaller settlements and utilise sections of slower A-roads, albeit they also use faster moving motorways and make fewer stops as they head towards London.
- 7.51 Journey times may not be the key determining factor in passengers choosing to travel by coach, compared to fares, and the convenience of not needing to make several interchanges.
- 7.52 The above journey time estimates assume a single stop at each main settlement. No consideration has been made for the potential for additional intermediate stops either in smaller villages along the A-roads, or on the edges of larger towns, i.e. coaches have been assumed to route through the centres of each settlement even if this results in longer journey times.
- 7.53 It is recognised there may be opportunities for a new coach service to avoid some busy, town centre roads and instead make stops outside of town centres or even on the edge of town. However, these locations would still need to be accessible and might only be feasible for smaller towns where it may be possible to reach an out-of-town coach stop within an easy walk.
- 7.54 The following two maps provide an indication of how accessible edge of town stopping locations would be around Warminster which is one example of a small town which is bypassed by the main north-south A-road. The darkest shade of blue indicates a 5-minute estimated walk time (approximately 400m distance). The light shade of red indicates a 20-minute estimated walk time (approximately 1.7km distance).
- 7.55 The following location would be at the junction of the A36 and A362 on the western outskirts of Warminster. This indicates that only a small proportion of the town would be within a 20-minute walk (2,664 estimated population, approximately 15% of the town's population). A 20-minute walk may be considered too long for accessing a coach service 5 minutes/400m is typically used as a benchmark for accessing local bus stops.





7.56 The following location would be at the junction of the A36 and A350 on the southern outskirts of Warminster. This indicates a larger proportion of the town would be within a 20-minute walk (4,235 estimated population, approximately 24% of the town's population).



Figure 35 - Accessibility to an edge-of-town stop to the south of Warminster

7.57 For comparison, the following map shows the accessibility to a coach stop in the centre of Warminster. The town centre is positioned geographically central within the town, although this is not the case in all towns within the corridor. This indicates that a much greater proportion of the town's population would be within a 20-minute walk (approximately 59%). This strongly indicates that whilst it may add more time to a journey, it will be important for coach services to route through town centres as these
will represent the most accessible locations for a larger proportion of a town's population.

7.58 Improvements to nearby footways and crossings would be required to make more remote stopping locations accessible and attractive to walk to/from, whereas stops in town centres will already have good infrastructure provision for pedestrians.



Figure 36 - Accessibility to Warminster Town Centre

8. Travel Demand Assessment

- 8.1 The Western Gateway STB Coach Strategy had used National Highways' South West Regional Traffic Model to assess highway (car) travel demand across the region. This provided a very broad indication of travel movements occurring between key settlements and where the larger volumes of movements were estimated to occur.
- 8.2 The data suggested that Strategic Gaps 1 and 3 included some high volumes of trips between settlements and this was particularly significant given that north-south public transport connectivity is poor.
- 8.3 More detailed travel demand data has been sought to inform this feasibility study, enabling a more granular analysis of trips occurring between small and large settlements within the corridor including from more rural communities which had not been considered as part of the Coach Strategy's analysis.
- 8.4 Access has been provided via the STB to BT's Active Intelligence Rail Portal Data which uses mobile network data to build a detailed picture of how people move across the transport network both by road and also by public transport.
- 8.5 This chapter details the methodology used for gathering travel demand data and then goes on to highlight how this data shows the level of potential demand for a new or increased coach service in the three main corridors (western, central and eastern) as well as a comparison between the three corridors. Furthermore this chapter describes the process of filtering through the data for each corridor including consideration of seasonal variation in demand. Some limitations to the methodology are also briefly outlined.
- 8.6 The broad steps followed in deriving coach service passenger demand estimates are summarised in Figure 37 below and described in more detail in subsequent sections of this chapter.

Step 1: Corridor Definition: Identify 'in-scope' MSOAs covering settlements that would be served by proposed coach service

Step 2: Route Definition: confirm stopping pattern options and boarding / alighting assumptions

Step 3: Total travel demand: extract all travel demand from BT database for 'inscope' MSOAs

Step 4: Assess time of day, mode share and seasonality effects

Step 5: Assess coach service occupancy and consider seasonality effects

Figure 37 - Methodological steps followed to estimate coach passenger demand

Step 1: Corridor Definition: Identify 'in-scope' MSOAs covering settlements that would be served by proposed coach service and Step 2: Route Definition: confirm stopping pattern options and boarding / alighting assumptions

- 8.7 The settlements in the table below have been defined as the main stopping locations where there would be a single stop in each settlement with no rural stops in between.
- 8.8 Cheltenham and Cirencester are common stops in all route options considered, with the three main corridors considers across the middle part of Strategic Gaps 1 and 3. The routes then converge at a set of three coastal destinations: Weymouth, Swanage or Poole, Bournemouth and Christchurch.



Figure 38 - Main stopping locations split up by corridor used for travel demand assessment

- 8.9 Whilst broadly reflecting on the routeing and stopping pattern optioneering findings discussed in the previous chapter, the approach has been guided by passenger demand estimates in exploring and determining optimal coach service routes. Consideration has also been given to existing bus service provision with a view to plotting a route which does not duplicate existing services to a significant extent.
- 8.10 The first step was to identify the Medium Super Output Areas (MSOAs) that fall within the corridor area, with a selection of MSOAs chosen because they contain towns and settlements which this study is focused on.
- 8.11 Therefore, not all MSOAs within the corridor have been used as the basis of the data analysis, for example those overing rural areas which are remote from stops (e.g. would necessitate a lengthy bus or car journey to reach the nearest stop).
- 8.12 A total of 155 MSOAs were captured as part of the demand assessment. These are shown in the following map. MSOAs highlighted red are areas where MSOA(s) cover a much larger area and that the settlements contained within it is not centrally located, therefore this could lead to an overestimate of potential demand. This is most relevant for rural MSOAs which contain a smaller settlement which the coach service options would make a stop in.
- 8.13 There are three locations where a percentage of their MSOA population origin demand is used:

- Kemble (14% of demand)
- Tetbury (62% of demand)
- Castle Cary (37% of demand)

8.14 The data was limited in the granularity that could be extracted to rail time periods, which equate to 4 weeks. This data was then collated together to give annual averages for a twelve month period extending from November 2023 to October 2024.



Figure 39 – Map showing the MSOAs required for assessment with surrounding MSOAs not used in study area

Source: using base mapping supplied by © OpenStreetMap (and) contributors, CC-BY-SA



8.15 The following map shows the MSOAs with the various assessed corridor routes overlayed.

Figure 40 - Map showing the MSOAs required for assessment with surrounding MSOAs not used in study area, and assessed coach service routes

Source: using base mapping supplied by © OpenStreetMap (and) contributors, CC-BY-SA

Step 3: Total travel demand: extract all travel demand from BT database for 'in-scope' MSOAs

8.16 Total Travel demand across all modes between the 155 'in-scope' MSOAs representing the stopping locations were extracted from the database for Weekday AM peak, Weekday Off-peak, Weekday PM peak and Weekend. The total travel demand has then been disaggregated by mode, to consider the proportions classified as road-based, rail and walking. Road-based demand has then formed the basis for estimating coach service demand.

- 8.17 An OD (origin destination) matrix was drawn up between all 29 settlements displaying yearly road-based trips between November 2023 and October 2024. Trips within individual settlements were excluded as this data was not relevant for the analysis, however trips within larger conurbations such as Bournemouth-Christchurch-Poole were included (although the significance of this is discussed later in this chapter).
- 8.18 The total annual demand is presented in Appendix B for each of the main corridors and summarised in the following tables.

Route option	Annual Road-Based Demand
Cheltenham-Weymouth Terminus	3,599,728
Cheltenham-Swanage Terminus	1,776,556
Cheltenham-Bournemouth Terminus	18,276,658
Cheltenham-Bournemouth Terminus (Excluding Bournemouth-Poole internal trips)	2,280,137

Table 9 – Total Annual Road Based Demand Across Western Corridor

Route Option	Annual Road-Based Demand
Cheltenham-Weymouth Terminus	4,041,262
Cheltenham-Swanage Terminus	3,983,988
Cheltenham-Bournemouth Terminus	20,545,541
Cheltenham-Bournemouth Terminus (Excluding Bournemouth-Poole internal trips)	4,549,020

Route Option	Annual Road-Based Demand
Cheltenham-BCP (Including BCP internal trips)	27,081,215
Cheltenham-BCP (Excluding BCP internal trips)	5,426,073

Table 11 – Total Annual Road Based Demand Across Eastern Corridor

Table 12 - Total Annual Road Based Demand Across Bristol-Bournemouth Corridor

Route Option	Annual Road-Based Demand
Including Bournemouth-Christchurch-Poole internal trips	20,074,220
Excluding Bournemouth-Christchurch- Poole internal trips	4,077,699
Excluding Bournemouth-Christchurch- Poole internal trips and Bristol-Bath trips	2,179,591

- 8.19 As indicated in the tables above, consideration has been made of the significance of travel demand occurring within the Bournemouth, Christchurch and Poole conurbation. This was due to the significantly high numbers of trips occurring between these three adjoining settlements which significantly skews the overall level of estimated demand the three towns account for between 77% and 87% of total annual demand across each entire corridor.
- 8.20 The rationale for excluding this portion of demand is that the intended purpose of a new coach service would be to facilitate longer-distance inter-urban travel, and these three adjoining towns are already well-served by local public transport services. In fact, it would be possible to travel on foot and by bike between parts of these three towns. A coach service would therefore not permit boarding and alighting for short distance trips between these towns, only to other places along the route.
- 8.21 It is clear that the level of estimated demand varies significantly between each corridor, both when including and excluding Bournemouth-Christchurch-Poole internal trips.
- 8.22 The Western Corridor shows a low level of estimated travel demand of the three corridors, and only 42% of adjusted demand compared with the Eastern corridor.
- 8.23 Travel demand in the Central Corridor is also influenced by significant travel demand between the Wiltshire towns of Trowbridge, Westbury and Warminster, which accounts for between 35% and 40% of overall corridor demand across the corridor.
- 8.24 These three towns are closely spaced and are already well connected by train and bus. Whilst travel between these towns has not been excluded in the analysis, the coach service would be directly competing with alternative public transport services already available and running more frequently. This weakens the case for a coach service running along the Central Corridor.
- 8.25 The Eastern Corridor has the highest level of estimated demand. It is also the corridor best served by public transport today with inter-urban buses linking Cheltenham-Swindon, Swindon-Salisbury, and Salisbury-Bournemouth, as well as the once-a-day

National Express 160 coach linking Cheltenham and Bournemouth, albeit this routes out of the corridor and indeed the Western Gateway STB region via Swindon, Winchester and Southampton.

- 8.26 The Bristol-Bournemouth corridor shows a lower level of demand once Bournemouth-Christchurch-Poole internal trips are excluded compared with the Central and Eastern Corridors, and this is reduced even further when accounting for a substantial number of trips occurring between Bristol and Bath (47% of demand), two locations which are very well catered for already by a range of public transport options.
- 8.27 Therefore, when compared to the other three corridors, this corridor is showing the weakest potential to support a new coach service.
- 8.28 It is also worth noting that significant parts of the route alignment used for assessment area are already connected by rail. Rail accounts for a notable proportion of all trips between some settlements, for example 30% Bath to Dorchester, 25% Bath to Bristol and 19% Dorchester to Bristol.

Step 4: Assess time of day, mode share and seasonality effects

8.29 Further analysis was then carried out for the Eastern Corridor which shows the highest levels of demand. The analysis broke down the annual road-based demand into the following time periods during weekdays: AM peak (07:00 – 09:59); Off peak (10:00-15:59 and 19:00 – 06:59); PM Peak (16:00 – 18:59). Weekday time period demand is presented Appendix C to Appendix F. Weekend demand is presented in Appendix G. Estimated demand is briefly summarised in the table below.

Table 13 – Summary of Annual Road Based Demand by Time Period – Eastern Corridor excluding Bournemouth-Christchurch-Poole internal trips

Period	Road-based Demand
AM peak - annual	773,224
Off-Peak - annual	2,046,317
PM peak - annual	818,405
AM peak – weekday	3,068
Off-Peak – weekday	8,120
PM peak – weekday	3,428
Full weekday	14,436
Full weekend - annual	1,564,541
Full weekend	30,087

- 8.30 Four % mode share assumptions have been applied to the road-based travel demand to represent the proportions of trips which could be attracted to a new coach service. The four mode share assumptions are 0.5%, 1%, 2% and 5%.
- 8.31 A pre-Covid estimation of proportion of vehicles made by 'inter-urban bus/coach' derived from the DfT's National Travel Survey is 4.51% for the South West⁴³. This may be considered a high proportion in some areas and will be influenced by existing service provision.
- 8.32 For a new coach service to attract up to 5% of road-based travel demand between locations within the study area is likely to require significant marketing and financial incentives such as free tickets or reduced fares. 0.5%-1% of road-based demand may

⁴³ NTS 9916c – average distance travelled by mode, with a 4.51% proportion of distance travelled on buses in the South West of England for 2018-2019.

therefore be considered a more conservative level of estimated demand, and still likely to require substantial marketing and some incentives to boost patronage.

- 8.33 For a new coach service to attract higher road-based travel demand between locations within the corridor is likely to require additional levels of marketing and financial incentives such as free tickets or reduced fares. 2% of road-based demand may therefore be considered a more conservative but realistic level of potential demand.
- 8.34 Demand estimates based on the four mode share scenarios is presented in Appendix C to Appendix G. A summary is presented in the table below.

Table 14 – Total Estimated Coach Demand per Time Period (both directions) along the Eastern Corridor in four mode share scenarios – 0.5%, 1%, 2% and 5% of Road Based Demand

	AM (3 hours)	PM (3 hours)	Off Peak (18 hours)	Full Day (24 hours)	Full Weekend (48 hours)
0.5%	15	16	41	72	150
1%	31	32	81	144	301
2%	61	65	162	289	602
5%	153	229	406	722	1,504

- 8.35 The summary table above, which again excludes trips starting and ending within the Bournemouth-Christchurch-Poole conurbation, demonstrates fairly low levels of estimated cumulative coach service demand across the Eastern Corridor. In the off-peak period, while total demand is greater, this would most likely be spread across the 18hour period rather than being concentrated in a short period of time.
- 8.36 The estimates for the weekend period are of a similar magnitude to a full weekday if flows were assumed to be split evenly between a Saturday and Sunday. The flows could be more evenly spread throughout the day, or potentially there could be more trips during the middle part of the day. A more detailed breakdown cannot be derived from the data source.

Step 5: Assess coach service occupancy and consider seasonality effects

- 8.37 The fifth step in the process was to consider how the above demand in relation to coach service occupancy and number of services required. On closer inspection of travel demand, whilst cumulatively a higher level of demand could be achieved, in practice there are few trips currently making journeys over the full length or significant lengths of the corridor, and there are pockets of high demand between 'adjacent' settlements along the route.
- 8.38 To determine what this means in relation to travel demand across the Eastern Corridor route, an assessment of coach service occupancy was undertaken using the 2% demand across a full day and presented by direction of travel. This is presented in Appendix G.
- 8.39 This indicates that the maximum demand on a single section of the route between two stops is 81 in the southbound direction and 52 in the northbound direction. These estimates exclude trips starting and ending within the Bournemouth-Christchurch-Poole conurbation.
- 8.40 Over the course of an entire day, this would indicate there would not be sufficient demand to support more than two services, assuming an indicative capacity of 50-seats per coach.

8.41 The analysis also indicates that there is a high turnover of passengers per stop, and passengers would generally be travelling along shorter lengths of the route – calculations indicate 82% of trips are over a single length, i.e. boarding at one stop and then alighting at the next (and this excludes trips within Bournemouth-Christchurch-Poole). These short one-stop trips between settlements are likely to already be served by public transport services, with very few gaps in bus service provision or alternative rail provision, the most notable being Shaftesbury-Blandford Forum.

Seasonality effects

- 8.42 Due to the location and the known seasonal attractiveness of the Dorset coastal resorts, seasonal data analysis was drawn up to determine the proportion of trips that occur in the peak summer period to Weymouth, Swanage and Bournemouth as their destination.
- 8.43 This analysis was important as annual data can skew results so for areas which may have seasonal variations a further breakdown of the data is required as it may indicate that the travel demand is not evenly spread throughout the year, and this could have an impact on coach operations.
- 8.44 Analysis took place for data for June, July and August. Due to the BT data being based on rail periods, this data was extracted between mid-May to mid-September.
- 8.45 Table 15 displays the total annual demand and percentage of total demand to Weymouth, Swanage and Bournemouth in the summer months from all key settlements in the study area, i.e. irrespective of specific corridor routes.

	Wey	mouth	Swanage		Bournemouth	
Origin	Total Annual Demand	% Summer Trips	Total Annual Demand	% Summer Trips	Total Annual Demand	% Summer Trips
Cheltenham	304	56.72%	89	100.00%	1,112	43.97%
Cirencester	154	69.68%	24	25.26%	605	61.16%
Tetbury	50	76.42%	32	100.00%	118	45.79%
Bath	2,428	49.56%	544	68.69%	9,210	34.89%
Frome	1,842	59.75%	460	73.48%	2,434	47.29%
Castle Cary	657	51.28%	66	69.26%	540	36.03%
Yeovil	34,797	44.72%	1,092	53.01%	18,534	37.63%
Dorchester	269,596	37.90%	6,535	42.43%	70,614	35.90%
Blandford Forum	6,396	41.80%	1,919	45.03%	54,004	38.50%
Shaftesbury	2,884	46.43%	996	53.32%	23,917	37.59%
Warminster	1,663	62.08%	409	71.01%	5,886	42.07%
Westbury	1,269	52.44%	350	64.46%	2,684	40.98%
Trowbridge	2,072	67.08%	512	70.14%	3,325	53.23%
Melksham	643	61.47%	274	75.90%	965	65.18%
Chippenham	807	58.44%	193	62.26%	1,594	47.99%
Malmesbury	0	0.00%	0	0.00%	138	54.35%
Kemble	8	58.82%	2	26.67%	39	45.91%
Swindon	2,607	63.22%	408	77.57%	12,926	57.48%
Marlborough	306	81.82%	131	79.39%	1,289	53.14%
Tidworth	458	61.23%	84	54.19%	4,467	49.65%
Amesbury	928	58.73%	212	53.00%	13,983	42.11%

Table 15 - Total travel demand and proportion of demand occurring within the summermonths to Weymouth, Swanage and Bournemouth

Salisbury	3,452	45.17%	1,434	60.00%	106,924	40.77%
Ringwood	2,119	44.65%	1,120	48.03%	490,137	38.64%
Christchurch	2,604	45.41%	2,275	46.07%	2,538,036	39.19%
Bournemouth	28,838	37.54%	31,268	46.83%	104,578	38.32%
Poole	60,321	39.39%	98,038	47.80%	73,857	45.40%

- 8.46 The analysis shows in many cases a significant proportion of annual demand occurring in the summer periods, with an average proportion of trips to Weymouth from end of May to mid-September at 52.76%, Swanage at 58.22% and Bournemouth slightly lower at 44.84% (it increases slightly to 45.36% when Christchurch and Poole are excluded from the average calculation).
- 8.47 It is important to note that the absolute numbers of trips are in a lot of cases quite small, for example from Cheltenham and Tetbury to Swanage where 100% of demand occurs in the summer months.
- 8.48 The analysis does however demonstrate the significance of the summer season for the coastal towns, and that public transport should play a key role in enabling people to reach key tourism locations.
- 8.49 This analysis highlights that a coach service would need to reflect the significance of tourism and leisure journeys in peak seasons including the summer months as well as other school holidays. It also indicates that the demand estimates which draws from total annual demand may not be consistent throughout the year, and the estimated occupancies could be higher at certain times of the year and lower in others.

Summary of results

- 8.50 The results demonstrate that across the course of a day a maximum of two coach services could be required however the level of occupancy would vary along the route and there would be a high turnover of passengers, a large proportion of whom would only be using the coach to travel from one settlement to the next. In the majority of instances within the Eastern Corridor, these one-stop journeys would already be catered for by existing inter-urban bus services.
- 8.51 Seasonality effects could have a significant impact on service provision, and the estimates of coach service occupancies could be higher in peak summer months but lower at other times of the year.
- 8.52 It is important to note that road-based demand will already include a proportion of trips made by bus and coach, although given the limited provision of coach services, it is more that only bus service trips will be captured. It is considered there unlikely that a higher mode share of 5% would be achieved, and that 2% may also be considered ambitious given a proportion of road-based demand will already be using buses.
- 8.53 A further point to note is that this assessment has been based on road demand only. However, from some locations a new coach service may also have the potential to attract some existing rail passengers by offering more competitive fares or linking to places more directly than a train, thus eliminating the need for catching a connecting bus.

Limitations of the approach to the assessment

- 8.54 A key issue to note is that the BT data may not record all days of travel movements, and this will vary by origin-destination. There is potential therefore that the study is presenting an underestimate of demand.
- 8.55 A key limitation to the assessment approach is the use of MSOAs as the basis for estimating passenger demand.

- 8.56 It has been assumed for assessment purposes that passengers would have the same level of access to a coach stop regardless of the size of MSOA and where they are travelling to and from within the MSOA, therefore distance to reach the stop, local transport provision and highway network congestion are not considered. In practice however, the level of access will vary across different parts of a MSOA and this is likely to influence passenger demand. This is more relevant to the more rural parts of the corridor covering smaller settlements.
- 8.57 It is noted however that some adjustments have been made to four MSOAs where there was greatest concern the demand may be overestimated.
- 8.58 BT mobile network data is available at LSOA level which if used would allow a more detailed approach to assessing route and stopping pattern options, however it was considered this level of detail was not proportionate to the requirements of this feasibility study.
- 8.59 Consideration had been given to adjusting demand to identify the proportion of a larger, rural MSOA that would be more likely to access a coach based on the distribution of the population, however this approach was not adopted for this assessment.
- 8.60 BT mobile network data does not differentiate between different modes using a road (other than people walking) so the mode split between private motorised vehicle, bus and coach cannot be determined.
- 8.61 The proportion of road-based movements between MSOAs which are currently undertaken by bus or coach could vary and will be influenced in part by the frequency services.
- 8.62 To address this issue, and help ensure that the mode share estimates for coach are not overstated, some shorter distance trips within the large conurbation of Bournemouth-Christchurch-Poole were excluded which has had a significant effect on overall level of estimated demand along routes. No other exclusions have been made along routes.
- 8.63 The assessment does not take into consideration diversion factors (other than assuming demand moves from car to coach), fare and time elasticities, or any ramp up period for demand.
- 8.64 The assessment does not take into account any potential future increases in travel demand. The rationale for this is that the aim would be for a new coach service to be introduced in the short term and therefore there should not be reliance upon potential future increases in demand including that arising from planned developments (the largest of which are described earlier in this report), some of which may not come to fruition for several years.
- 8.65 The assessment does not take account of the effects of increased traffic congestion in the future which may influence journey times for coaches. It also does not take into consideration other operational requirements and costs, for example dead mileage at the start and end of operation where a coach would not be carrying passengers but still incurring running costs, which will be determined by where an operator's depot is located and could influence the specification of service including routeing and stopping pattern.

Next steps – what actions or improvements could still be considered within the study area despite low estimated levels of demand for a new end-to-end coach service

8.66 In light of the key findings from the demand assessment, which has concluded that there is unlikely to be sufficient demand to justify a new coach service serving the entire length of the study area, or at least more than 1 service a day, consideration has been given to a broader spectrum of potential improvements to transport which reflect upon some of the findings from earlier in the report, including existing bus service provision.

8.67 Improvement options have categorised under a series of themes which are described below.

Inter-urban buses:

- 8.68 Parts of the assessed corridors are already well-served by inter-urban bus services, with the greatest end-to-end coverage present in the Eastern Corridor. The following are suggested options for consideration:
 - Enhance existing inter-urban bus services through increased service frequencies, enabling through ticketing and reducing interchange times by aligning timetables on key inter-urban bus routes in the Western Corridor - 51 Cheltenham-Cirencester-Swindon, X5 Swindon-Salisbury, X3 Salisbury-Bournemouth - to enhance connectivity between Cheltenham to Bournemouth via Swindon and Salisbury.
 - Enhance existing inter-urban bus services through increased service frequencies, enabling through ticketing and reducing interchange times by aligning timetables on key inter-urban bus routes in the Central Corridor - 93 Cirencester-Malmesbury, 99 Malmesbury-Chippenham and X34 Chippenham-Trowbridge-Frome – to enhance connectivity between Cirencester and Frome (and onward connections to Bath).
 - Enhance the quality of the on-board journey experience through the upgrade of vehicles to increase comfort, including more comfortable seating (more coach-like buses)
 - Increase service frequencies potentially by introducing limited stop express services at certain times of the day. This could be most applicable to the Eastern Corridor bus routes but could also apply to sections of the Western and Central Corridors.
 - Assess the feasibility of enabling through ticketing in combination with rail services, recognising that multiple modes could be used to complete an overall journey.

National Express coach 161:

- 8.69 The National Express 161 is the only long-distance scheduled coach service routing along the length of Strategic Gaps 1 and 3. The more regular 160 route avoids large swathes of the Eastern Corridor, there missing out places like Cheltenham, Swindon and Salisbury, and results in longer journey times to reach Bournemouth as all services route via Southampton:
 - The NX 161 could take a different route between Cheltenham and Bournemouth via Amesbury and Salisbury instead of Winchester, and route via Poole and then Bournemouth before travelling onto and terminating in Southampton.
 - There would also be opportunity to add a stop for the service in Cirencester either in the town centre or in the suburbs/outskirts of the town.
 - Explore whether an increase in the frequency of the NX 161, e.g. to 2 services a day (noting the demand estimates put forward in this study would suggest that there would not be justification for a more regular service).
 - Extend the NX 160 service, which operates more frequently via Oxford instead of Cheltenham and Swindon, from Bournemouth to Poole to Weymouth/Swanage during the summer peak season, recognising the impact these coastal resorts have on seasonal demand.

Berrys Superfast:

- 8.70 Berrys operates a series of 'east-west' coach routes cutting across Strategic Gaps 1 and 3. There would be opportunity to enhance connectivity between these services and other north-south services where they intercept each other:
 - Enhance interchanges between Berry's Superfast 3 service and north-south interurban bus routes, with key interchanges in Warminster, Codford and Amesbury

- Create an interchange point between Berry's Superfast 3 service and NX161 and/or enhanced X5 service at Amesbury (Berrys stop at Library bus stop)
- Ensure timetable alignment between different operators to promote efficient interchange

Other service gaps and corridor connectivity

- 8.71 There are minor connectivity gaps across the study area. Localised enhancements public transport services could improve connectivity along sections of each assessed corridor:
 - Address service gaps between Shaftesbury and Blandford Forum.

Interchange hubs:

- 8.72 Key places along the assessed routes would play an important role in facilitating onward connectivity, especially if a new end-to-end coach services is not viable and therefore the focus is on improving existing connections along different legs of each route.
 - Enhance interchange facilities at key locations, including Swindon, Salisbury, Trowbridge, Westbury, Warminster, Dorchester and Blandford Forum which would act as key interchange points. This could be achieved through a combination of timetable alignment to allow easy transfer at interchanges as well as physical improvements to stations and stops including shelters, seating and real time information screens.

9. Conclusion and Next Steps

- 9.1 This report covers the findings of a feasibility study of the Strategic Gaps 1 and 3 corridors which broadly link Cheltenham and Bristol to the Dorset Coast including the towns of Weymouth, Swanage, Poole, Bournemouth and Christchurch. The corridors were identified as two of three connectivity gaps in the Western Gateway STB's Coach Strategy (2023) where there are poorer inter-urban connections by public transport whereas an initial assessment of travel demand had indicated there are notable movements of trips occurring parts of each corridor.
- 9.2 The study has taken a closer look at existing transport provision within the corridor, as well as highlight some potential large-scale developments and major transport schemes which could influence transport connectivity.
- 9.3 The study has identified a range of case study coach service routes of differing characteristics, as a way of exploring the types of features a new coach service operating within the study corridor could emulate.
- 9.4 A set of key requirements for a new coach service has been developed, informed by the evidence around existing transport connectivity, case study routes, and the Western Gateway STB's Strategic Long Term Transport Plan policies.
- 9.5 Informed by the key requirements, an optioneering exercise has been conducted to explore potential types of services at both a conceptual level as well as comparing journey times based on more detailed stopping patterns. This has highlighted that end-to-end journey times across the study area could potentially be much longer by coach compared with some existing journey times by rail, even where two or three train services are required to complete an overall journey (and excluding the mode of travel to travel to/from stations at either end). However this is not considered to be unusual for long-distance coach services which typically generate longer journey times to equivalent rail corridor station-to-station journey times.
- 9.6 With the use of mobile phone data sourced from BT via Network Rail, it has been possible to generate an estimate of passenger demand on different potential coach service routes. Crucially the demand data covers all journey purposes. Whilst the assessment approach is simplistic, it provides a snapshot indication of whether or not there is sufficient demand places different places.
- 9.7 A series of corridor routes have been assessed within Strategic Gaps 1 and 3. These routes link together settlements between Cheltenham, Bristol and the Dorset coastal towns, utilising A-roads including the A417, A338 and A350. A Western Corridor routes through places including Frome, Yeovil and Dorchester; a Central Corridor routes through Chippenham, Trowbridge, Shaftesbury and Blandford Forum; and an Eastern Corridor routes through Swindon, Amesbury, Salisbury and Ringwood.
- 9.8 It has been concluded that there is likely to be sufficient demand to sustain up to 1-2 services a day. However, the level of coach vehicle occupancy would vary along the route and there would be a high turnover of passengers at each stop, a large proportion of whom would only be using the coach to travel from one settlement to the next. In the majority of cases these one-stop journeys would already be catered for by existing inter-urban bus services.
- 9.9 Seasonality could also play a major role in the type of service provided therefore it is possible that a more regular service could be supported in the peak summer months to cater for additional day-trips and holiday-trips especially to the Dorset coast and Bournemouth-Christchurch-Poole areas.
- 9.10 The assessment approach has taken a somewhat cautious approach to estimating demand, assuming a share of existing road-based demand only rather than also

assuming a shift from some existing rail trips, as well as assuming that the service would not be used for shorter distance trips by assuming a single stop in each main towns along each route, no stops within rural areas in between the main towns, as well as excluding shorter distance trips within the large Bournemouth-Christchurch-Poole conurbation which appears to skew cumulative demand across each corridor.

9.11 With the key conclusions in mind, a broader perspective has been given to potential improvements which could be made to existing public transport services and routes across the study area. These include the following:

Inter-urban buses:

- Enhance existing inter-urban bus services through increased service frequencies, enabling through ticketing and reducing interchange times by aligning timetables on key inter-urban bus routes, e.g. 51 Cheltenham-Cirencester-Swindon, X5 Swindon-Salisbury, X3 Salisbury-Bournemouth, and 93 Cirencester-Malmesbury, 99 Malmesbury-Chippenham and X34 Chippenham-Trowbridge-Frome
- Enhance the quality of the on-board journey experience
- Increase service frequencies potentially
- Assess the feasibility of enabling through ticketing in combination with rail services.

National Express coach 161:

• Enhance the only north-south scheduled coach service operating within the study area – the NX 161, including potentially altering its route via Amesbury and Salisbury instead of Winchester, and route via Poole and then Bournemouth before travelling onto and terminating in Southampton. There would also be opportunity to add a stop for the service in Cirencester

Berrys Superfast:

• Berrys operates a series of 'east-west' coach routes cutting across Strategic Gaps 1 and 3. There would be opportunity to enhance connectivity between these services and other north-south services where they intercept each other.

Other service gaps and corridor connectivity

• There are minor connectivity gaps across the study area. Localised enhancements to public transport services could improve connectivity along sections of each assessed corridor including between Shaftesbury and Blandford Forum.

Interchange hubs:

- Enhance interchange facilities at key locations, including Swindon, Salisbury, Trowbridge, Westbury, Warminster, Dorchester and Blandford Forum which would act as key interchange points.
- 9.12 As a next step, it is recommended that the findings of this feasibility study are shared with the local authorities, coach operators, Bristol Airport, Bournemouth Airport, National Highways, neighbouring STBs (Peninsula Transport, England's Economic Heartland and Transport for South East), Poole Harbour Commissioners, and DfT as part of the Western Gateway STB's Coach Forum.

Appendices

- Appendix A Public Transport Service Availability and Journey Times
- Appendix B Total Annual Road-Based Demand by Corridor
- Appendix C Eastern Corridor Time Period Demand (AM peak)
- Appendix D Eastern Corridor Time Period Demand (PM peak)
- Appendix E Eastern Corridor Time Period Demand (Off peak)
- Appendix F Eastern Corridor Time Period Demand (Full Day)
- Appendix G Boardings and Alightings by Stop Full Weekday (Eastern Corridor)

Appendix A – Public Transport Service Availability and Journey Times

Western Corridor

						Inter-urban
			Rail (direct and	l indirect	Coach (direct	Bus (direct
Sottlomont A	Sottlomont P	Distance (miles)		S) Changes	Services only)	Services only)
Settlement A			Journey Time	Changes	Journey mile	
Bath	Frome	11	00:38	0	No direct service	00:47
Bath	Castle Cary	21	00:55	0	No direct service	No direct service
Bath	Yeovil	33	01:08	0	No direct service	No direct service
Bath	Dorchester	4/	01:44	0	No direct service	No direct service
Bath	Weymouth	54	02:05	0	No direct service	No direct service
Bristol	Bath	11	00:11	0	No direct service	No direct service
Bristol	Frome	20	00:56	0	No direct service	No direct service
Bristol	Castle Cary	26	01:14	0	No direct service	No direct service
Bristol	Yeovil	35	01:27	0	No direct service	No direct service
Bristol	Dorchester	52	02:03	0	No direct service	No direct service
Bristol	Weymouth	59	02:24	0	No direct service	No direct service
Castle Cary	Yeovil	11	00:12	0	No direct service	00:43
Castle Cary	Dorchester	26	00:48	0	No direct service	No direct service
Castle Cary	Weymouth	33	01:09	0	No direct service	No direct service
Dorchester	Weymouth	7	00:14	0	No direct service	00:27
Dorchester	Poole	20	00:28	0	No direct service	No direct service
Dorchester	Bournemouth	24	00:46	0	01:00	No direct service
Frome	Castle Cary	13	00:16	0	No direct service	No direct service
Frome	Yeovil	24	00:30	0	No direct service	No direct service
Frome	Dorchester	36	01:05	0	No direct service	No direct service
Frome	Weymouth	43	01:27	0	No direct service	No direct service
Poole	Bournemouth	7	00:12	0	00:25	00:34
Weymouth	Poole	22	00:47	0	No direct service	No direct service
Weymouth	Bournemouth	26	00:53	0	01:20	No direct service
Yeovil	Dorchester	18	00:34	0	No direct service	01:06
Yeovil	Weymouth	24	00:55	0	No direct service	No direct service
Bath	Poole	49	02:41	1	No direct service	No direct service
Bath	Pourpomouth	45 E0	02:41	1	No direct service	No direct service
Briatal	Doolo	50	02.20	1	No direct service	No direct service
Diistol	Poole	57	02:54	1	No direct service	No direct service
Bristol	Bournemouth	59	02:40	1	No direct service	No direct service
Cheltenham	Bath	38	01:05	1	01:45	No direct service
Cheltenham	Frome	47	02:31	1	No direct service	No direct service
Cheltenham	Dorchester	83	03:32	1	No direct service	No direct service
Cheltenham	Weymouth	91	03:49	1	No direct service	No direct service
Castle Cary	Poole	35	01:46	2	No direct service	No direct service
Castle Cary	Bournemouth	38	01:58	2	No direct service	No direct service

Cheltenham	Castle Cary	59	02:24	2	No direct service	No direct service
Cheltenham	Yeovil	70	03:01	2	No direct service	No direct service
Cheltenham	Poole	82	03:34	2	No direct service	No direct service
Cheltenham	Bournemouth	82	03:21	2	03:30	No direct service
Frome	Poole	38	02:03	2	No direct service	No direct service
Frome	Bournemouth	40	02:15	2	No direct service	No direct service
Yeovil	Poole	32	01:32	2	No direct service	No direct service
Yeovil	Bournemouth	36	01:44	2	No direct service	No direct service
Cheltenham	Cirencester	13	No service	No service	00:30	00:39
Cheltenham	Tetbury	19	No service	No service	No direct service	No direct service
Cirencester	Tetbury	10	No service	No service	No direct service	00:36
Cirencester	Bath	27	No service	No service	No direct service	No direct service
Cirencester	Frome	37	No service	No service	No direct service	No direct service
Cirencester	Castle Cary	49	No service	No service	No direct service	No direct service
Cirencester	Yeovil	61	No service	No service	No direct service	No direct service
Cirencester	Dorchester	73	No service	No service	No direct service	No direct service
Cirencester	Weymouth	79	No service	No service	No direct service	No direct service
Cirencester	Poole	69	No service	No service	No direct service	No direct service
Cirencester	Bournemouth	69	No service	No service	No direct service	No direct service
Tetbury	Bath	20	No service	No service	No direct service	No direct service
Tetbury	Frome	29	No service	No service	No direct service	No direct service
Tetbury	Castle Cary	41	No service	No service	No direct service	No direct service
Tetbury	Yeovil	52	No service	No service	No direct service	No direct service
Tetbury	Dorchester	65	No service	No service	No direct service	No direct service
Tetbury	Weymouth	72	No service	No service	No direct service	No direct service
Tetbury	Poole	64	No service	No service	No direct service	No direct service
Tetbury	Bournemouth	65	No service	No service	No direct service	No direct service

Central Corridor

			Rail (direct and service	l indirect s)	Coach (direct services only)	Inter-urban Bus (direct services only)
Settlement A	Settlement B	Distance (miles)	Journey Time	Changes	Journey Time	Journey Time
Cheltenham	Kemble	16	00:49	0	No direct service	No direct service
Chippenham	Melksham	6	00:09	0	No direct service	00:25
Chippenham	Trowbridge	11	00:19	0	No direct service	00:48
Chippenham	Westbury	14	00:27	0	No direct service	No direct service
Melksham	Trowbridge	5	00:05	0	No direct service	00:23
Melksham	Westbury	8	00:19	0	No direct service	No direct service
Trowbridge	Westbury	4	00:07	0	No direct service	00:21
Trowbridge	Warminster	8	00:16	0	No direct service	00:54
Westbury	Warminster	4	00:09	0	No direct service	00:27
Cheltenham	Chippenham	30	01:32	1	No direct service	No direct service
Cheltenham	Melksham	36	01:41	1	No direct service	No direct service
Cheltenham	Trowbridge	40	01:30	1	No direct service	No direct service
Cheltenham	Westbury	44	01:43	1	No direct service	No direct service
Cheltenham	Warminster	48	01:41	1	No direct service	No direct service
Kemble	Chippenham	15	00:45	1	No direct service	No direct service
Kemble	Melksham	21	00:50	1	No direct service	No direct service
Kemble	Trowbridge	26	01:05	1	No direct service	No direct service
Kemble	Westbury	30	01:14	1	No direct service	No direct service
Kemble	Bournemouth	66	02:28	1	No direct service	No direct service
Chippenham	Warminster	18	00:40	1	No direct service	No direct service
Melksham	Warminster	12	00:30	1	No direct service	No direct service
Trowbridge	Bournemouth	44	01:56	1	No direct service	No direct service
Westbury	Poole	38	02:14	1	No direct service	No direct service
Westbury	Bournemouth	40	01:47	1	No direct service	No direct service
Warminster	Poole	35	02:05	1	No direct service	No direct service
Warminster	Bournemouth	36	01:50	1	No direct service	No direct service
Cheltenham	Poole	82	03:34	2	No direct service	No direct service
Cheltenham	Bournemouth	82	03:15	2	03:30	No direct service
Kemble	Warminster	33	01:25	2	No direct service	No direct service
Kemble	Poole	66	02:52	2	No direct service	No direct service
Chippenham	Poole	52	02:40	2	No direct service	No direct service
Chippenham	Bournemouth	52	02:25	2	No direct service	No direct service
Melksham	Poole	46	02:26	2	No direct service	No direct service
Melksham	Bournemouth	47	02:22	2	No direct service	No direct service
Trowbridge	Poole	43	02:22	2	No direct service	No direct service
Cheltenham	Cirencester	13	No service	No service	00:30	00:39
Cheltenham	Malmesbury	22	No service	No service	No direct service	No direct service
Cheltenham	Shaftesbury	62	No service	No service	No direct service	No direct service
Cheltenham	Blanford Forum	72	No service	No service	No direct service	No direct service

Cheltenham	Swanage	89	No service	No service	No direct service	No direct service
Cirencester	Kemble	4	No service	No service	No direct service	00:14
Cirencester	Malmesbury	11	No service	No service	No direct service	00:49
Cirencester	Chippenham	19	No service	No service	No direct service	No direct service
Cirencester	Melksham	25	No service	No service	No direct service	No direct service
Cirencester	Trowbridge	29	No service	No service	No direct service	No direct service
Cirencester	Westbury	33	No service	No service	No direct service	No direct service
Cirencester	Warminster	36	No service	No service	No direct service	No direct service
Cirencester	Shaftesbury	50	No service	No service	No direct service	No direct service
Cirencester	Blanford Forum	60	No service	No service	No direct service	No direct service
Cirencester	Swanage	76	No service	No service	No direct service	No direct service
Cirencester	Poole	69	No service	No service	No direct service	No direct service
Cirencester	Bournemouth	69	No service	No service	No direct service	No direct service
Kemble	Malmesbury	7	No service	No service	No direct service	00:32
Kemble	Shaftesbury	47	No service	No service	No direct service	No direct service
Kemble	Blanford Forum	57	No service	No service	No direct service	No direct service
Kemble	Swanage	74	No service	No service	No direct service	No direct service
Malmesbury	Chippenham	9	No service	No service	No direct service	00:32
Malmesbury	Melksham	15	No service	No service	No direct service	No direct service
Malmesbury	Trowbridge	19	No service	No service	No direct service	No direct service
Malmesbury	Westbury	23	No service	No service	No direct service	No direct service
Malmesbury	Warminster	26	No service	No service	No direct service	No direct service
Malmesbury	Shaftesbury	40	No service	No service	No direct service	No direct service
Malmesbury	Blanford Forum	50	No service	No service	No direct service	No direct service
Malmesbury	Swanage	68	No service	No service	No direct service	No direct service
Malmesbury	Poole	60	No service	No service	No direct service	No direct service
Malmesbury	Bournemouth	60	No service	No service	No direct service	No direct service
Chippenham	Shaftesbury	32	No service	No service	No direct service	No direct service
Chippenham	Blanford Forum	41	No service	No service	No direct service	No direct service
Chippenham	Swanage	59	No service	No service	No direct service	No direct service
Melksham	Shaftesbury	26	No service	No service	No direct service	No direct service
Melksham	Blanford Forum	35	No service	No service	No direct service	No direct service
Melksham	Swanage	53	No service	No service	No direct service	No direct service
Trowbridge	Shaftesbury	22	No service	No service	No direct service	No direct service
Trowbridge	Blanford Forum	32	No service	No service	No direct service	No direct service
Trowbridge	Swanage	50	No service	No service	No direct service	No direct service
Westbury	Shaftesbury	18	No service	No service	No direct service	No direct service
Westbury	Blanford Forum	28	No service	No service	No direct service	No direct service
Westbury	Swanage	46	No service	No service	No direct service	No direct service
Warminster	Shaftesbury	14	No service	No service	No direct service	No direct service
Warminster	Blanford Forum	24	No service	No service	No direct service	No direct service
Warminster	Swanage	42	No service	No service	No direct service	No direct service
Shaftesbury	Blanford Forum	10	No service	No service	No direct service	01:02
Shaftesbury	Swanage	29	No service	No service	No direct service	No direct service
Shaftesbury	Poole	22	No service	No service	No direct service	No direct service
Shaftesbury	Bournemouth	24	No service	No service	No direct service	No direct service

Blanford Forum	Swanage	20	No service	No service	No direct service	No direct service
Blanford Forum	Poole	13	No service	No service	No direct service	00:35
Blanford Forum	Bournemouth	16	No service	No service	No direct service	No direct service
Swanage	Poole	8	No service	No service	No direct service	01:11
Swanage	Bournemouth	9	No service	No service	No direct service	00:56

Eastern Corridor

		Distance	Rail (direct an service	d indirect es)	Coach (direct services only)	Inter-urban Bus (direct services only)
Settlement A	Settlement B	(miles)	Journey Time	Changes	Journey Time	Journey Time
Cheltenham	Swindon	27	00:57	0	00:55	No direct service
Christchurch	Bournemouth	5	00:08	0	No direct service	00:29
Cheltenham	Salisbury	59	02:03	1	No direct service	No direct service
Swindon	Salisbury	34	01:17	1	No direct service	01:59
Swindon	Bournemouth	58	02:01	1	02:30	No direct service
Salisbury	Christchurch	23	01:39	1	No direct service	No direct service
Salisbury	Bournemouth	24	01:17	1	No direct service	01:12
Cheltenham	Christchurch	82	03:36	2	No direct service	No direct service
Cheltenham	Bournemouth	82	03:20	2	03:30	No direct service
Swindon	Christchurch	57	02:18	2	No direct service	No direct service
Cheltenham	Marlborough	36	No service	No service	No direct service	No direct service
Cheltenham	Tidworth	49	No service	No service	No direct service	No direct service
Cheltenham	Amesbury	52	No service	No service	No direct service	No direct service
Cheltenham	Ringwood	74	No service	No service	03:10	No direct service
Cheltenham	Bournemouth Airport	78	No service	No service	No direct service	No direct service
Cirencester	Swindon	13	No service	No service	00:25	01:01
Cirencester	Marlborough	23	No service	No service	No direct service	No direct service
Cirencester	Tidworth	35	No service	No service	No direct service	No direct service
Cirencester	Amesbury	38	No service	No service	No direct service	No direct service
Cirencester	Salisbury	45	No service	No service	No direct service	No direct service
Cirencester	Ringwood	60	No service	No service	No direct service	No direct service
Cirencester	Bournemouth Airport	65	No service	No service	No direct service	No direct service
Cirencester	Christchurch	68	No service	No service	No direct service	No direct service
Cirencester	Bournemouth	69	No service	No service	No direct service	No direct service
Swindon	Marlborough	10	No service	No service	No direct service	00:38
Swindon	Tidworth	23	No service	No service	No direct service	No direct service
Swindon	Amesbury	27	No service	No service	No direct service	No direct service
Swindon	Ringwood	49	No service	No service	No direct service	No direct service
Swindon	Bournemouth Airport	54	No service	No service	No direct service	No direct service
Marlborough	Tidworth	13	No service	No service	No direct service	00:33
Marlborough	Amesbury	18	No service	No service	No direct service	No direct service
Marlborough	Salisbury	25	No service	No service	No direct service	No direct service
Marlborough	Ringwood	40	No service	No service	No direct service	No direct service
Marlborough	Bournemouth Airport	45	No service	No service	No direct service	No direct service
Marlborough	Christchurch	55	No service	No service	No direct service	No direct service
Marlborough	Bournemouth	49	No service	No service	No direct service	No direct service
Tidworth	Amesbury	7	No service	No service	No direct service	00:34
Tidworth	Salisbury	13	No service	No service	No direct service	00:45
Tidworth	Ringwood	27	No service	No service	No direct service	No direct service
Tidworth	Bournemouth Airport	32	No service	No service	No direct service	No direct service

Tidworth	Christchurch	35	No service	No service	No direct service	No direct service
Tidworth	Bournemouth	37	No service	No service	No direct service	No direct service
Amesbury	Salisbury	7	No service	No service	No direct service	00:25
Amesbury	Ringwood	22	No service	No service	No direct service	No direct service
Amesbury	Bournemouth Airport	27	No service	No service	No direct service	No direct service
Amesbury	Christchurch	30	No service	No service	No direct service	No direct service
Amesbury	Bournemouth	31	No service	No service	No direct service	No direct service
Salisbury	Ringwood	15	No service	No service	No direct service	00:39
Salisbury	Bournemouth Airport	20	No service	No service	No direct service	No direct service
Ringwood	Bournemouth Airport	6	No service	No service	No direct service	No direct service
Ringwood	Christchurch	8	No service	No service	No direct service	No direct service
Ringwood	Bournemouth	10	No service	No service	No direct service	00:30
Christchurch	Bournemouth Airport	4	No service	No service	No direct service	No direct service
Bournemouth	Bournemouth Airport	4	No service	No service	No direct service	00:35

Appendix B - Total Annual Road-Based Demand by Corridor

Western Corridor

O/D	Cheltenham	Cirencester	Tetbury	Bath	Frome	Castle Cary	Yeovil	Dorchester	Weymouth	Swanage	Bournemouth	Poole
Cheltenham	-	186,545	31,836	23,945	1,256	498	1,110	342	1,282	161	2,542	2,216
Cirencester	192,031	-	174,745	10,921	852	134	411	94	438	142	1,283	994
Tetbury	20,997	109,338	-	15,398	819	110	188	81	145	44	254	175
Bath	24,319	10,884	25,651	-	196,858	9,254	15,065	2,543	7,261	1,069	11,963	12,472
Frome	1,284	791	1,375	206,412	-	13,938	17,920	1,477	3,686	700	3,615	3,420
Castle Cary	193	52	65	3,691	5,438	-	61,080	1,003	1,391	104	718	855
Yeovil	1,131	333	214	15,307	17,938	165,184	-	77,862	87,474	2,201	21,569	26,263
Dorchester	425	155	67	2,544	1,318	2,697	79,954	-	834,746	15,402	61,344	124,814
Weymouth	1,338	368	307	7,128	3,879	3,758	88,428	822,026	-	23,069	93,779	168,794
Swanage	214	93	45	1,257	755	280	1,933	16,083	25,346	-	73,667	178,979
Bournemouth	2,449	1,129	485	12,023	3,460	1,512	20,167	59,861	88,554	66,772		8,057,728
Poole	2,313	1,005	476	11,653	3,044	2,171	25,662	122,156	172,871	205,091	7,938,793	
										TOTAL – Wey	mouth Terminus	3,599,728
						TOTAL – Swanage Terminus					1,776,556	
						TOTAL – Bournemouth/Poole Terminus					18,276,658	
						TOTAL – Bo	ournemouth/	Poole Terminus	excluding int	ernal trips with	in Bournemouth	2,280,137

The core section of the corridor route without variation is indicated by the green coloured outline.

The Bournemouth and Poole internal demand is indicated by the red-coloured dotted outline. This accounts for 88% of total annual two-way travel demand within the corridor

O/D	Cheltenham	Cirencester	Blandford Forum	Shaftesbury	Warminster	Westbury	Trowbridge	Melksham	Chippenham	Malmesbury	Kemble	Weymouth	Swanage	Bournemouth	Poole
Cheltenham	-	186,545	91	274	746	723	2,268	1,002	6,376	9,776	42,667	1,282	161	2,542	2,216
Cirencester	192,031	-	73	162	639	930	1,685	2,117	13,873	98,837	582,465	438	142	1,283	994
Blandford Forum	128	48	-	33,437	805	318	589	237	160	41	39	16,699	4,262	54,013	142,777
Shaftesbury	236	224	32,622	-	15,595	3,582	2,595	648	756	57	38	6,933	1,868	24,044	30,821
Warminster	830	927	875	15,945	-	227,200	140,273	15,759	11,855	520	502	3,187	619	7,104	7,638
Westbury	733	1,089	476	3,712	224,085	-	317,774	27,437	17,021	678	280	2,733	578	3,395	2,881
Trowbridge	2,236	2,135	481	2,782	141,365	317,801	-	162,427	76,902	3,400	937	3,806	852	4,666	4,015
Melksham	1,059	2,244	240	605	16,244	28,335	168,797	-	151,171	3,907	1,005	1,322	396	1,579	1,256
Chippenham	6,751	14,484	120	660	11,852	16,885	75,276	154,321	-	39,870	7,249	1,880	378	2,600	1,907
Malmesbury	11,000	100,698	56	114	612	805	2,860	3,935	42,408	-	53,184	82	23	201	176
Kemble	6,399	79,335	4	6	67	37	124	143	1,041	6,935	-	29	11	79	69
Weymouth	1,338	368	16,004	7,299	3,153	2,651	3,960	1,057	2,019	205	108	-	23,069	93,779	168,794
Swanage	214	93	4,368	1,988	807	575	1,069	346	417	11	100	25,346	-	73,667	178,979
Bournemouth	2,449	1,129	49,288	23,901	6,141	3,293	4,383	1,470	2,040	210	648	88,554	66,772		8,057,728
Poole	2,313	1,005	140,470	31,429	7,719	2,776	3,594	1,329	1,884	138	445	172,871	205,091	7,938,793	-
											-	-	TOTAL – Wey	mouth Terminus	4,041,262
													TOTAL - Sv	vanage Terminus	3,983,988
												TOTAL	- Bournemouth	/Poole Terminus	20,545,541
									TOTAL – Bou	urnemouth/Poo	le Terminus (e>	cluding interna	al trips within B	ournemouth and	4,549,020

Central Corridor

The core section of the corridor route without variation is indicated by the green coloured outline.

The Bournemouth and Poole internal demand is indicated by the red-coloured dotted outline.

Eastern Corridor

O/D	Cheltenham	Cirencester	Swindon	Marlborough	Tidworth	Amesbury	Salisbury	Ringwood	Christchurch	Bournemouth	Poole
Cheltenham	-	186,545	88,413	2,745	675	653	1,031	226	311	2,022	1,850
Cirencester	192,031	-	423,619	4,985	919	765	1,195	192	102	1,063	842
Swindon	90,005	426,042	-	173,074	14,903	28,032	17,274	1,077	1,265	16,105	7,821
Marlborough	2,760	5,101	172,734	-	6,613	4,181	5,590	249	291	1,617	1,066
Tidworth	609	1,109	15,394	6,268	-	121,610	72,985	451	380	4,948	3,002
Amesbury	619	904	27,105	4,150	127,161	-	460,220	3,490	1,966	14,252	7,958
Salisbury	1,128	1,001	17,731	5,686	75,133	475,903	-	45,341	14,385	108,368	44,277
Ringwood	298	133	1,232	201	434	4,107	45,970	-	123,168	490,114	170,804
Christchurch	295	199	1,303	282	401	2,084	14,947	124,168	-	2,432,835	359,803
Bournemouth	1,917	995	15,524	1,536	5,220	15,518	110,171	492,057	2,507,949	in the second second	8,057,728
Poole	1,776	826	7,479	973	3,118	8,352	43,218	175,067	358,034	7,938,793	-
										TOTAL:	27,081,215
							TOTA	L excluding Bournem	outh, Christchurch ar	nd Poole internal trips:	5,426,073

The Bournemouth and Poole internal demand is indicated by the red-coloured dotted outline.

Bristol-Bournemouth Corridor

							Blandford		
OD	Bristol	Bath	Frome	Castle Cary	Yeovil	Dorchester	Forum	Poole	Bournemouth
Bristol		984,094	57,569	16,984	43,372	5,066	1,503	14,751	16,675
Bath	914,014		196,858	9,254	15,065	2,543	1,122	12,472	11,963
Frome	53,988	206,412	-	13,938	17,920	1,477	679	3,420	3,615
Castle Cary	5,556	3,691	5,438	-	61,080	1,003	304	855	718
Yeovil	36,960	15,307	17,938	165,184	-	77,862	6,804	26,263	21,569
Dorchester	5,027	2,544	1,318	2,697	79,954	-	28,747	124,814	61,344
Blandford Forum	1,259	1,144	662	651	6,704	29,358	-	142,777	54,013
Poole	14,380	11,653	3,044	2,171	25,662	122,156	140,470		7,938,793
Bournemouth	17,552	12,023	3,460	1,512	20,167	59,861	49,288	8,057,728	
								TOTAL:	20,074,220
						TOTA	L excluding Bristo	l-Bath internal trips	18,176,112
						TOTAL excluding	Bournemouth and	Poole internal trips	4,077,699
					TOTAL exclud	ding Bristol-Bath a	nd Bournemouth-	Poole internal trips	2,179,591

The Bournemouth and Poole, and Bristol and Bath internal demand is indicated by the red-coloured dotted outline.

Appendix C – Eastern Corridor Time Period Demand (Weekday AM peak (3 hours))

O/D - AM Peak (annual)	Cheltenham	Cirencester	Swindon	Marlborough	Tidworth	Amesbury	Salisbury	Ringwood	Christchurch	Bournemouth	Poole
Cheltenham	-	32,358	6,417	244	13	28	46	10	26	114	28
Cirencester	27,422	-	37,740	770	51	35	49	11	-	27	22
Swindon	14,137	101,933	-	31,231	2,213	1,331	2,276	160	86	1,171	399
Marlborough	214	436	22,271	-	731	536	615	13	16	96	-
Tidworth	18	187	910	702	-	11,151	11,464	15	15	314	67
Amesbury	16	-	1,822	732	18,174	-	88,672	151	263	1,033	896
Salisbury	77	10	1,178	623	10,571	39,586	-	4,687	885	8,946	3,567
Ringwood	54	-	77	-	-	688	8,013	-	14,757	66,866	24,612
Christchurch	27	30	99	46	10	147	2,222	23,766		307,820	64,314
Bournemouth	129	126	622	139	208	1,274	15,528	79,069	337,049		1,172,675
Poole	49	46	376	45	150	1,155	5,856	35,030	53,357	1,019,622	

O/D - AM Peak Per Weekday	Cheltenham	Cirencester	Swindon	Marlborough	Tidworth	Amesbury	Salisbury	Ringwood	Christchurch	Bournemouth	Poole
Cheltenham	-	128	25	1	0	0	0	0	0	0	0
Cirencester	109	-	150	3	0	0	0	0	-	0	0
Swindon	56	404	-	124	9	5	9	1	0	5	2
Marlborough	1	2	88	-	3	2	2	0	0	0	-
Tidworth	0	1	4	3	-	44	45	0	0	1	0
Amesbury	0	-	7	3	72	-	352	1	1	4	4
Salisbury	0	0	5	2	42	157	-	19	4	36	14
Ringwood	0	-	0	-	-	3	32	-	59	265	98
Christchurch	0	0	0	0	0	1	9	94		1,222	255
Bournemouth	1	1	2	1	1	5	62	314	1,337	-	4,653
Poole	0	0	1	0	1	5	23	139	212	4,046	

O/D - AM Peak Per Weekday - modal											
change of 0.5%	Cheltenham	Cirencester	Swindon	Marlborough	Tidworth	Amesbury	Salisbury	Ringwood	Christchurch	Bournemouth	Poole
Cheltenham	0	1	0	0	0	0	0	0	0	0	0
Cirencester	1	0	1	0	0	0	0	0	0	0	0
Swindon	0	2	0	1	0	0	0	0	0	0	0
Marlborough	0	0	0	0	0	0	0	0	0	0	0
Tidworth	0	0	0	0	0	0	0	0	0	0	0
Amesbury	0	0	0	0	0	0	2	0	0	0	0
Salisbury	0	0	0	0	0	1	0	0	0	0	0
Ringwood	0	0	0	0	0	0	0	0	0	1	0
Christchurch	0	0	0	0	0	0	0	0	0	6	1
Bournemouth	0	0	0	0	0	0	0	2	7	0	23
Poole	0	0	0	0	0	0	0	1	1	20	0

Project number: 60684169

O/D - AM Peak Per Weekday - modal											
change of 1%	Cheltenham	Cirencester	Swindon	Marlborough	Tidworth	Amesbury	Salisbury	Ringwood	Christchurch	Bournemouth	Poole
Cheltenham	0	1	0	0	0	0	0	0	0	0	0
Cirencester	1	0	1	0	0	0	0	0	0	0	0
Swindon	1	4	0	1	0	0	0	0	0	0	0
Marlborough	0	0	1	0	0	0	0	0	0	0	0
Tidworth	0	0	0	0	0	0	0	0	0	0	0
Amesbury	0	0	0	0	1	0	4	0	0	0	0
Salisbury	0	0	0	0	0	2	0	0	0	0	0
Ringwood	0	0	0	0	0	0	0	0	11	3	11
Christchurch	0	0	0	0	0	0	0	1	0	12	3
Bournemouth	0	0	0	0	0	0	1	3	13	0	47
Poole	0	0	0	0	0	0	0	1	2	40	0

O/D - AM Peak Per Weekday - modal change of 2%	Cheltenham	Cirencester	Swindon	Marlborough	Tidworth	Amesbury	Salisbury	Ringwood	Christchurch	Bournemouth	Poole
Cheltenham	0	3	1	0	0	0	0	0	0	0	0
Cirencester	2	0	3	0	0	0	0	0	0	0	0
Swindon	1	8	0	2	0	0	0	0	0	0	0
Marlborough	0	0	2	0	0	0	0	0	0	0	0
Tidworth	0	0	0	0	0	1	1	0	0	0	0
Amesbury	0	0	0	0	1	0	7	0	0	0	0
Salisbury	0	0	0	0	1	3	0	0	0	1	0
Ringwood	0	0	0	0	0	0	1	0	11	5	2
Christchurch	0	0	0	0	0	0	0	2	0	24	5
Bournemouth	0	0	0	0	0	0	1	6	27	0	93
Poole	0	0	0	0	0	0	0	3	4	81	0

O/D - AM Peak Per Weekday - modal											
change of 5%	Cheltenham	Cirencester	Swindon	Marlborough	Tidworth	Amesbury	Salisbury	Ringwood	Christchurch	Bournemouth	Poole
Cheltenham	0	6	1	0	0	0	0	0	0	0	0
Cirencester	5	0	7	0	0	0	0	0	0	0	0
Swindon	3	20	0	6	0	0	0	0	0	0	0
Marlborough	0	0	4	0	0	0	0	0	0	0	0
Tidworth	0	0	0	0	0	2	2	0	0	0	0
Amesbury	0	0	0	0	4	0	18	0	0	0	0
Salisbury	0	0	0	0	2	8	0	1	0	2	1
Ringwood	0	0	0	0	0	0	2	0	3	13	5
Christchurch	0	0	0	0	0	0	0	5	0	61	13
Bournemouth	0	0	0	0	0	0	3	16	67	0	233
Poole	0	0	0	0	0	0	1	7	11	202	0

Appendix D - Eastern Corridor Time Period Demand (Weekday PM peak (3 hours))

O/D - PM Peak (annual)	Cheltenham	Cirencester	Swindon	Marlborough	Tidworth	Amesbury	Salisbury	Ringwood	Christchurch	Bournemouth	Poole
Cheltenham	-	26,533	12,307	231	50	16	52	-	-	98	93
Cirencester	34,194	-	102,427	514	118	148	10	-	-	10	10
Swindon	7,805	46,611	-	23,218	1,273	1,775	870	72	30	352	246
Marlborough	93	651	26,439	-	680	530	403	28	29	61	43
Tidworth	26	73	2,829	889	-	24,606	11,608	-	32	462	409
Amesbury	-	86	1,375	619	19,349	-	53,671	276	104	1,971	763
Salisbury	34	63	1,276	438	13,371	87,308	-	7,132	1,421	14,493	4,300
Ringwood	-	-	23	12	38	299	5,087	-	23,442	89,764	30,604
Christchurch	11	20	10	15	16	123	937	14,624		372,564	49,444
Bournemouth	-	62	924	38	394	1,607	12,864	71,752	359,175		1,150,465
Poole	107	25	378	21	348	539	2,819	24,498	56,254	1,313,000	in a second

O/D - PM Peak Per Weekday	Cheltenham	Cirencester	Swindon	Marlborough	Tidworth	Amesbury	Salisbury	Ringwood	Christchurch	Bournemouth	Poole
Cheltenham	-	105	49	1	0	0	0	-	-	0	0
Cirencester	136	-	406	2	0	1	0	-	-	0	0
Swindon	31	185	-	92	5	7	3	0	0	1	1
Marlborough	0	3	105	-	3	2	2	0	0	0	0
Tidworth	0	0	11	4	-	98	46	-	0	2	2
Amesbury	-	0	5	2	77	-	213	1	0	8	3
Salisbury	0	0	5	2	53	346	-	28	6	58	17
Ringwood	-	-	0	0	0	1	20	-	93	356	121
Christchurch	0	0	0	0	0	0	4	58		1,478	196
Bournemouth	-	0	4	0	2	6	51	285	1,425		4,565
Poole	0	0	2	0	1	2	11	97	223	5,210	a na se

O/D - PM Peak Per											
change of 0.5%	Cheltenham	Cirencester	Swindon	Marlborough	Tidworth	Amesbury	Salisbury	Ringwood	Christchurch	Bournemouth	Poole
Cheltenham	-	1	0	0	0	0	0	-	-	0	0
Cirencester	1	-	2	0	0	0	0	-	-	0	0
Swindon	0	1	-	0	0	0	0	0	0	0	0
Marlborough	0	0	1	-	0	0	0	0	0	0	0
Tidworth	0	0	0	0	-	0	0	-	0	0	0
Amesbury	-	0	0	0	0	-	1	0	0	0	0
Salisbury	0	0	0	0	0	2	-	0	0	0	0
Ringwood	-	-	0	0	0	0	0	-	0	2	11
Christchurch	0	0	0	0	0	0	0	0		7	1
Bournemouth	-	0	0	0	0	0	0	1	7		23
Poole	0	0	0	0	0	0	0	0	1	26	- Maria Pa lakaka

Project number: 60684169

O/D - PM Peak Per											
Weekday - modal											
change of 1%	Cheltenham	Cirencester	Swindon	Marlborough	Tidworth	Amesbury	Salisbury	Ringwood	Christchurch	Bournemouth	Poole
Cheltenham	-	1	0	0	0	0	0	-	-	0	0
Cirencester	1	-	4	0	0	0	0	-	-	0	0
Swindon	0	2	-	1	0	0	0	0	0	0	0
Marlborough	0	0	1	-	0	0	0	0	0	0	0
Tidworth	0	0	0	0	-	1	0	-	0	0	0
Amesbury	-	0	0	0	1	-	2	0	0	0	0
Salisbury	0	0	0	0	1	3	-	0	0	1	0
Ringwood	-	-	0	0	0	0	0	-	11	4	11
Christchurch	0	0	0	0	0	0	0	1		15	2
Bournemouth	-	0	0	0	0	0	1	3	14		46
Poole	0	0	0	0	0	0	0	1	2	52	

O/D - PM Peak Per Weekday - modal											
change of 2%	Cheltenham	Cirencester	Swindon	Marlborough	Tidworth	Amesbury	Salisbury	Ringwood	Christchurch	Bournemouth	Poole
Cheltenham	-	2	1	0	0	0	0	-	-	0	0
Cirencester	3	-	8	0	0	0	0	-	-	0	0
Swindon	1	4	-	2	0	0	0	0	0	0	0
Marlborough	0	0	2	-	0	0	0	0	0	0	0
Tidworth	0	0	0	0	-	2	1	-	0	0	0
Amesbury	-	0	0	0	2	-	4	0	0	0	0
Salisbury	0	0	0	0	1	7	-	1	0	1	0
Ringwood	-	-	0	0	0	0	0	-	2	7	2
Christchurch	0	0	0	0	0	0	0	1		30	4
Bournemouth	-	0	0	0	0	0	1	6	29		91
Poole	0	0	0	0	0	0	0	2	4	104	deletet-tetetete

O/D - PM Peak Per Weekday - modal											
change of 5%	Cheltenham	Cirencester	Swindon	Marlborough	Tidworth	Amesbury	Salisbury	Ringwood	Christchurch	Bournemouth	Poole
Cheltenham	-	5	2	0	0	0	0	-	-	0	0
Cirencester	7	-	20	0	0	0	0	-	-	0	0
Swindon	2	9	-	5	0	0	0	0	0	0	0
Marlborough	0	0	5	-	0	0	0	0	0	0	0
Tidworth	0	0	1	0	-	5	2	-	0	0	0
Amesbury	-	0	0	0	4	-	11	0	0	0	0
Salisbury	0	0	0	0	3	17	-	1	0	3	1
Ringwood	-	-	0	0	0	0	1	-	5	18	6
Christchurch	0	0	0	0	0	0	0	3		74	10
Bournemouth	_	0	0	0	0	0	3	14	71		228
Poole	0	0	0	0	0	0	1	5	11	261	

Appendix E - Eastern Corridor Time Period Demand (Weekday Off peak (18 hours))

O/D – Off Peak (annual)	Cheltenham	Cirencester	Swindon	Marlborough	Tidworth	Amesbury	Salisbury	Ringwood	Christchurch	Bournemouth	Poole
Cheltenham	-	75,044	28,349	635	65	85	172	78	34	290	304
Cirencester	75,297	-	161,255	1,952	333	147	375	35	14	231	83
Swindon	26,313	156,046	-	64,672	6,147	15,157	4,486	242	220	3,262	1,657
Marlborough	931	2,239	69,905	-	3,038	1,682	2,328	112	88	380	247
Tidworth	123	473	6,026	2,561	-	49,240	26,767	123	83	1,353	1,045
Amesbury	102	382	14,309	1,403	50,646	-	171,801	1,807	608	4,837	2,710
Salisbury	149	133	5,240	2,513	27,365	195,653	-	18,917	4,801	40,414	15,737
Ringwood	25	14	268	44	69	1,817	17,967	-	49,402	181,866	67,313
Christchurch	23	-	212	65	91	809	4,952	50,128		1,013,789	146,293
Bournemouth	284	90	3,009	270	1,568	5,096	35,842	187,367	1,049,416		3,345,058
Poole	260	42	1,396	224	848	3,046	14,439	66,220	150,188	3,261,289	i a la factoria de la

O/D - Off Peak Per											
Weekday	Cheltenham	Cirencester	Swindon	Marlborough	Tidworth	Amesbury	Salisbury	Ringwood	Christchurch	Bournemouth	Poole
Cheltenham	-	298	112	3	0	0	1	0	0	1	1
Cirencester	299	-	640	8	1	1	1	0	0	1	0
Swindon	104	619	-	257	24	60	18	1	1	13	7
Marlborough	4	9	277	-	12	7	9	0	0	2	1
Tidworth	0	2	24	10	-	195	106	0	0	5	4
Amesbury	0	2	57	6	201	-	682	7	2	19	11
Salisbury	1	1	21	10	109	776	-	75	19	160	62
Ringwood	0	0	1	0	0	7	71	-	196	722	267
Christchurch	0	-	1	0	0	3	20	199	- Internet	4,023	581
Bournemouth	1	0	12	1	6	20	142	744	4,164	alalasi dalalasi	13,274
Poole	1	0	6	1	3	12	57	263	596	12,942	ininini-kininin

O/D - Off Peak Per Weekday - modal											
change of 0.5%	Cheltenham	Cirencester	Swindon	Marlborough	Tidworth	Amesbury	Salisbury	Ringwood	Christchurch	Bournemouth	Poole
Cheltenham	0	1	1	0	0	0	0	0	0	0	0
Cirencester	1	0	3	0	0	0	0	0	0	0	0
Swindon	1	3	0	1	0	0	0	0	0	0	0
Marlborough	0	0	1	0	0	0	0	0	0	0	0
Tidworth	0	0	0	0	0	1	1	0	0	0	0
Amesbury	0	0	0	0	1	0	3	0	0	0	0
Salisbury	0	0	0	0	1	4	0	0	0	1	0
Ringwood	0	0	0	0	0	0	0	0	11	4	1
Christchurch	0	0	0	0	0	0	0	1	0	20	3
Bournemouth	0	0	0	0	0	0	1	4	21	0	66
Poole	0	0	0	0	0	0	0	1	3	65	0

Project number: 60684169

O/D - Off Peak Per											
change of 1%	Cheltenham	Cirencester	Swindon	Marlborough	Tidworth	Amesbury	Salisbury	Ringwood	Christchurch	Bournemouth	Poole
Cheltenham	0	3	1	0	0	0	0	0	0	0	0
Cirencester	3	0	6	0	0	0	0	0	0	0	0
Swindon	1	6	0	3	0	1	0	0	0	0	0
Marlborough	0	0	3	0	0	0	0	0	0	0	0
Tidworth	0	0	0	0	0	2	1	0	0	0	0
Amesbury	0	0	1	0	2	0	7	0	0	0	0
Salisbury	0	0	0	0	1	8	0	1	0	2	1
Ringwood	0	0	0	0	0	0	1	0	2	7	33
Christchurch	0	0	0	0	0	0	0	2	0	40	6
Bournemouth	0	0	0	0	0	0	1	7	42	0	133
Poole	0	0	0	0	0	0	1	3	6	129	0

O/D - Off Peak Per Weekday - modal											
change of 2%	Cheltenham	Cirencester	Swindon	Marlborough	Tidworth	Amesbury	Salisbury	Ringwood	Christchurch	Bournemouth	Poole
Cheltenham	0	6	2	0	0	0	0	0	0	0	0
Cirencester	6	0	13	0	0	0	0	0	0	0	0
Swindon	2	12	0	5	0	1	0	0	0	0	0
Marlborough	0	0	6	0	0	0	0	0	0	0	0
Tidworth	0	0	0	0	0	4	2	0	0	0	0
Amesbury	0	0	1	0	4	0	14	0	0	0	0
Salisbury	0	0	0	0	2	16	0	2	0	3	1
Ringwood	0	0	0	0	0	0	1	0	44	14	5
Christchurch	0	0	0	0	0	0	0	4	0	80	12
Bournemouth	0	0	0	0	0	0	3	15	83	0	265
Poole	0	0	0	0	0	0	1	5	12	259	0

O/D - Off Peak Per Weekday - modal											
change of 5%	Cheltenham	Cirencester	Swindon	Marlborough	Tidworth	Amesbury	Salisbury	Ringwood	Christchurch	Bournemouth	Poole
Cheltenham	0	15	6	0	0	0	0	0	0	0	0
Cirencester	15	0	32	0	0	0	0	0	0	0	0
Swindon	5	31	0	13	1	3	1	0	0	1	0
Marlborough	0	0	14	0	1	0	0	0	0	0	0
Tidworth	0	0	1	1	0	10	5	0	0	0	0
Amesbury	0	0	3	0	10	0	34	0	0	1	1
Salisbury	0	0	1	0	5	39	0	4	1	8	3
Ringwood	0	0	0	0	0	0	4	0	10	36	13
Christchurch	0	0	0	0	0	0	1	10	0	201	29
Bournemouth	0	0	1	0	0	1	7	37	208	0	664
Poole	0	0	0	0	0	1	3	13	30	647	0

Appendix F – Eastern Corridor Time Period Demand (Full Weekday)

O/D – Full Day (annual)	Cheltenham	Cirencester	Swindon	Marlborough	Tidworth	Amesbury	Salisbury	Ringwood	Christchurch	Bournemouth	Poole
Cheltenham	-	133,935	47,073	1,110	128	129	270	88	60	502	425
Cirencester	136,913	-	301,422	3,236	502	330	434	46	14	268	115
Swindon	48,255	304,590	-	119,121	9,633	18,263	7,632	474	336	4,785	2,302
Marlborough	1,238	3,326	118,615	-	4,449	2,748	3,346	153	133	537	290
Tidworth	167	733	9,765	4,152	-	84,997	49,839	138	130	2,129	1,521
Amesbury	118	468	17,506	2,754	88,169	-	314,144	2,234	975	7,841	4,369
Salisbury	260	206	7,694	3,574	51,307	322,547	-	30,736	7,107	63,853	23,604
Ringwood	79	14	368	56	107	2,804	31,067	-	87,601	338,496	122,529
Christchurch	61	50	321	126	117	1,079	8,111	88,518		1,694,173	260,051
Bournemouth	413	278	4,555	447	2,170	7,977	64,234	338,188	1,745,640		5,668,198
Poole	416	113	2,150	290	1,346	4,740	23,114	125,748	259,799	5,593,911	

O/D – Full Day Per											
Weekday	Cheltenham	Cirencester	Swindon	Marlborough	Tidworth	Amesbury	Salisbury	Ringwood	Christchurch	Bournemouth	Poole
Cheltenham	-	531	187	4	1	1	1	0	0	2	2
Cirencester	543	-	1,196	13	2	1	2	0	0	1	0
Swindon	191	1,209	-	473	38	72	30	2	1	19	9
Marlborough	5	13	471	-	18	11	13	1	1	2	1
Tidworth	1	3	39	16	-	337	198	1	1	8	6
Amesbury	0	2	69	11	350	-	1,247	9	4	31	17
Salisbury	1	1	31	14	204	1,280	-	122	28	253	94
Ringwood	0	0	1	0	0	11	123	-	348	1,343	486
Christchurch	0	0	1	1	0	4	32	351		6,723	1,032
Bournemouth	2	1	18	2	9	32	255	1,342	6,927	- Mainin - Mainin	22,493
Poole	2	0	9	1	5	19	92	499	1,031	22,198	teleje je je je je je je

O/D – Full Day Per Weekday – modal											
change of 0.5%	Cheltenham	Cirencester	Swindon	Marlborough	Tidworth	Amesbury	Salisbury	Ringwood	Christchurch	Bournemouth	Poole
Cheltenham	-	3	1	0	0	0	0	0	0	0	0
Cirencester	3	-	6	0	0	0	0	0	0	0	0
Swindon	1	6	-	2	0	0	0	0	0	0	0
Marlborough	0	0	2	-	0	0	0	0	0	0	0
Tidworth	0	0	0	0	-	2	1	0	0	0	0
Amesbury	0	0	0	0	2	-	6	0	0	0	0
Salisbury	0	0	0	0	1	6	-	1	0	1	0
Ringwood	0	0	0	0	0	0	1	-	2	7	2
Christchurch	0	0	0	0	0	0	0	2	ininini-ininini	34	5
Bournemouth	0	0	0	0	0	0	1	7	35	a a su a	112
Poole	0	0	0	0	0	0	0	2	5	111	in an

Project number: 60684169

O/D – Full Day Per Weekday - modal											
change of 1%	Cheltenham	Cirencester	Swindon	Marlborough	Tidworth	Amesbury	Salisbury	Ringwood	Christchurch	Bournemouth	Poole
Cheltenham	0	5	2	0	0	0	0	0	0	0	0
Cirencester	5	0	12	0	0	0	0	0	0	0	0
Swindon	2	12	0	5	0	1	0	0	0	0	0
Marlborough	0	0	5	0	0	0	0	0	0	0	0
Tidworth	0	0	0	0	0	3	2	0	0	0	0
Amesbury	0	0	1	0	3	0	12	0	0	0	0
Salisbury	0	0	0	0	2	13	0	1	0	3	1
Ringwood	0	0	0	0	0	0	1	0	3	13	5
Christchurch	0	0	0	0	0	0	0	4	0	67	10
Bournemouth	0	0	0	0	0	0	3	13	69	0	225
Poole	0	0	0	0	0	0	1	5	10	222	0

O/D – Full Day Per Weekday - modal											
change of 2%	Cheltenham	Cirencester	Swindon	Marlborough	Tidworth	Amesbury	Salisbury	Ringwood	Christchurch	Bournemouth	Poole
Cheltenham	-	11	4	0	0	0	0	0	0	0	0
Cirencester	11	-	24	0	0	0	0	0	0	0	0
Swindon	4	24	-	9	1	1	1	0	0	0	0
Marlborough	0	0	9	-	0	0	0	0	0	0	0
Tidworth	0	0	1	0	-	7	4	0	0	0	0
Amesbury	0	0	1	0	7	-	25	0	0	1	0
Salisbury	0	0	1	0	4	26	-	2	1	5	2
Ringwood	0	0	0	0	0	0	2	-	7	27	10
Christchurch	0	0	0	0	0	0	1	7		134	21
Bournemouth	0	0	0	0	0	1	5	27	139	- Mainter - States and	450
Poole	0	0	0	0	0	0	2	10	21	444	

O/D – Full Day Per Weekday - modal											
change of 5%	Cheltenham	Cirencester	Swindon	Marlborough	Tidworth	Amesbury	Salisbury	Ringwood	Christchurch	Bournemouth	Poole
Cheltenham	0	27	9	0	0	0	0	0	0	0	0
Cirencester	27	0	60	1	0	0	0	0	0	0	0
Swindon	10	60	0	24	2	4	2	0	0	1	0
Marlborough	0	1	24	0	1	1	1	0	0	0	0
Tidworth	0	0	2	1	0	17	10	0	0	0	0
Amesbury	0	0	3	1	17	0	62	0	0	2	1
Salisbury	0	0	2	1	10	64	0	6	1	13	5
Ringwood	0	0	0	0	0	1	6	0	17	67	24
Christchurch	0	0	0	0	0	0	2	18	0	336	52
Bournemouth	0	0	1	0	0	2	13	67	346	0	1125
Poole	0	0	0	0	0	1	5	25	52	1110	0
Appendix G - Eastern Corridor Time Period Demand (Weekend - 2 days)

O/D – Weekend (annual)	Cheltenham	Cirencester	Swindon	Marlborough	Tidworth	Amesbury	Salisbury	Ringwood	Christchurch	Bournemouth	Poole
Cheltenham	-	49,503	17,233	532	85	108	164	-	53	196	233
Cirencester	52,197	-	118,458	1,505	221	172	152	-	59	170	166
Swindon	17,739	118,128	-	53,067	3,103	7,680	2,572	168	250	3,927	1,648
Marlborough	433	1,511	53,078	-	2,149	1,403	1,473	31	22	331	195
Tidworth	44	181	3,462	2,074	-	36,609	23,015	97	97	1,321	379
Amesbury	83	153	7,637	1,358	38,990	-	146,065	1,006	524	4,209	1,664
Salisbury	125	63	2,832	1,381	23,556	153,328	-	13,718	4,506	29,889	10,550
Ringwood	12	-	228	46	68	1,151	13,988	-	35,448	150,342	46,814
Christchurch	13	29	344	40	86	572	4,125	35,482		736,869	96,226
Bournemouth	289	105	3,540	243	1,494	5,324	31,416	152,584	760,452		2,381,319
Poole	156	202	1,313	146	625	1,861	9,634	47,790	94,436	2,336,663	a de la constante de la constan

O/D – Full Weekend	Cheltenham	Cirencester	Swindon	Marlborough	Tidworth	Amesbury	Salisbury	Ringwood	Christchurch	Bournemouth	Poole
Cheltenham	-	952	331	10	2	2	3	-	1	4	4
Cirencester	1,004	-	2,278	29	4	3	3	-	1	3	3
Swindon	341	2,272	-	1,021	60	148	49	3	5	76	32
Marlborough	8	29	1,021	-	41	27	28	1	0	6	4
Tidworth	1	3	67	40	-	704	443	2	2	25	7
Amesbury	2	3	147	26	750	-	2,809	19	10	81	32
Salisbury	2	1	54	27	453	2,949	-	264	87	575	203
Ringwood	0	-	4	1	1	22	269	-	682	2,891	900
Christchurch	0	1	7	1	2	11	79	682		14,171	1,851
Bournemouth	6	2	68	5	29	102	604	2,934	14,624	and a second second	45,795
Poole	3	4	25	3	12	36	185	919	1,816	44,936	

O/D – Full Weekend - modal change of 0.5%	Cheltenham	Cirencester	Swindon	Marlborough	Tidworth	Amesbury	Salisbury	Ringwood	Christchurch	Bournemouth	Poole
Cheltenham	-	5	2	0	0	0	0	-	0	0	0
Cirencester	5	-	11	0	0	0	0	-	0	0	0
Swindon	2	11	-	5	0	1	0	0	0	0	0
Marlborough	0	0	5	-	0	0	0	0	0	0	0
Tidworth	0	0	0	0	-	4	2	0	0	0	0
Amesbury	0	0	1	0	4	-	14	0	0	0	0
Salisbury	0	0	0	0	2	15	-	1	0	3	1
Ringwood	0	-	0	0	0	0	1	-	3	14	5
Christchurch	0	0	0	0	0	0	0	3	a a a a a a a a a a a a a a a a a a a	71	9
Bournemouth	0	0	0	0	0	1	3	15	73		229
Poole	0	0	0	0	0	0	1	5	9	225	-

Project number: 60684169

O/D – Full Weekend - modal change of 1%	Cheltenham	Cirencester	Swindon	Marlborough	Tidworth	Amesbury	Salisbury	Ringwood	Christchurch	Bournemouth	Poole
Cheltenham	0	10	3	0	0	0	0	0	0	0	0
Cirencester	10	0	23	0	0	0	0	0	0	0	0
Swindon	3	23	0	10	1	1	0	0	0	1	0
Marlborough	0	0	10	0	0	0	0	0	0	0	0
Tidworth	0	0	1	0	0	7	4	0	0	0	0
Amesbury	0	0	1	0	7	0	28	0	0	1	0
Salisbury	0	0	1	0	5	29	0	3	1	6	2
Ringwood	0	0	0	0	0	0	3	0	7	29	9
Christchurch	0	0	0	0	0	0	1	7	0	142	19
Bournemouth	0	0	1	0	0	1	6	29	146	0	458
Poole	0	0	0	0	0	0	2	9	18	449	0

O/D – Full Weekend – modal change of 2%	Cheltenham	Cirencester	Swindon	Marlborough	Tidworth	Amesbury	Salisbury	Ringwood	Christchurch	Bournemouth	Poole
Cheltenham	-	19	7	0	0	0	0	-	0	0	0
Cirencester	20	-	46	1	0	0	0	-	0	0	0
Swindon	7	45	-	20	1	3	1	0	0	2	1
Marlborough	0	1	20	-	1	1	1	0	0	0	0
Tidworth	0	0	1	1	-	14	9	0	0	1	0
Amesbury	0	0	3	1	15	-	56	0	0	2	1
Salisbury	0	0	1	1	9	59	-	5	2	11	4
Ringwood	0	-	0	0	0	0	5	-	14	58	18
Christchurch	0	0	0	0	0	0	2	14		283	37
Bournemouth	0	0	1	0	1	2	12	59	292	in a second second	916
Poole	0	0	1	0	0	1	4	18	36	899	

modal change of 5%	Cheltenham	Cirencester	Swindon	Marlborough	Tidworth	Amesbury	Salisbury	Ringwood	Christchurch	Bournemouth	Poole
Cheltenham	0	48	17	1	0	0	0	0	0	0	0
Cirencester	50	0	114	1	0	0	0	0	0	0	0
Swindon	17	114	0	51	3	7	2	0	0	4	2
Marlborough	0	1	51	0	2	1	1	0	0	0	0
Tidworth	0	0	3	2	0	35	22	0	0	1	0
Amesbury	0	0	7	1	37	0	140	1	1	4	2
Salisbury	0	0	3	1	23	147	0	13	4	29	10
Ringwood	0	0	0	0	0	1	13	0	34	145	45
Christchurch	0	0	0	0	0	1	4	34	0	709	93
Bournemouth	0	0	3	0	1	5	30	147	731	0	2,290
Poole	0	0	1	0	1	2	9	46	91	2,247	0

Appendix H - Boardings and Alightings by Stop – Full Weekday (Eastern Corridor)

O/D – Full Weekday – 2% modal share	Cheltenham	Cirencester	Swindon	Marlborough	Tidworth	Amesbury	Salisbury	Ringwood	Christchurch	Bournemouth	Poole
Cheltenham	-	11	4	0	0	0	0	0	0	0	0
Cirencester	11	-	24	0	0	0	0	0	0	0	0
Swindon	4	24	-	9	1	1	1	0	0	0	0
Marlborough	0	0	9	-	0	0	0	0	0	0	0
Tidworth	0	0	1	0	-	7	4	0	0	0	0
Amesbury	0	0	1	0	7	-	25	0	0	1	0
Salisbury	0	0	1	0	4	26	-	2	1	5	2
Ringwood	0	0	0	0	0	0	2	-	7	27	10
Christchurch	0	0	0	0	0	0	1	7		134	21
Bournemouth	0	0	0	0	0	1	5	27	139		450
Poole	0	0	0	0	0	0	2	10	21	444	

Southbound Direction – occupancy levels at each stop

O/D – Full Weekday – 2% modal share	Stop 0	Stop 1	Stop 2	Stop 3	Stop 4	Stop 5	Stop 6	Stop 7	Stop 8	Stop 9	Final Destination
O/D – Full Weekday	Cheltenham	Cirencester	Swindon	Marlborough	Tidworth	Amesbury	Salisbury	Ringwood	Christchurch	Bournemouth	Poole
Boarding	15	24	13	1	11	26	10	44	155	450	-
Alighting	-	11	28	10	1	8	30	3	8	168	483
Occupancy	15	28	14	5	14	32	12	53	201	483	-
Adjusted Occupancy excluding BCP internal trips	15	28	14	5	14	32	12	53	46	33	-

Adjusted Occupancy assumes passengers cannot board then alight within the Bournemouth, Christchurch and Poole area

Northbound Direction – occupancy levels at each stop

				I	I			I		I	
O/D – Full Weekday – 2% modal share	Stop 0	Stop 1	Stop 2	Stop 3	Stop 4	Stop 5	Stop 6	Stop 7	Stop 8	Stop 9	Final Destination
O/D – Full Weekday	Poole	Bournemouth	Christchurch	Ringwood	Salisbury	Amesbury	Tidworth	Marlborough	Swindon	Cirencester	Cheltenham
Boarding	477	172	8	3	31	9	1	10	28	11	-
Alighting	-	444	159	44	10	27	11	1	13	25	15
Occupancy	477	205	54	12	33	15	5	13	29	15	-
Adjusted Occupancy											
excluding BCP internal	13	33	8	12	33	15	5	13	29	15	-
trips											

Adjusted Occupancy assumes passengers cannot board then alight within the Bournemouth, Christchurch and Poole area