

Western Gateway STB Coach Parking Surveys - April 2025

Western Gateway STB

July 2025

Quality information

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Table of Contents

1.	Introduction.....	6
2.	Location-specific analysis.....	8
3.	Operator Visits.....	59
4.	Conclusion.....	68

Figures

Figure 1-1	Map showing sites visited.....	7
Figure 2-1	Profile for Bourton-on-the-Water.....	8
Figure 2-2	Future drop-off site on Meadow Way.....	9
Figure 2-3	Minibuses in Bourton Vale Car Park.....	9
Figure 2-4	Minibus parked on double yellow lines.....	9
Figure 2-5	Coach parked in a side road in Bourton Industrial Park.....	10
Figure 2-6	Profile for Bibury.....	11
Figure 2-7	Coach parking area with very worn lines and with a minibus and cars parked within.....	12
Figure 2-8	Coach seen driving through Bibury village.....	13
Figure 2-9	Profile for Cirencester.....	14
Figure 2-10	QR Code at Cirencester National Express coach stop.....	15
Figure 2-11	Poster showing that it is not possible to buy tickets from the driver.....	15
Figure 2-12	National Express Route 440 coach seen in Cirencester.....	15
Figure 2-13	Closed toilets at Cirencester coach stop.....	16
Figure 2-14	Stop with Megabus totem, despite Megabus no longer serving the stop.....	16
Figure 2-15	Bennetts Coach seen in Cirencester operating a scheduled school service.....	16
Figure 2-16	Profile for Stroud.....	18
Figure 2-17	Worn National Express poster in Stroud.....	19
Figure 2-18	QR code poster coming off the shelter in Stroud.....	19
Figure 2-19	Scratched QR code in Stroud.....	19
Figure 2-20	National Express branded shelter in Stroud.....	19
Figure 2-21	Totem showing coach only parking area at Stratford Road in Stroud.....	20
Figure 2-22	Car parked in the designated coach spots at Stratford Road in Stroud.....	20
Figure 2-23	Profile for Bath (Odd Down Park and Ride).....	21
Figure 2-24	Surveyor making observations at Odd Down.....	22
Figure 2-25	Profile for Longleat.....	23
Figure 2-26	Coach parking area at Longleat.....	24
Figure 2-27	Uneven pedestrian area at Longleat.....	24
Figure 2-28	Profile for Stonehenge.....	25
Figure 2-29	Coaches using the coach park at Stonehenge.....	26
Figure 2-30	Surveyor making notes at Stonehenge coach park.....	26
Figure 2-31	Profile for Salisbury.....	27
Figure 2-32	Coaches parked in Salisbury at Mill Stream Approach.....	28
Figure 2-33	Drop-off area at Mill Stream Approach.....	28
Figure 2-34	Toilets and pedestrian walking route at Mill Stream Approach.....	28
Figure 2-35	National Express totem in the drop-off area at Mill Stream Approach.....	28
Figure 2-36	Coaches in the drop-off bay next to Salisbury Cathedral.....	29
Figure 2-37	Profile for Shaftesbury.....	30
Figure 2-38	Bus parked at an angle across two coach parking bays in Shaftesbury.....	31
Figure 2-39	Worn markings and toilet block in Shaftesbury.....	31
Figure 2-40	Profile for Corfe.....	32
Figure 2-41	Worn markings in the coach parking area at the Purbeck Park site.....	33
Figure 2-42	Cars parked in the coach area at the Purbeck Park site.....	33
Figure 2-43	Coach parked in the Corfe Castle National Trust parking area.....	34
Figure 2-44	Profile for Swanage.....	35
Figure 2-45	Victoria Avenue parking area in Swanage.....	36
Figure 2-46	North Beach parking area in Swanage.....	36

Figure 2-47 Coach in pick-up/drop-off area on Gilbert Road in Swanage	37
Figure 2-48 Profile for Lulworth Cove	38
Figure 2-49 Coach parking area at Lulworth Cove	39
Figure 2-50 Profile for Bovington Tank Museum/Monkey World	40
Figure 2-51 Coach parked at Bovington Tank Museum	41
Figure 2-52 Coach picking up passengers at Monkey World	41
Figure 2-53 Profile for Poole	43
Figure 2-54 Coaches parked at the Seldown Road site in Poole	44
Figure 2-55 National express branded shelter in Poole	45
Figure 2-56 Poster in a shelter in Poole with a National Express QR code and a Megabus poster, even though Megabus no longer serve the stop	45
Figure 2-57 National Express 035 service in Poole	45
Figure 2-58 Coach observed in drop-off area outside Poole Lighthouse	46
Figure 2-59 Coach observed in drop-off area on Old Orchard	46
Figure 2-60 Drop-off area on Serpentine Road in Poole	47
Figure 2-61 Sign with peeling lettering on Serpentine Road in Poole	47
Figure 2-62 Stadium Coach and Lorry park in Poole	47
Figure 2-63 Profile for Bournemouth	48
Figure 2-64 Example of a marked bay with board showing the routes served	50
Figure 2-65 Local Travel and Visitor Information centre	50
Figure 2-66 Coffee Shop and National Express tickets and information point	50
Figure 2-67 National Express Route 035 coach	50
Figure 2-68 Coaches parked at Queens Road in Bournemouth	51
Figure 2-69 Litter in the car and coach park on Queens Road	51
Figure 2-70 Coach parked at the far side of Queens Road coach park outside marked bays	51
Figure 2-71 Kings Park coach parking area	52
Figure 2-72 Drop-off area outside Bournemouth Pavilion	52
Figure 2-73 Drop-off area outside Bournemouth International Centre	52
Figure 2-74 Coach seen parked on Approach Road	53
Figure 2-75 Surveyor with Richard Barnes from BCP Council	53
Figure 2-76 Profile for Christchurch	54
Figure 2-77 Construction vehicle in the coach drop-off bay in Christchurch	55
Figure 2-78 Part of the coach parking area in Christchurch	55
Figure 2-79 Drop-off area on Wick Lane in Christchurch	56
Figure 2-80 Profile for Bournemouth Airport	57
Figure 2-81 Temporary bus stop and pedestrian route at Bournemouth Airport	58
Figure 3-1 Coach leaving the Pulhams site	60
Figure 3-2 Interior of 2023 Temsa coach	64
Figure 3-3 Interior of 2025 Irizar i6 coach	64
Figure 3-4 Surveyors with three drivers from Centurion	64
Figure 3-5 Surveyors with Steve Spiller, Director from Centurion, in front of two new vehicles	64
Figure 3-6 Interior of a coach used primarily for school services with 2x3 seating	66
Figure 3-7 Interior of a standard-specification coach used for general hire and groups	66
Figure 3-8 Selection of coaches at Excelsior's Pimperne site	67
Figure 3-9 Surveyor with Paul Knight, Coaching Unit Operations Manager from Excelsior	67

Tables

Table 1-1 Table showing sites visited	7
Table 2-1 Summary of issues for Bourton-on-the-Water	10
Table 2-2 Summary of issues for Bibury	13
Table 2-3 Summary of issues for Cirencester	17
Table 2-4 Summary of issues for Stroud	20
Table 2-5 Summary of issues for Odd Down	22
Table 2-6 Summary of issues for Longleat	24
Table 2-7 Summary of issues for Stonehenge	26
Table 2-8 Summary of issues for Salisbury	29
Table 2-9 Summary of issues for Shaftesbury	31

Table 2-10 Summary of issues for Corfe.....	34
Table 2-11 Summary of issues for Swanage.....	37
Table 2-12 Summary of issues for Lulworth Cove	39
Table 2-13 Summary of issues for Bovington Tank Museum/Monkey World.....	42
Table 2-14 Summary of issues for Poole	47
Table 2-15 Summary of issues for Bournemouth.....	53
Table 2-16 Summary of issues for Christchurch	56
Table 2-17 Summary of issues for Bournemouth Airport	58
Table 3-1 Summary of issues identified in discussion with Pulhams	61
Table 3-2 Summary of issues identified in discussion with the unnamed operator	62
Table 3-3 Summary of issues identified in discussion with Centurion	65
Table 3-4 Summary of issues identified in discussion with Excelsior	67
Table 4-1 Summary table of issues from location-specific analysis.....	69

1. Introduction

This report presents the findings of a week-long period of surveys conducted during April 2025 within the Western Gateway STB region. The scope included visiting a mixture of coach stops and stations, drop-off locations and facilities across a selection of areas within the region to review provision for coach parking and facilities. Where possible, this also included interviews with drivers and passengers. The scope of surveys and observations obtained differed at each of the facilities, depending on size and type of facility as well as the number of coaches, drivers and passengers present during the individual visits. There were also visits to the depots of four regional operators to speak to them about their views on different aspects of the industry including those applicable to the region.

This work follows on from the publication of the Western Gateway STB Coach Strategy in August 2023, which was the first strategy of its kind focusing on coaches published by a STB. The development of this strategy also included a number of site visits, as well as recommending a passenger experience survey as well as further engagement with operators as part of the 'next steps' section.

The findings of this report will be used by the STB to gain a broader understanding of the nature of coach parking facilities in the Western Gateway STB region, overall views of drivers, passengers and operators, and help to gain knowledge of some known issues in particular areas so these can potentially be alleviated. It is also aimed at showing locations with aspects that are considered to be of higher quality, so these successes can potentially be replicated in other areas.

It is important to note that this was not intended as a comprehensive study of coach parking provision in all areas within the Western Gateway STB region. Rather, it is a snapshot of selected locations in the region that was agreed by AECOM and Western Gateway STB that could be covered in a week-long survey period and would encompass different types of locations. This means that certain areas and services were not included in the scope, for example central Bristol and Bath and west Dorset. There is the potential for further visits to be undertaken in these and other areas if Western Gateway STB chooses to conduct additional surveys in the future.

Surveys were conducted over a period of 5 days from Monday 7th April to Friday 11th April 2025. This was during the school Easter holidays and was chosen as there were likely to be more coach-based tours operating during this period. It was also considered that because there would be fewer or no home-to-school services operating during this period, coach operators would have more availability for participating in the site visits and making their drivers available for interviews at their depots.

Figure 1-1 and Table 1-1 shows the locations at which visits occurred. The aim was to capture a reasonable spread of locations across the STB region. Please note that these do not show one operator who was visited but does not wish to be identified.

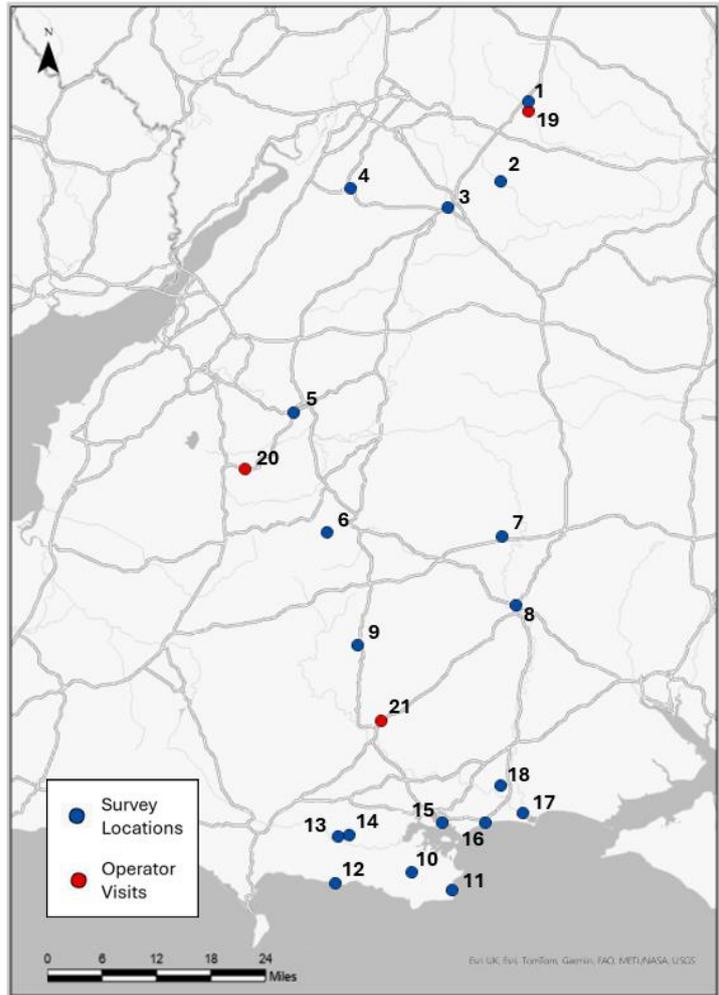


Figure 1-1 Map showing sites visited

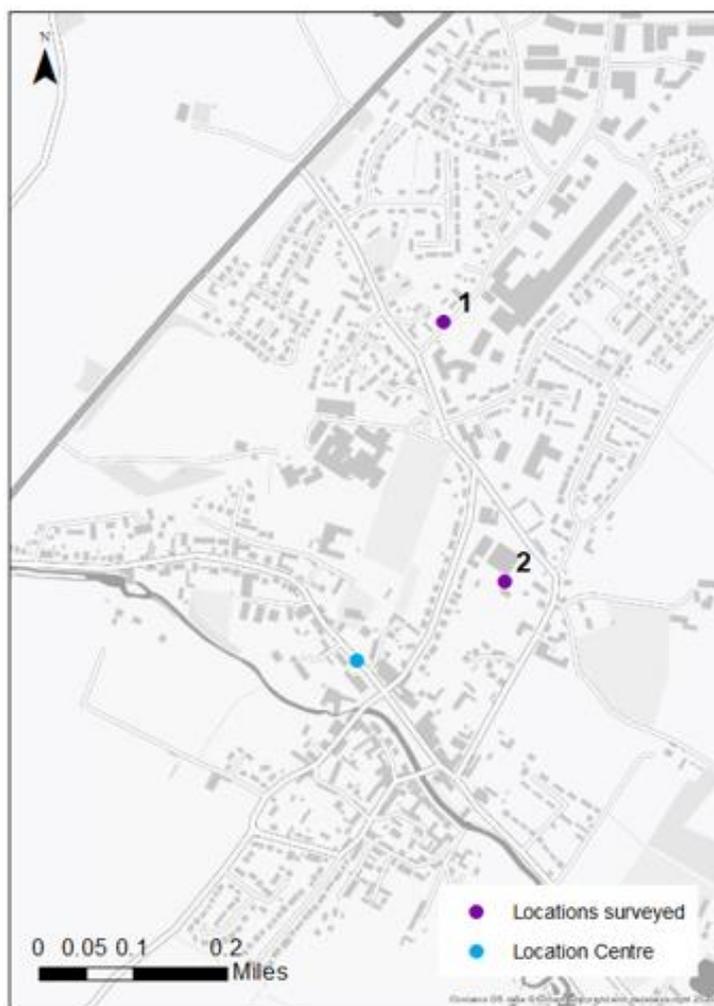
Table 1-1 Table showing sites visited

Survey Locations	Map Number	Survey Locations	Map Number	Operator Visits	Map Number
Bourton on the Water	1	Corfe	10	Pulhams Coaches, Bourton-on-the-Water	19
Bibury	2	Swanage	11	Centurion, Midsomer Norton	20
Cirencester	3	Lulworth Cove	12	Excelsior, Pimperne	21
Stroud	4	Bovington Tank Museum	13		
Bath (Odd Down Park-and-Ride site)	5	Monkey World	14		
Longleat Coach Park	6	Poole	15		
Stonehenge Coach Park	7	Bournemouth	16		
Salisbury	8	Christchurch	17		
Shaftesbury	9	Bournemouth Airport	18		

2. Location-specific analysis

This section shows location-specific analysis for the site visits conducted including a map and fact file table. Within this, the 'location centre' represents a sample location for the purposes of measuring the distances shown in the table to a location where it is assumed for the purposes of analysis that passengers will want to travel to. The crow-fly distance is the direct distance from the drop-off or parking location (site dependant) to the location centre. The walking and wheeling distance is the actual distance that would need to be travelled between the drop off or parking location and the location centre.

Bourton-on-the-Water



Location Number	Location	Owner/ operator	Number of spaces for coaches	Approximate crow-fly distance from location centre	Approximate walking and wheeling distance from location centre	Additional Facilities on site/ adjacent	Services using facility
1	Meadow Way Drop-off	Gloucestershire County Council	2 (drop-off)	550m	800m	N/A	Charter services only
2	Bourton Vale Car/ Minibus	Bourton Vale Parking Ltd	None (minibus parking only)	250m	500m	Toilet facilities	Charter Minibuses only

Figure 2-1 Profile for Bourton-on-the-Water

Bourton-on-the-Water is a village in the Cotswolds in Gloucestershire. Since a private car park stopped accepting coaches in 2023, there has been no coach parking available in the village. This has gathered significant media attention, with some coach operators saying they were no longer visiting Bourton-on-the-Water and instead visiting other areas of the Cotswolds. Meanwhile, there have been complaints of coaches parking and turning round inappropriately whilst local businesses have expressed concern that a lack of coaches may impact their customer footfall.

Since the site visit, a six-month trial has started which would involve coaches dropping off on Meadow Way before parking at the Pulhams Coaches site. During the site visit, auditors visited the site and saw where this bay would be with markers already in place ready for line painting. This will result in the displacement of on-street parking for cars.



Figure 2-2 Future drop-off site on Meadow Way

Driver Voice (2 minibus drivers)

Surveyors spoke to minibus drivers parked at Bourton Vale Car Park, who said that some operators were switching to use minibuses as there were more places to park and more manoeuvrability, not just in Bourton-on-the-Water but also in other Cotswolds villages such as Bibury and Stow-on-the-Wold. Minibuses were also spotted picking up and dropping off on double yellow lines just outside the village.



Figure 2-3 Minibuses in Bourton Vale Car Park



Figure 2-4 Minibus parked on double yellow lines

Due to a bus and coach ban (except local buses) in the village itself, no coaches were seen in the village centre. However, there was a coach spotted parking in the Bourton Industrial Park, close to the Pulhams Coaches site.

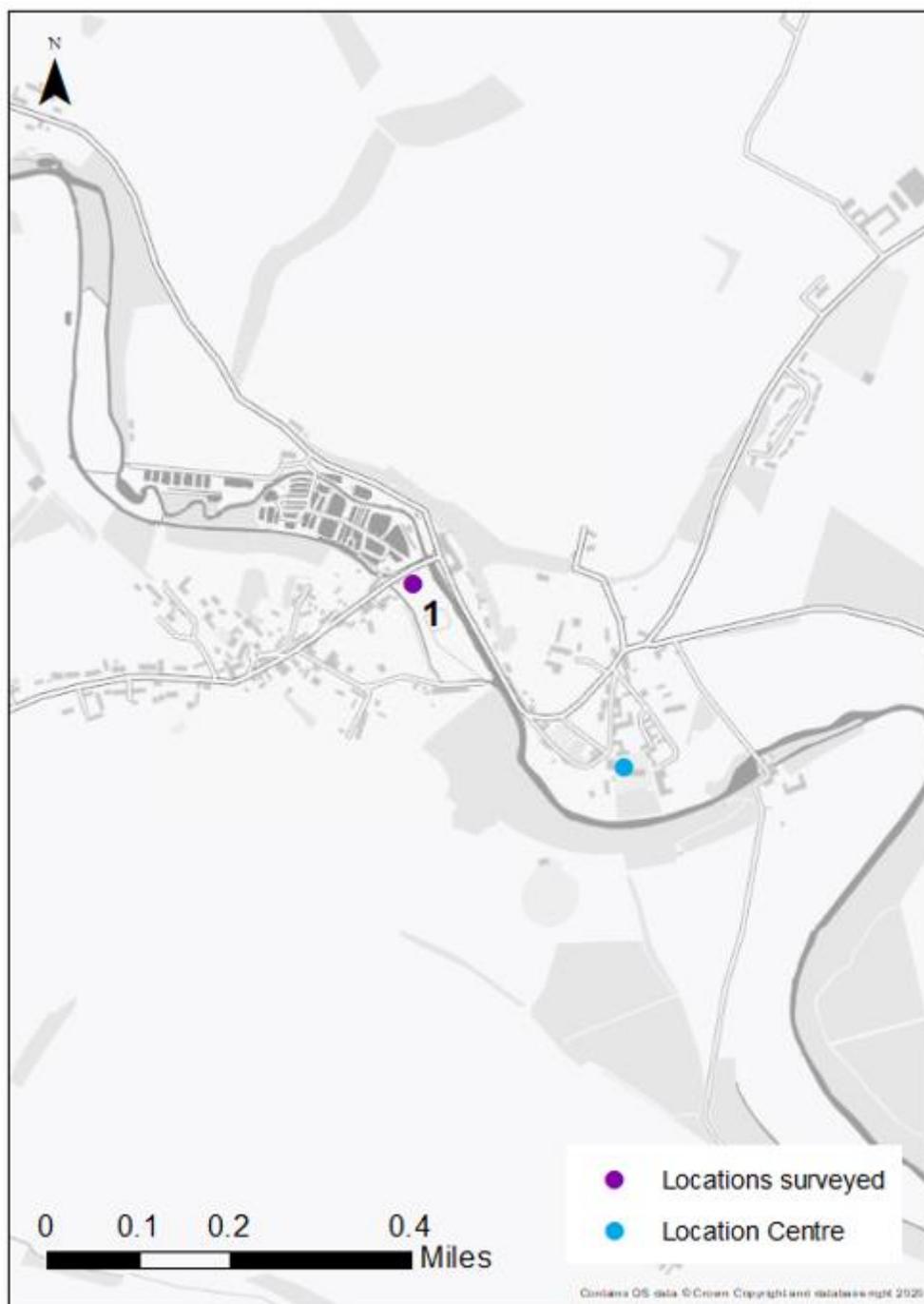


Figure 2-5 Coach parked in a side road in Bourton Industrial Park

Table 2-1 Summary of issues for Bourton-on-the-Water

Type of Issue Identified	Details
Short Term (potentially alleviated by new TRO)	Operators no longer visiting Bourton-on-the-Water due to lack of available parking
Short Term (potentially alleviated by new TRO)	Minibuses picking up/dropping off on double yellow lines
Short Term (potentially alleviated by new TRO)	Coaches seen parking in industrial parks
Long Term	Lack of coach parking available in the village and manoeuvrability in tight areas (causing some companies to switch to using minibuses)
Long Term	Displacement of on-street parking for cars once the drop-off bay is implemented on Meadow Way

Bibury



Location Number	Location	Owner/ operator	Number of spaces for coaches	Approximate crow-fly distance from location centre	Approximate walking and wheeling distance from location centre	Additional Facilities on site/ adjacent	Services using facility
1	Bibury Coach Parking Spaces	Gloucestershire County Council	2	In centre	In centre	N/A	Charter Services

Figure 2-6 Profile for Bibury

Bibury is a small village in the Cotswolds. It was originally not on the route for site visits but was visited after several people spoken to in Bourton-on-the-Water said that there had been significant issues in the village in recent years. Recently, a working group has recommended that restrictions be introduced to stop coaches waiting. There is already a weight limit on the road bridge over the River Coln. Bibury has two coach bays with a 3-hour time limit which at the time of the site visit were being used by a minibus as well as cars.

Driver Voice (1 minibus driver)

Surveyors spoke to a minibus driver on a tour from South London who said that the village was a 'nightmare' to navigate, and at the weekend with cars double parked they struggle to offload passengers. When asked about parking enforcement, the driver said that there was occasional enforcement but that this was not sufficient. The driver said that most of those on the tour were American tourists travelling from their base in London.

The coach bays are shown below, whilst there was signage present the lines marking the coach parking area were very worn.



Figure 2-7 Coach parking area with very worn lines and with a minibus and cars parked within

During the site visit, one large coach was spotted going through the village, which appeared to struggle going past cars parked on both the eastern and western sides of the bridge. There was not much space for cars to move out of the way to let the coach go through. By the time the coach had gone through the village, there were several cars behind the coach which it then stopped to let past when it got to a wider part of the road.

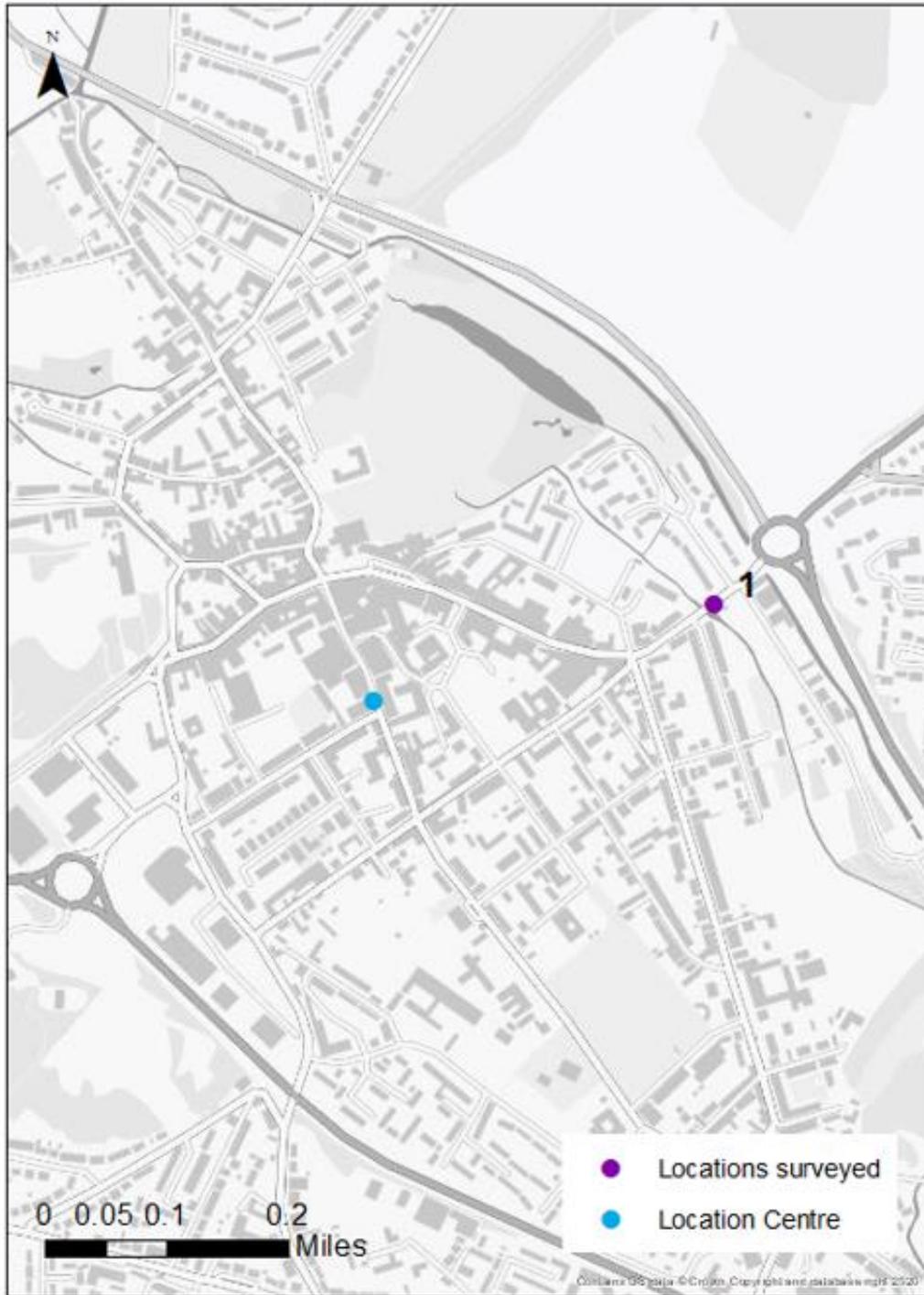


Figure 2-8 Coach seen driving through Bibury village

Table 2-2 Summary of issues for Bibury

Type of Issue Identified	Details
Short Term	Lines marking coach bays are faded
Medium Term	Other vehicles parked in coach bays with a lack of enforcement
Long Term	Issues with picking up/dropping off with cars double parked
Long Term	Issues with coaches navigating the village due to narrow streets and parked cars

Cirencester



Location Number	Location	Owner/ operator	Number of spaces for coaches	Approximate crow-fly distance from location centre	Approximate walking and wheeling distance from location centre	Additional Facilities on site/ adjacent	Services using facility
1	Cirencester Coach Stop	Gloucestershire County Council	1 on each side of road	500m	650m	Toilet	Scheduled Services

Figure 2-9 Profile for Cirencester

Cirencester was visited so auditors could meet a National Express Coach operating on Route 444 between London and Gloucester and speak to passengers present.

Passenger voice (2 passengers)

Passengers using this service noted that they use buses and coaches as they make it easy to get around, which is important in areas like Cirencester that do not have a railway station. However, passengers also said that the large step can make it difficult to get on and off coaches for those passengers with mobility issues. Passengers also said that coaches struggle to turn around in Cirencester and other Gloucestershire towns which can cause traffic disruption. They also noted that there are a lack of facilities such as toilets at or close to coach stops in Gloucestershire.

At the Cirencester stop, there was just a basic shelter with timetable boards for coaches, and only a QR code that could be scanned to take customers to the National Express website. There was also a separate notice saying that due to ‘ticketing systems upgrade works’ tickets could not be bought from the driver, which may be problematic for any passengers without a smartphone.



Figure 2-10 QR Code at Cirencester National Express coach stop



Figure 2-11 Poster showing that it is not possible to buy tickets from the driver



Figure 2-12 National Express Route 440 coach seen in Cirencester

There was only a shelter on the Gloucester-bound carriageway, with no shelter on the London-bound side. There was a unisex toilet block close by with a 40p charge however this was locked, and no obvious safe way for coach users to cross the road without taking a significant detour to a crossing at

a nearby roundabout. In addition, it was interesting to see a Megabus flag on the stop, even though Megabus services no longer stop here.



Figure 2-13 Closed toilets at Cirencester coach stop



Figure 2-14 Stop with Megabus totem, despite Megabus no longer serving the stop

In addition to visiting the National Express stop, auditors also observed a coach from Bennett's Coaches dropping off in Cirencester within the Town Centre as part of a scheduled school service.

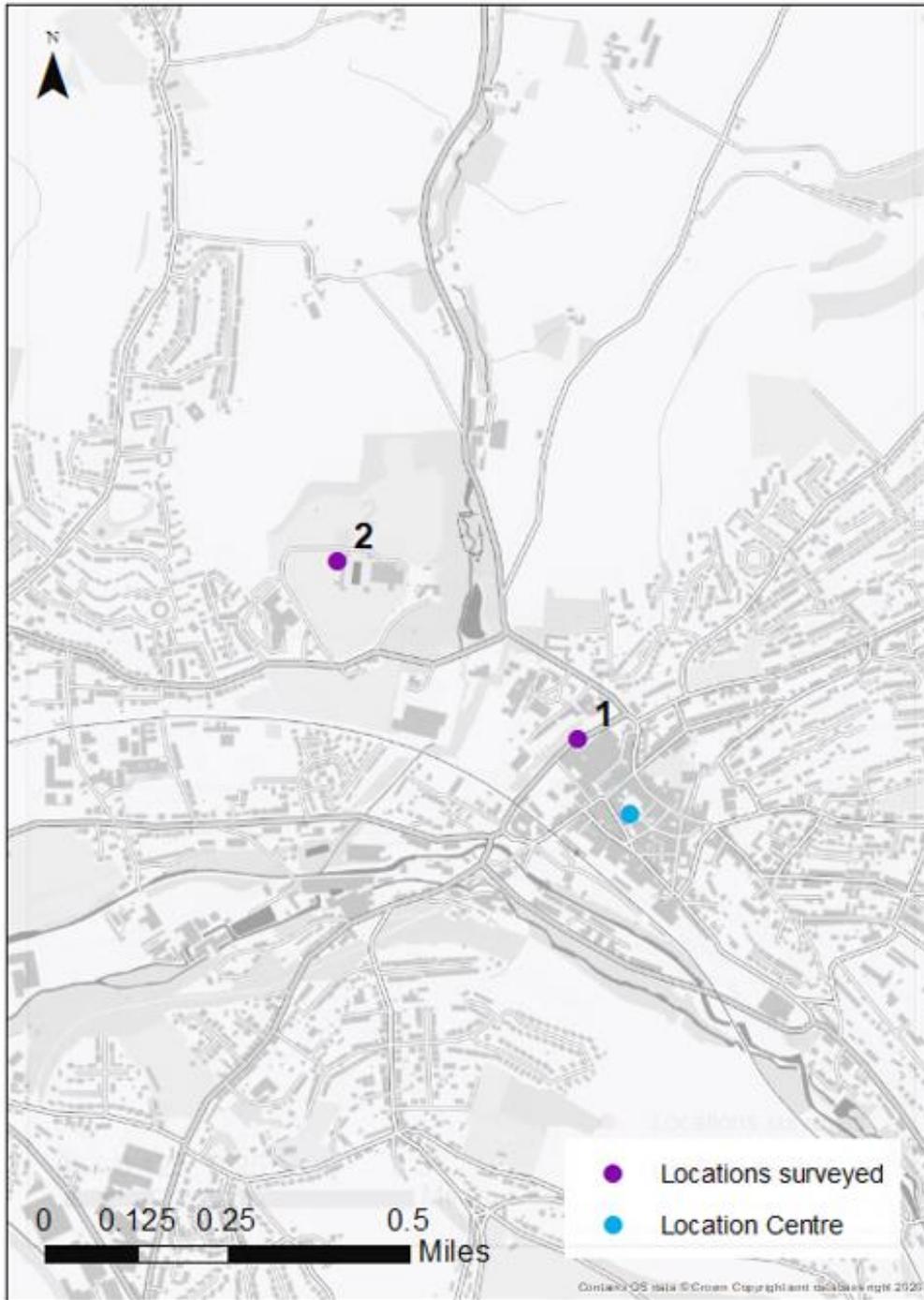


Figure 2-15 Bennetts Coach seen in Cirencester operating a scheduled school service

Table 2-3 Summary of issues for Cirencester

Type of Issue Identified	Details
Short Term	Megabus flag still in position despite services no longer stopping
Short Term (unless is a wider issue)	Due to 'ticketing systems upgrade works' tickets could not be bought from the driver for National Express services
Medium Term	Toilets were closed on visit date
Long Term	Lack of shelter on London-bound side
Long Term	No crossing at the coach stop without taking a detour
Long Term	Coaches, anecdotally, struggle to turn around in Cirencester which can cause traffic disruption

Stroud



Location Number	Location	Owner/ operator	Number of spaces for coaches	Approximate crow-fly distance from location centre	Approximate walking and wheeling distance from location centre	Additional Facilities on site/ adjacent	Services using facility
1	Stroud Coach Stop	Gloucestershire County Council	1 on each side of road	In centre	In centre	N/A	Scheduled Services
2	Stratford Road Parking Site	Stroud District Council	2	800m	1.3km	Toilets	Charter Services

Figure 2-16 Profile for Stroud

Stroud was also visited by surveyors to look at the provision of coach parking and also with the aim of meeting up with another National Express Coach, the 401 from London to Gloucester. Unfortunately, despite showing as calling at Stroud on the National Express App and Coach tracker, when surveyors visited this coach instead went straight from Swindon to Gloucester and missed out Stroud completely, potentially because there were no passengers booked to board or alight there.

Similar to Cirencester, the National Express stops in Stroud are located at a series of bus stops with QR code posters instead of timetable boards. However, some of the QR codes and information posters at Stroud were in poor condition, either being so worn that they were not easily readable or peeling off the bus shelter completely. There was, however, a clear marker on the outside of the shelter to show which stop was for National Express Coaches.



Figure 2-17 Worn National Express poster in Stroud



Figure 2-18 QR code poster coming off the shelter in Stroud

On the other side of the road the QR code poster was in better condition, however the QR code was still scratched and therefore could not be scanned. There was, however, clear National Express branding on the outside of shelters on both sides of the road were present to show passengers which stop should be used.



Figure 2-19 Scratched QR code in Stroud



Figure 2-20 National Express branded shelter in Stroud

Surveyors also visited the coach parking site located within the long-stay car park at Stratford Road. Coach parking is available for two hours, and is a short walk from the town centre and there are toilets available. However, when auditors visited, cars were found to be parked within the coach bays despite lines being clearly marked and signage being present.



Figure 2-21 Totem showing coach only parking area at Stratford Road in Stroud

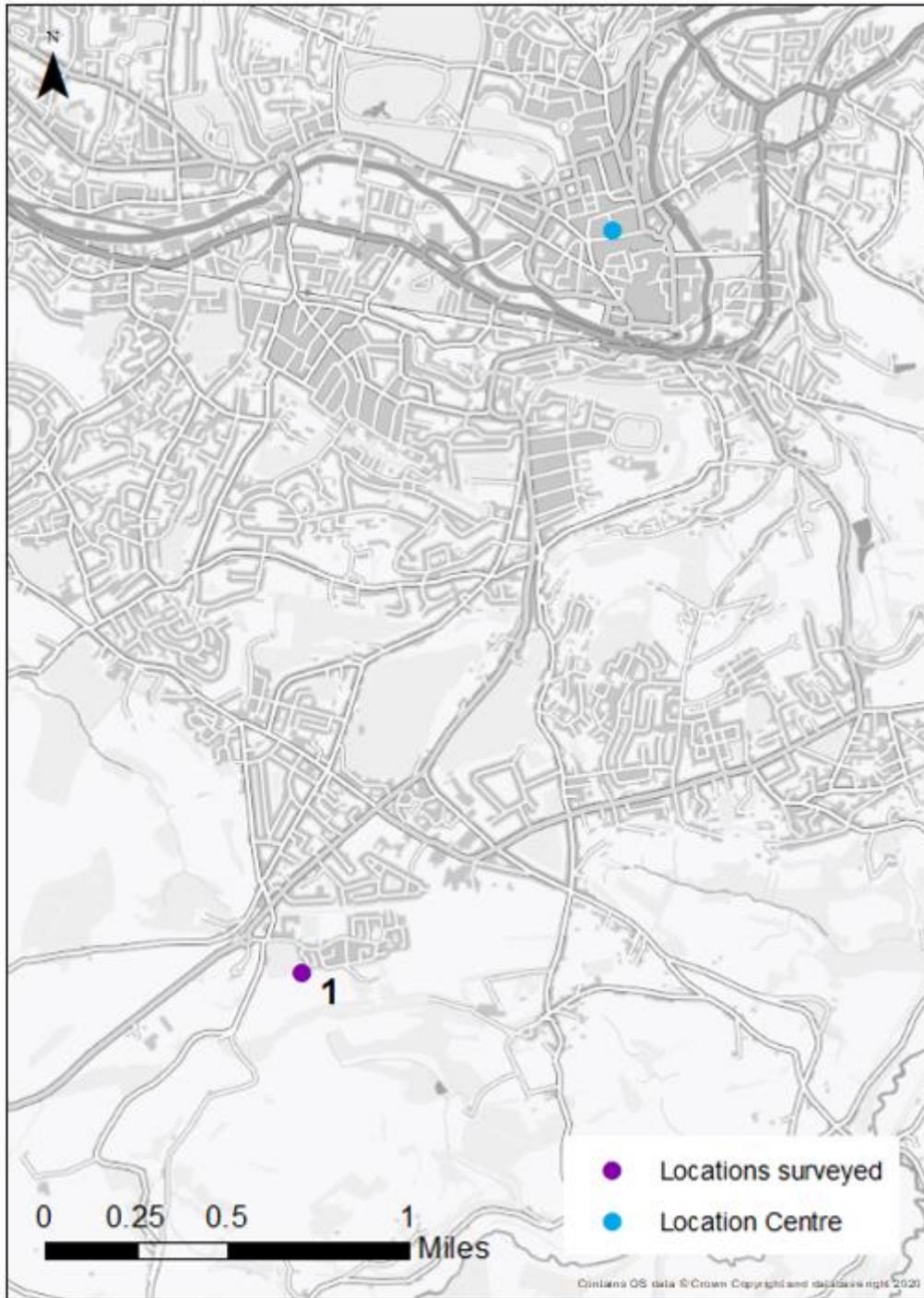


Figure 2-22 Car parked in the designated coach spots at Stratford Road in Stroud

Table 2-4 Summary of issues for Stroud

Type of Issue Identified	Details
Short Term	Very worn, scratched and peeling information posters at National Express stops
Short Term	Other vehicles parked in coach parking spaces at Stratford Road with a lack of enforcement

Bath (Odd Down Park and Ride)



Location Number	Location	Owner/ operator	Number of spaces for coaches	Approximate crow-fly distance from location centre	Approximate walking and wheeling distance from location centre	Additional Facilities on site/ adjacent	Services using facility
1	Odd Down	Bath and NES Council	29	3.5km	4.8km	Toilets	Charter Services

Figure 2-23 Profile for Bath (Odd Down Park and Ride)

Odd Down Park and Ride, just outside Bath, was visited by auditors as this was identified at the Western Gateway STB Coach Forum held in March 2025 as being a key site where drivers go to park coaches after dropping off in the centre of Bath.

The site was reasonably quiet, but there were still quite a few coaches and drivers present, especially internationally-registered coaches on tours from countries including France and Belgium. The only facilities available were a toilet block located in the car-parking area, quite a walk from where the coaches parked. The site was clean with bays clearly marked and clear information about regulations and payment.

Driver voice (3 drivers)

A number of coach drivers were interviewed at this site. Drivers in general noted the £1 all-day parking charge was very good, and much cheaper than many similar sites. One French driver, on a week-long trip from Paris to Stonehenge, Bath and Cardiff, especially noted how much they liked driving in the south west generally and the friendliness of the people that they met. Another driver noted the provision of coach parking as “perfect” with no complaints about prices or availability of bays. However, drivers did note that the site was quite far away from the city centre and that there weren’t many facilities other than toilets available.



Figure 2-24 Surveyor making observations at Odd Down

Table 2-5 Summary of issues for Odd Down

Type of Issue Identified	Details
Long Term	Site is a significant distance from Bath City Centre

Longleat



Location Number	Location	Owner/ operator	Number of spaces for coaches	Approximate crow-fly distance from location centre	Approximate walking and wheeling distance from location centre	Additional Facilities on site/ adjacent	Services using facility
1	Longleat	Longleat Enterprises Ltd.	14	250m	320m	Toilets available at park/house nearby at the attraction	Charter Services

Figure 2-25 Profile for Longleat

Longleat was visited as it is a major tourist attraction within the Western Gateway STB region. The site has a large coach park located close to Longleat House.

There were no coaches present when the site was visited by surveyors, potentially as there were no visits by coach tours or trips planned for that day (such as those undertaken by schools during school term time). There were several parking bays available as well as a footpath leading from the coach parking area to the site.

The lines were well marked, and there were toilets available at the attractions site. However, it was noted that the path leading from the coach parking area was very worn and uneven in places, with some areas where the surface had been worn away.



Figure 2-26 Coach parking area at Longleat

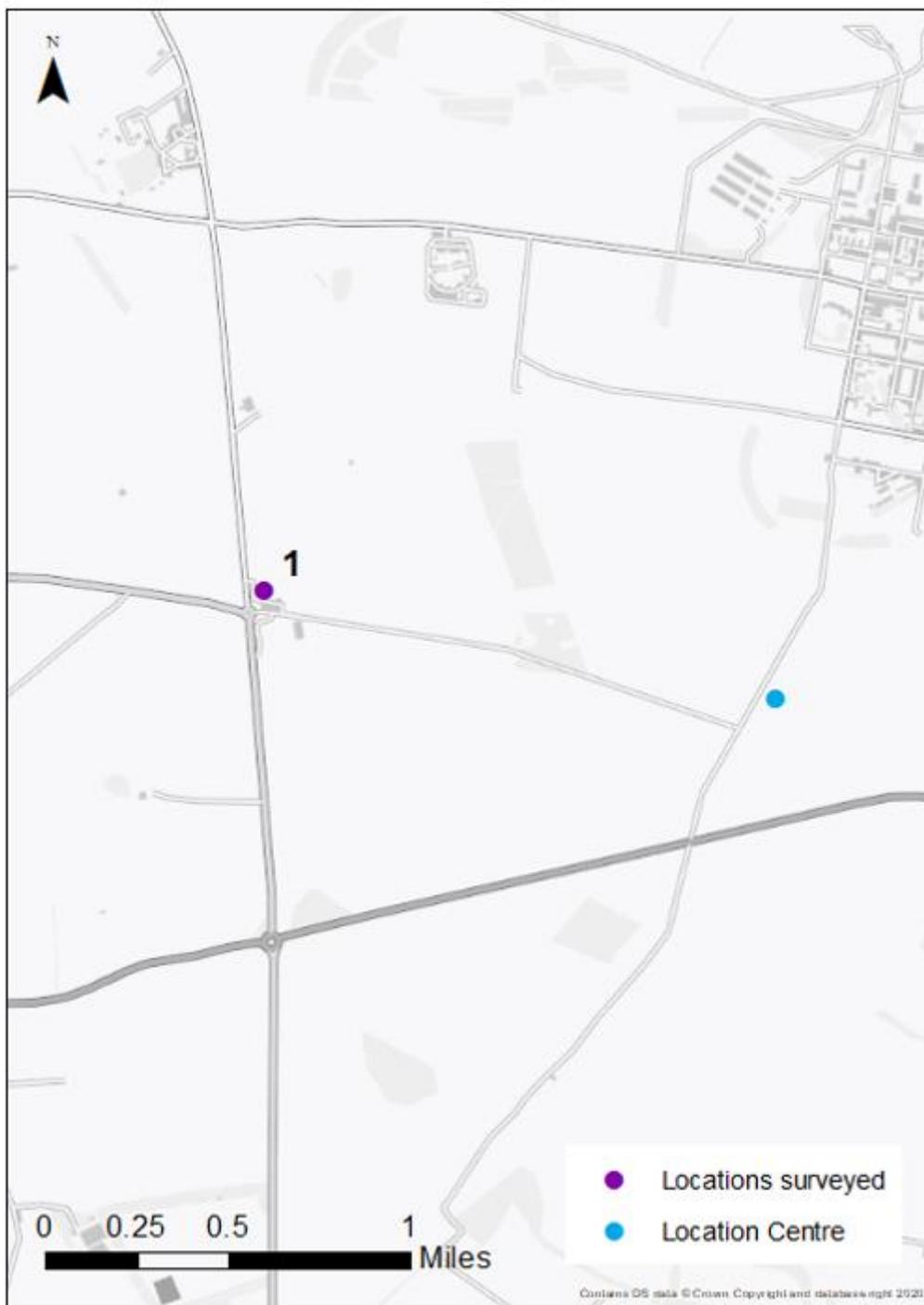


Figure 2-27 Uneven pedestrian area at Longleat

Table 2-6 Summary of issues for Longleat

Type of Issue Identified	Details
Short Term	Path from parking area to facilities is worn and uneven in places

Stonehenge



Location Number	Location	Owner/ operator	Number of spaces for coaches	Approximate crow-fly distance from location centre	Approximate walking and wheeling distance from location centre	Additional Facilities on site/ adjacent	Services using facility
1	Stonehenge	English Heritage	53	2.4km	2.8km	Toilets and food outlets available at visitor centre	Charter Services

Figure 2-28 Profile for Stonehenge

Stonehenge is one of the main attractions in the Western Gateway STB region, with a large coach park located next to the car parking area. There are clearly marked bays as well as toilets located within the coach parking area as well as a clear, segregated walking route to the attraction entrance. There is also a small shop located on the coach parking site, but this seemed to be temporarily closed when the survey was conducted. There were however other shops and facilities at the attraction entrance.

Driver voice (4 drivers)

Drivers were spoken to at the Stonehenge site. One driver noted that apparently there used to be tea and coffee available at the Stonehenge coach park which has been taken away, and drivers as a collective were annoyed by that. Another driver from Belgium was happy with the facilities, noting that there was lots of space available and was happy with the cleanliness. One other driver noted that it would be good to have a “pasty shop” or similar nearby, as well as some other shops and entertainment available. Other drivers said they were happy with the parking facilities available and that there were no improvements that needed to be made.

Passenger voice (3 groups of passengers)

Passengers on a coach from London heading on a tour to Salisbury and Stonehenge said that one key improvement would be quicker access to a café from the coach parking site, but other than that all passengers interviewed were happy with the site and didn’t really have any strong views on the facilities available. All those spoken to were on organised tours, and had chosen coach tours as they went to locations that the passengers wanted to go to and was easier than organising it themselves. Overall, passengers were also happy that they had a good visit to Stonehenge.



Figure 2-29 Coaches using the coach park at Stonehenge

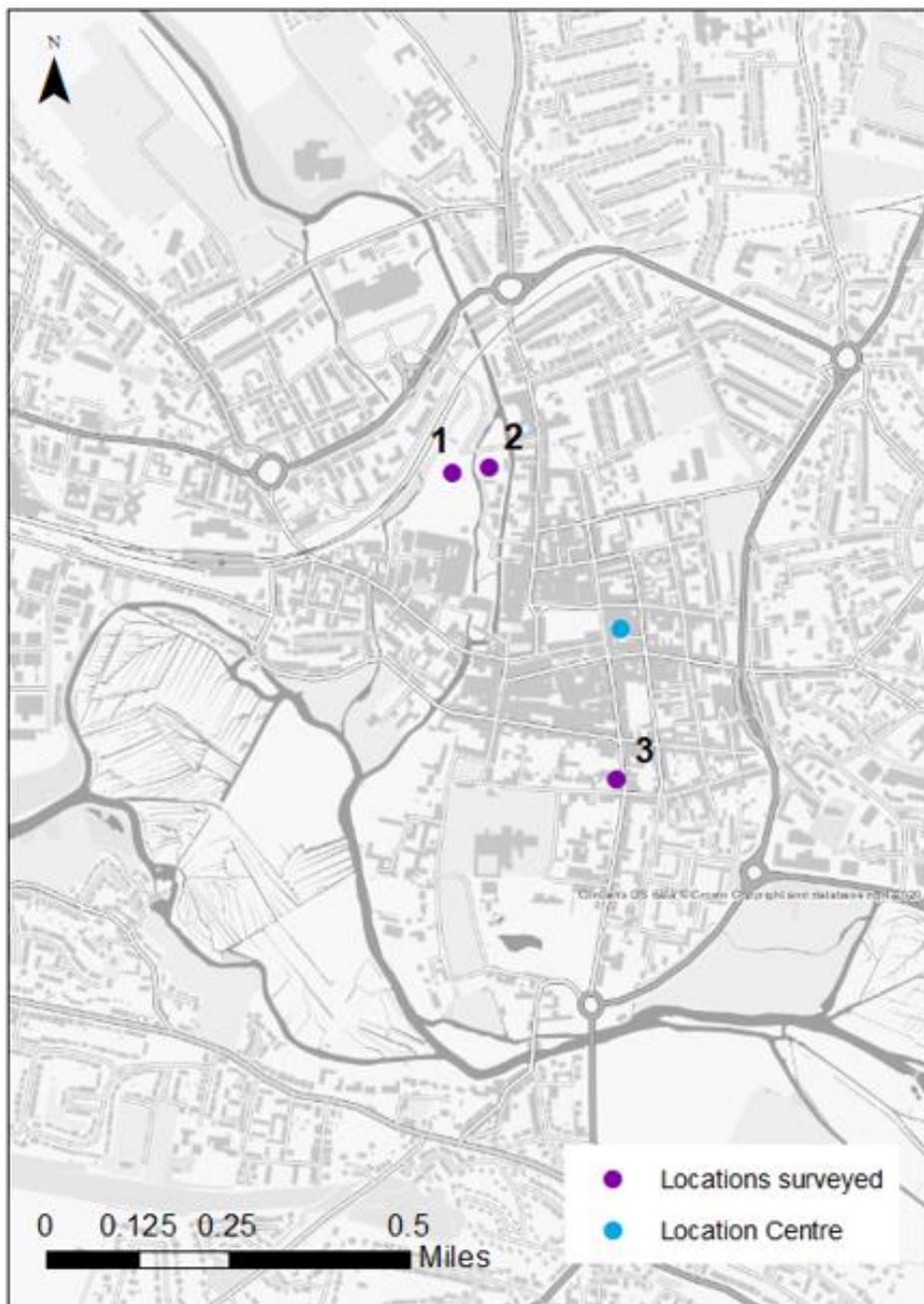


Figure 2-30 Surveyor making notes at Stonehenge coach park

Table 2-7 Summary of issues for Stonehenge

Type of Issue Identified	Details
Short Term	Small shop at coach parking site was closed when surveyors visited
Long Term	Perceived lack of food and drink options available at the coach parking site

Salisbury



Location Number	Location	Owner/operator	Number of spaces for coaches	Approximate crow-fly distance from location centre	Approximate walking and wheeling distance from location centre	Additional Facilities on site/ adjacent	Services using facility
1	Mill Stream Approach Coach Park	Wiltshire Council	10	300m	550m	Toilets	Charter Services
2	Mill Stream Approach Drop-off	Wiltshire Council	6	250m	500m	Toilets	Charter and Scheduled Services
3	St. Johns Street Drop-off	Wiltshire Council	2	350m	450m	N/A	Charter Services

Figure 2-31 Profile for Salisbury

Salisbury was visited as it has recently undergone significant improvements to its coach parking area at Mill Stream Approach (coach parking audits undertaken as part of the Western Gateway Coach Strategy in 2022 pre-dated these improvements). This re-opened in November 2024 following significant investment with both a coach parking area and a nearby 20-minute drop-off zone. Bays were clearly marked in both areas, there was lots of signage and there were toilets available adjacent to the drop-off area. There was also a clear walking route with crossing locations to the town centre.

Mill Stream Approach is also the location that National Express use in Salisbury for their 032 service linking Salisbury and London, although at the time of writing Salisbury is only served by one return journey a day, leaving in the morning and returning late at night. There did not appear to be any timetable boards available or QR codes to scan for timetables, only a large pole with the National Express logo. There also did not appear to be shelters available for any waiting passengers.



Figure 2-32 Coaches parked in Salisbury at Mill Stream Approach



Figure 2-33 Drop-off area at Mill Stream Approach



Figure 2-34 Toilets and pedestrian walking route at Mill Stream Approach



Figure 2-35 National Express totem in the drop-off area at Mill Stream Approach

Whilst the parking zone was well-used, no coaches were seen using the drop-off zone nearby. Instead, they seemed to prefer using the pick-up and drop-off area outside Salisbury Cathedral on St John's Street, which was also visited by surveyors. It is interesting that this cathedral stop is specifically signposted as being for tour and excursion coaches only, and had a particularly tight 10 minute window. One coach seen which had just picked up passengers appeared to be on a holiday tour to Bournemouth, Weymouth and the New Forest.



Figure 2-36 Coaches in the drop-off bay next to Salisbury Cathedral

Driver voice (2 drivers)

There were several coaches utilising the coach parking area at Mill Stream Approach, with a couple of drivers around which were spoken to. One driver, on a designated stop with coach passengers travelling from Essex to Sidmouth in Devon, noted an improvement in the new site compared to the old one. However, they did note that the new coach parking area was a “bit of a walk” to facilities, and that one improvement would be a café for drivers.

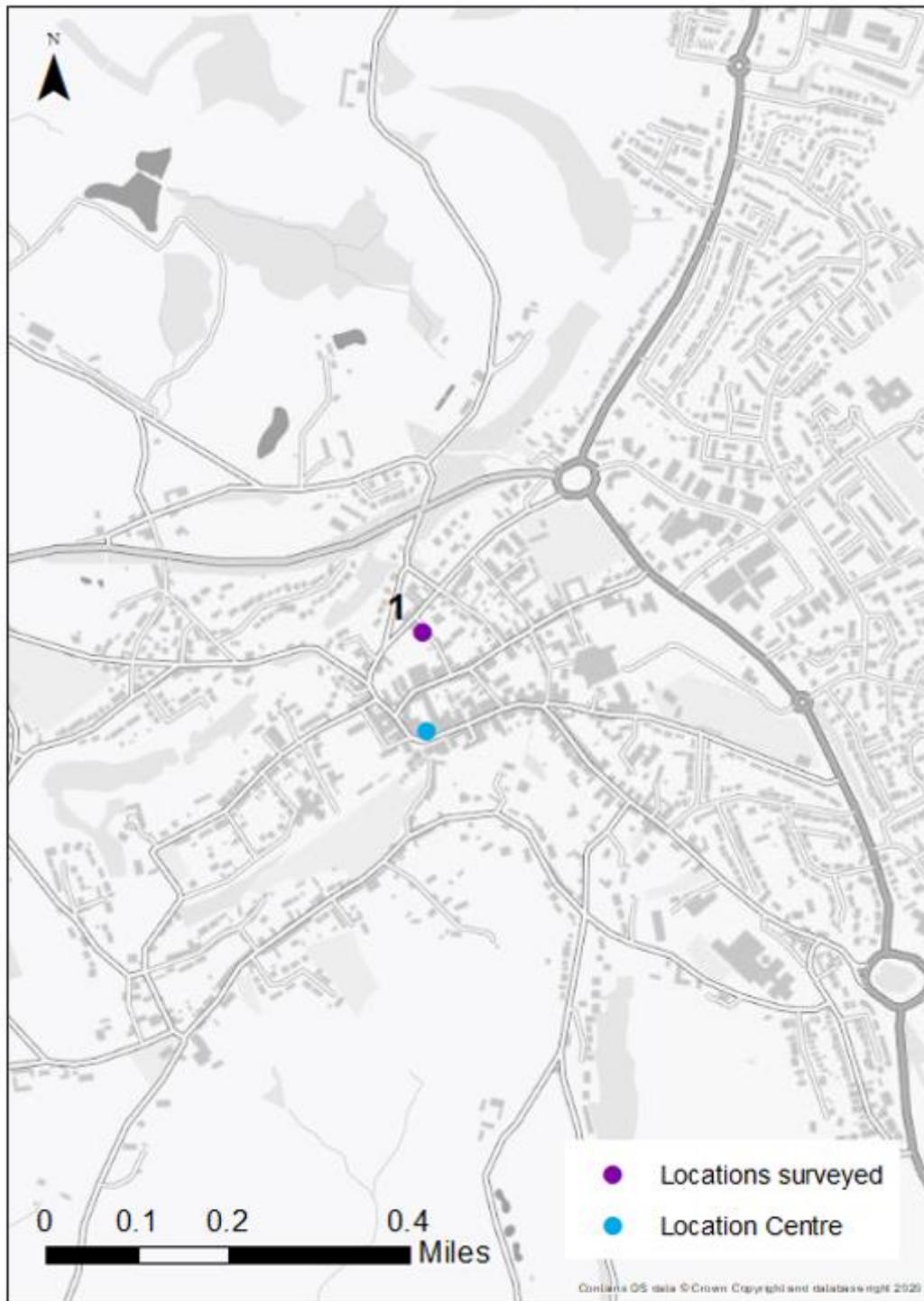
This driver used the designated drop-off/pick-up in the town centre outside Salisbury Cathedral, and said that it was well-located. This coach was seen later in the day using this pick-up point to collect passengers. Along with another coach seen on a tour, this shows Salisbury as a popular location for a stop off as part of a longer initial journey to a holiday destination.

Another driver from Belgium said that they were not aware where toilets were available, or where the pick-up and drop-off areas were located. This driver said that more signage would be useful, especially for foreign drivers or those that were unfamiliar with the area.

Table 2-8 Summary of issues for Salisbury

Type of Issue Identified	Details
Short Term	Lack of shelters or timetables/QR codes at National Express pick-up and drop/off
Short Term	New signage would be good, especially for foreign drivers, according to one driver
Long Term	New parking area is a “bit of a walk” to facilities according to one driver

Shaftesbury



Location Number	Location	Owner/ operator	Number of spaces for coaches	Approximate crow-fly distance from location centre	Approximate walking and wheeling distance from location centre	Additional Facilities on site/ adjacent	Services using facility
1	Bell Street Parking Site	Dorset Council	2	100m	160m	Toilets	Charter Services

Figure 2-37 Profile for Shaftesbury

Shaftesbury has two coach parking spaces located in a car park close to the town centre, where coaches are able to stay for up to four hours. There are toilets located in the parking area as well as a walking route to the town centre. The two parking bays are clearly marked with charges made clear, although there were some potholes in the road surface and some of the other bays in the car park such as the disabled bays were quite worn. Also, as there are no other drop off areas available in the town, passengers with accessibility needs may struggle to board and leave any coaches parked in the easternmost bay, if a coach in the westernmost bay was already parked, whilst there did not appear to be a footpath linking the coach parking area, through the car park to the toilets.

When surveyors visited, a bus was found parked to be at an angle blocking both of the coach parking bays with no driver around, despite bays being clearly marked as 'Coaches Only'. Whilst no coaches turned up while surveyors were present, if any did they would not have been able to use the bays due to the presence of the bus.



Figure 2-38 Bus parked at an angle across two coach parking bays in Shaftesbury



Figure 2-39 Worn markings and toilet block in Shaftesbury

Table 2-9 Summary of issues for Shaftesbury

Type of Issue Identified	Details
Short Term	Bus parked at an angle across coach parking bays
Medium Term	Potholes and worn lines within the parking area
Long Term	Lack of walkway from the parking area to the toilet block that is wide enough for those with accessibility needs
Long Term	Passengers with accessibility needs in a coach parked in the easternmost coach parking bay may struggle if a coach is already parked in the westernmost bay

Corfe



Location Number	Location	Owner/ operator	Number of spaces for coaches	Approximate crow-fly distance from location centre	Approximate walking and wheeling distance from location centre	Additional Facilities on site/ adjacent	Services using facility
1	Purbeck Park	Dorset Council	3	900m	1.3km	Toilets at Swanage Railway	Charter Services
2	Corfe Castle Visitor Centre	National Trust	2	400m	500m	Toilets and Visitor Centre	Charter Services

Figure 2-40 Profile for Corfe

Corfe is a small village in Dorset which is popular with tours and trips. It has a castle and is also on the route of the Swanage railway which is popular with visitors.

Surveyors visited two sites in Corfe. The first was at the Purbeck Park site for the Swanage Railway which is located just outside the village. This had a curved parking area with very worn lettering on the ground, although there was a supplementary green sign which said 'Coaches Only' and that drivers should pay at the meter. There were also some cars seen that were stopped in the coach parking area, and as it is very close to the attraction entrance the coach parking area seemed to be used as an informal drop-off area for cars. Toilets were available at the nearby Norden station for the Swanage Railway.



Figure 2-41 Worn markings in the coach parking area at the Purbeck Park site



Figure 2-42 Cars parked in the coach area at the Purbeck Park site

Surveyors also visited the coach parking area at the Corfe Castle National Trust car park, which had one coach parked as part of a small coach parking area, as well as a minibus. There was very little space for coaches to manoeuvre, and when the coach that was parked was trying to get out the driver had to make a number of small movements in order to leave the parking area without hitting other vehicles.

The coach in this parking area was taking a tour group on a day trip to the Swanage Railway as part of a week-long tour from Kent, staying in Weymouth. The coach had just dropped the group off and the driver was about to drive to Swanage to pick them up again at the other end.

Driver voice (1 driver)

The driver of this coach said that the cost of parking a coach in the south west was the main issue that they faced, especially in Weymouth, with the overall coach parking bill for the week expected to be £150. Lulworth Cove was “the worst” in terms of charges. The driver was one of a few over the week who mentioned the Isle of Wight’s approach to parking which offers a flat rate for coach parking across several different sites. The driver did say that they really enjoyed their job and normally do work elsewhere in Europe such as Ireland and Tuscany.

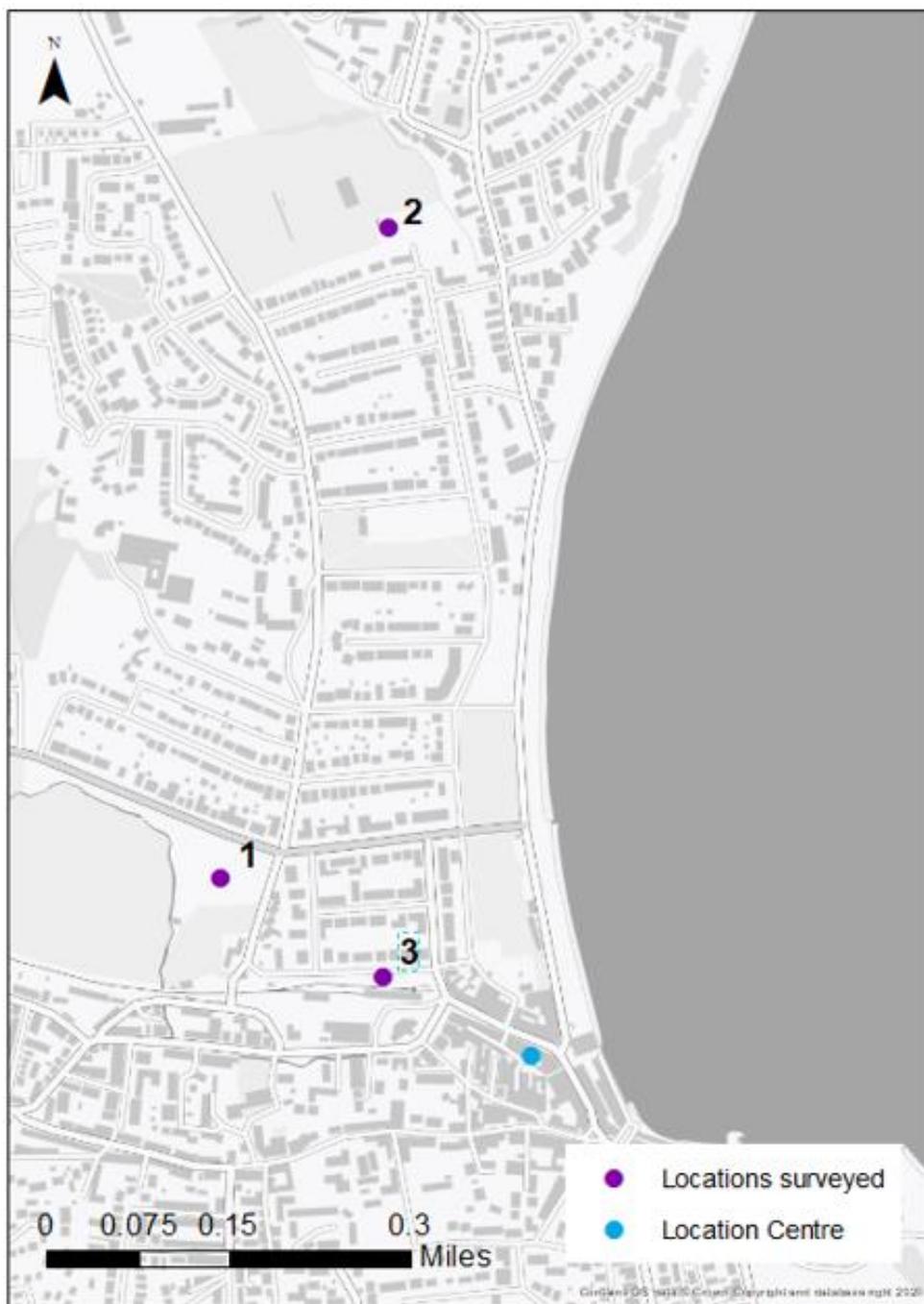


Figure 2-43 Coach parked in the Corfe Castle National Trust parking area

Table 2-10 Summary of issues for Corfe

Type of Issue Identified	Details
Short Term	Worn lines in the coach parking area at Purbeck Park
Short Term	Car stopped in the coach parking area at Purbeck Park
Long Term	Very little space for coaches to manoeuvre at the Corfe Castle National Trust parking site

Swanage



Location Number	Location	Owner/ operator	Number of spaces for coaches	Approximate crow-fly distance from location centre	Approximate walking and wheeling distance from location centre	Additional Facilities on site/ adjacent	Services using facility
1	Main Beach Parking Site	Swanage Town Council	14	500m	800m	Toilets	Charter Services
2	North Beach Parking Site	Swanage Town Council	8 (mixed-use for large vehicles)	1km	1.3km	Toilets	Charter Services
3	Gilbert Road	Dorset Council	2 (on street pick up/drop off only with 15-minute waiting restriction)	200m	300m	N/A	Charter Services

Figure 2-44 Profile for Swanage

Surveyors visited several locations in Swanage. The main location for coach parking is the parking area on Victoria Avenue which only had a minibus parked within it when visited. This had several parking bays available with clearly marked lines and had public toilet facilities available at the far end.



Figure 2-45 Victoria Avenue parking area in Swanage

Surveyors also visited the North Beach parking area which is signposted as an overflow coach parking area from the location on Victoria Avenue. This had some multi-use spaces available for any vehicles over 4.8 metres with another minibus parked in this location. The road lines were clearly marked however the road surface was uneven in places. Toilets were available nearby.



Figure 2-46 North Beach parking area in Swanage

A pick-up/drop off area within Swanage town on Gilbert Road was also visited by surveyors, who found the same coach that had been seen at Corfe waiting to pick up passengers who had been riding on the Swanage railway. This offers a 15-minute window for picking up and dropping off, and had space for several vehicles. Despite being signposted as a coach drop-off point, the parking area had 'Buses' painted as white lines on the ground.



Figure 2-47 Coach in pick-up/drop-off area on Gilbert Road in Swanage

Table 2-11 Summary of issues for Swanage

Type of Issue Identified	Details
Short Term	'Buses' painted on the pick-up/drop-off on Gilbert Road, rather than 'Coaches'
Medium Term	Uneven road surface at North Beach Coach Parking area

Lulworth Cove



Location Number	Location	Owner/ operator	Number of spaces for coaches	Approximate crow-fly distance from location centre	Approximate walking and wheeling distance from location centre	Additional Facilities on site/ adjacent	Services using facility
1	Lulworth Cove	Lulworth Estate	10	300m	480m	Toilets	Charter Services

Figure 2-48 Profile for Lulworth Cove

Lulworth Cove is a popular tourist destination on the Dorset Coast. It is part of the wider Lulworth Estate and therefore the car/coach park and associated parking charges are overseen by this estate. The surface is gravel which was quite uneven and there were no markings to show specific spaces, though there were toilet facilities available.

The coach park at Lulworth consists of a large gravel area which is segregated from the car park, and with large signage to show that the area is for coaches only and that it is private property. The charges at Lulworth Cove were very high, at £20 for 1 hour, £35 for up to 4 hours and £45 for all day parking. Although there were no coaches present during the time auditors were present, multiple drivers spoken to at other locations mentioned the high prices for coach parking at Lulworth Cove.



Figure 2-49 Coach parking area at Lulworth Cove

Table 2-12 Summary of issues for Lulworth Cove

Type of Issue Identified	Details
Medium Term	Uneven surface with no lines showing bays
Long Term	Very high parking charges for coaches

Bovington Tank Museum/Monkey World



Location Number	Location	Owner/ operator	Number of spaces for coaches	Approximate crow-fly distance from location centre	Approximate walking and wheeling distance from location centre	Additional Facilities on site/ adjacent	Services using facility
1	Bovington Tank Museum	The Tank Museum Ltd	3 (with additional overflow during peak periods)	In centre	In centre	Various toilets at attraction	Charter Services
2	Monkey World	Monkey World Ltd	Several (part of gravel car park)	In centre	In centre	Various toilets at attraction	Charter Services

Figure 2-50 Profile for Bovington Tank Museum/Monkey World

Surveyors met up with two group tours from Barnes Coaches on day trips to two key tourist attractions in Dorset, Bovington Tank Museum and Monkey World. This used one coach which would pick-up and drop-off different passengers at each site to spend the day there. Surveyors spoke with the driver and several passengers.

Driver voice (1 driver)

The driver of the coach said that he spends lots of time driving in the south west and generally finds no issues with coach driving and parking in the region. The one exception was Lyme Regis, where he said coaches are not welcomed by locals, and that coaches are expected to park in Charmouth Road which is a significant walk from the seafront and town centre. Weymouth and Portland were all described by the driver as being “good” whilst parking at Queens Road in Bournemouth is preferred to Kings Park as it is closer to the town centre.

This driver was also aware of the issues in the Cotswolds villages of Bourton-on-the-Water and Bibury including “boycotts” of locations that are considered as not friendly to coaches. He said that one option to make parking easier for coach drivers may be for Dorset to adopt an “Isle of Wight approach” which offers a flat rate for coach parking across several different sites, rather than needing to pay separately to park in different locations. This idea was mentioned by a few drivers separately over the week.

Passenger voice (6 passengers/groups)

For the passengers spoken to, one female solo passenger likes using the coach for tours like these as they said they struggle with mobility and therefore don’t need to rush for the coach. Two teenagers who were friends said they don’t drive and therefore it is easy for them to get the coach, though they did say they would like toilets by the pick-up point.

A young family of 4 said that it was easy to get the coach and not have to think about timings or logistics. One improvement for them would be a seating area by the pick-up point and some shelter would be useful for if it was raining. Another family said that using the coach to visit the attraction was easier than driving.

A family of 3 said that their son preferred using coaches over the train as they find the trains can often be crowded. And another couple were from abroad and visiting friends in Swindon, so decided to book the coach as part of their visit. Because of this, they didn’t have a car in the UK, and found it easy to book the coach.



Figure 2-51 Coach parked at Bovington Tank Museum

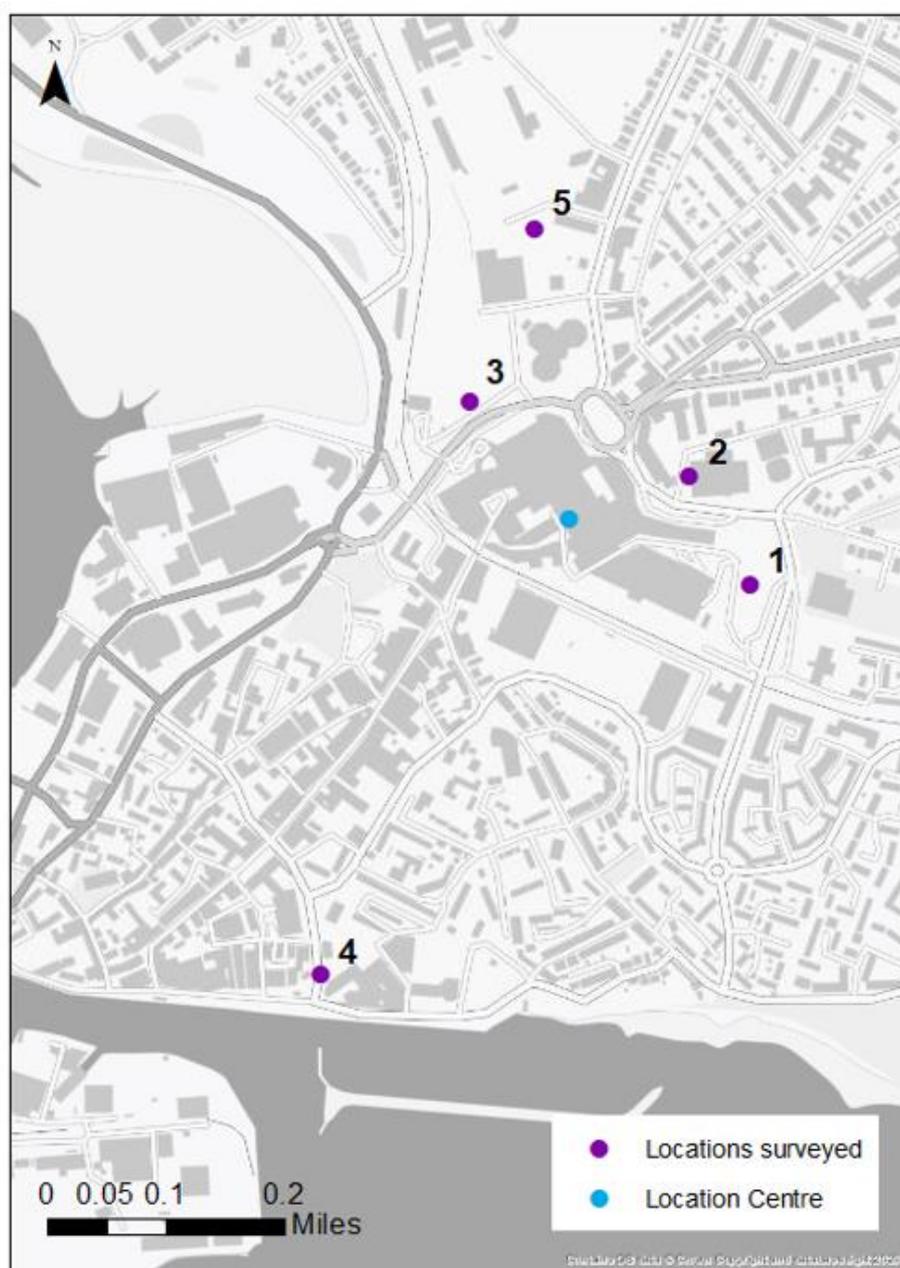


Figure 2-52 Coach picking up passengers at Monkey World

Table 2-13 Summary of issues for Bovington Tank Museum/Monkey World

Type of Issue Identified	Details
Long Term	Some passengers wanted toilets available at pick-up points and shelters available for if it was raining

Poole



Location Number	Location	Owner/ operator	Number of spaces for coaches	Approximate crow-fly distance from location centre	Approximate walking and wheeling distance from location centre	Additional Facilities on site/ adjacent	Services using facility
1	Seldown Coach Park	BCP Council	8	In centre	In centre	Toilets and shops in Bus Station	Charter and Scheduled Services
2	Seldown Lane Drop-Off	BCP Council	1	In centre	In centre	N/A	Charter Services
3	Serpentine Road Drop-off	BCP Council	2	In centre	In centre	N/A	Charter Services
4	Old Orchard Drop-Off	BCP Council	1	700m	800m	N/A	Charter Services
5	Poole Stadium	BCP Council	10	500m	650m	Toilets in Poole Stadium when open	Charter Services

Figure 2-53 Profile for Poole

Surveyors visited several locations in Poole. The main location was the coach park on Seldown Road which had several coaches parked within it as well as a double-decker bus. Facilities were available at the nearby Poole Bus Station.

Driver voice (1 driver)

One driver at this site said that they had been driving coaches for over 30 years and enjoyed the job, and especially that they were able to spend lots of time driving in Europe and visiting different places. However, this was only the second time they had driven for a coach tour in the south west. Although the driver said from their experience so far that they were “always able to park in the south west”, more generally they said there are lots of places that want tourists but that don’t want the coaches associated with the tourists.



Figure 2-54 Coaches parked at the Seldown Road site in Poole

Located across from the coach parking area is the terminating point for National Express coaches with a few different routes originating and terminating at Poole. There were several National Express branded shelters available as well as posters with QR codes for passengers to get timetable information. There were also Megabus posters, even though Megabus no longer serves this location. Surveyors timed their visit to coincide with a coach about to commence its journey on route 035 which runs from Poole to London.

Passenger voice (2 groups)

Two passengers, a mother and daughter, chose the coach because they said that they “hate the train because of the gap” (presumably between the train and the platform) and were making the full journey to London to visit family.

Another young family of 4 were from around the Poole area, and also going the full journey distance to London, chose to use the coach because it is cheaper than using the train.

Driver voice (1 driver)

The driver of this service was also spoken to. They had been driving coaches for 10 years after 2 years driving HGVs and 2 years driving buses. The driver said that there are no facilities available for drivers in Poole but that they are able to use the toilet on the coach. The driver said that they are annoyed by young passengers in particular and that there is an issue with “young kids vandalising coaches”. They also said that when Megabus operated services, they would cause issues by parking in National Express coach spaces.



Figure 2-55 National express branded shelter in Poole



Figure 2-56 Poster in a shelter in Poole with a National Express QR code and a Megabus poster, even though Megabus no longer serve the stop



Figure 2-57 National Express 035 service in Poole

Surveyors also visited the pick-up and drop-off point for the Poole Lighthouse venue which is located on Seldown Lane. One coach was parked there from Excelsior Coaches, whose depot was visited later in the week as part of the operator visits.

Driver voice (1 driver)

The driver of this coach said that they were picking up a language school to take them on a trip to Durdle Door. The driver had been driving coaches for 21 years after starting doing school runs and enjoyed their job, especially meeting people. They said that there are good facilities available at Go-Ahead depots across the south west and in London (Excelsior Coaches are part of the wider Go-Ahead group). Salisbury was highlighted as a particularly good location now that the coach parking area is open again, and London is particularly bad, although it is good that they are able to use the Go-Ahead garage at Waterloo.



Figure 2-58 Coach observed in drop-off area outside Poole Lighthouse

Surveyors also visited the pick-up and drop-off point located on Old Orchard, close to the quayside in Poole. One coach was seen here, which is the same vehicle whose driver was spoken to at Seldown coach park earlier that day. The bay was clearly marked and signposted, though the white lines were not wide enough for coaches to fit in fully.



Figure 2-59 Coach observed in drop-off area on Old Orchard

Another location visited was the drop-off area located on Serpentine Road on the approach to Poole railway station. This was very large and had space for several coaches, though none were present at the time of the surveyors' visit. In line with the other locations in Poole, coaches only had 10 minutes to pick-up and drop-off passengers. The lines were clearly marked and the signpost was legible, although the lettering was starting to peel off.



Figure 2-60 Drop-off area on Serpentine Road in Poole



Figure 2-61 Sign with peeling lettering on Serpentine Road in Poole

Finally, surveyors visited the Poole Stadium lorry and coach park, which at time of visiting had several HGVs present but no coaches. The road surface was good and there was plenty of space available, but no nearby facilities that were open.



Figure 2-62 Stadium Coach and Lorry park in Poole

Table 2-14 Summary of issues for Poole

Type of Issue Identified	Details
Long Term	Megabus posters still present at Seldown Road even though these no longer serve Poole
Long Term	Lack of facilities available for National Express drivers in Poole
Long Term	White lines not wide enough for coaches in the bay on Old Orchard
Long Term	Lack of facilities available close to Poole Stadium (when stadium is closed)

Bournemouth



Location Number	Location	Owner/ operator	Number of spaces for coaches	Approximate crow-fly distance from location centre	Approximate walking and wheeling distance from location centre	Additional Facilities on site/ adjacent	Services using facility
1	Bournemouth Coach Station	BCP Council	9	1.5km	1.8km	Toilets, Travel Centre, Booking Office	Scheduled Services
2	Queens Road	BCP Council	10	1.5km	1.7km	N/A	Charter Services
3	King's Park	BCP Council	9	3.3km	3.7km	Toilets at Athletic Club	Charter Services
4	Westover Road Drop-Off	BCP Council	2	In centre	In centre	Toilets in Bournemouth Pavilion	Charter Services
5	Bournemouth International Centre Drop-Off	BCP Council	1	In centre	In centre	Toilets on Seafront	Charter Services

Figure 2-63 Profile for Bournemouth

Surveyors visited several sites in Bournemouth. This included Bournemouth Coach station, where surveyors met up with a number of services.

Passenger voice (7 passengers/groups)

Surveyors spoke to several passengers at this location travelling on a couple of different routes, the 035 which runs to London and the 160 which runs all the way to Birmingham.

For the 035, one older lady from Leicester had come as part of a group from Leicester to attend a conference. She doesn't drive and therefore they all booked on the coach to and from Leicester via Victoria. She was "super happy" about the services and praised the cafe at Bournemouth Coach Station in particular.

Another family of 4 were going to Chessington in South West London to visit family. They said that they chose the coach because it was cheaper, as did another family of 3.

Two friends who were visiting Peterborough and they also said that they chose the coach as it was cheaper than the train. Whilst they were travelling with National Express this time, they said that they would like the FlixBus from London to be more regular. They also said that one issue with Bournemouth Coach Station is that the toilets were closed early sometimes.

Another young family of 4 were going to London to spend two nights before heading back to Germany. They said that they didn't even think about using the train and didn't even know where the train station in Bournemouth was. They also said that they didn't have a car.

For passengers on the 160 route, one was only travelling as far as Southampton. They used the route regularly and said that they never had a problem with reliability. They also chose the coach due to cost, saying it was only £6 to Southampton by coach but would be £16-£20 by train. They also said that they lived close enough to the coach station to be able to walk there.

Another passenger said that the coffee shop was good, but one improvement they would make would be to have somewhere at the coach station where they could eat and drink.

Another passenger using this service said that they were travelling to Oxford, and that the reliability was also very good. When asked if they would like a more frequent service (as the 160 only runs three times a day in each direction) they said that this would not benefit them as 11:10 is a good time. This passenger also said that they did not have a car and that the train to Oxford was much more expensive.

It was interesting to see that many passengers on the 035 were making longer journeys, with London not always their final destination, whilst passengers on the 160 were making shorter journeys.

The coach station at Bournemouth is large with several bays, each assigned to particular National Express routes. There is also a National Express ticket and information office, showing a live departures board, as well as a local travel and visitor information office which had BCP Council branding. There was also a coffee shop available. Toilets were available but only open from 8am-5pm, which seemed particularly restrictive given the broad range of coach services operating to and from the coach station at various hours of the day. There were lots of benches available for people to sit and the coach station was covered to protect passengers from rain.



Figure 2-64 Example of a marked bay with board showing the routes served



Figure 2-65 Local Travel and Visitor Information centre



Figure 2-66 Coffee Shop and National Express tickets and information point



Figure 2-67 National Express Route 035 coach

Surveyors also visited some of the key coach parks in Bournemouth. The first of these was Queen’s Road which is located in the west of the city close to the A338. This had several coaches present, and most seemed to have been parked overnight as part of tour groups staying at local hotels with a number of foreign-registered coaches present.

There were no facilities present other than a co-op convenience store located across the road. However, the coach parking area was well signposted including local area maps within the coach park itself. Whilst the coach park itself was clean, there was lots of rubbish in the nearby car parking area. It also appeared as though the coach park may have been full the previous night as there was a coach parked at the far west end of the coach park outside of the marked bays.

Driver voice

Surveyors spoke to one driver here who was on a tour that had come from Yorkshire and was staying in Bournemouth for a week. He said that he had paid for a week’s parking but did not know if there would be space, and if there wasn’t he would have to go to King’s Road which is a long way away. The driver said that there were lots of cars and motorhomes that used the car park, taking up limited space available. He also said that toilets would be useful as the nearest ones he can use are at the hotel he and the guests are staying at which is a 17-minute walk away.



Figure 2-68 Coaches parked at Queens Road in Bournemouth



Figure 2-69 Litter in the car and coach park on Queens Road



Figure 2-70 Coach parked at the far side of Queens Road coach park outside marked bays

Surveyors also visited King's Park Coach Park, located in the east of Bournemouth close to the city's football stadium. There were several marked bays, though no coaches present at the time of the visit. The road surface was tarmac although seemed to be uneven in places and some of the yellow hashed lined were very worn. Facilities were available at the nearby football stadium and athletics club, though there were none dedicated to the coach parking.



Figure 2-71 Kings Park coach parking area

Surveyors also met up with Richard Barnes of BCP council to observe some of the coach drop off areas in the centre of Bournemouth. The first was on Westover Road outside Bournemouth Pavilion, which offers 15 minutes of drop-off and space for several coaches. Lines were clearly marked, although spaces did have 'Buses' marked rather than coaches, although Richard said that there was no guidance in TRO about bus and coach guidelines. The lift that linked the pavilion with the lower gardens was also broken, reducing accessibility, with Richard saying it had been out of order for around a month.



Figure 2-72 Drop-off area outside Bournemouth Pavilion



Figure 2-73 Drop-off area outside Bournemouth International Centre



Figure 2-74 Coach seen parked on Approach Road



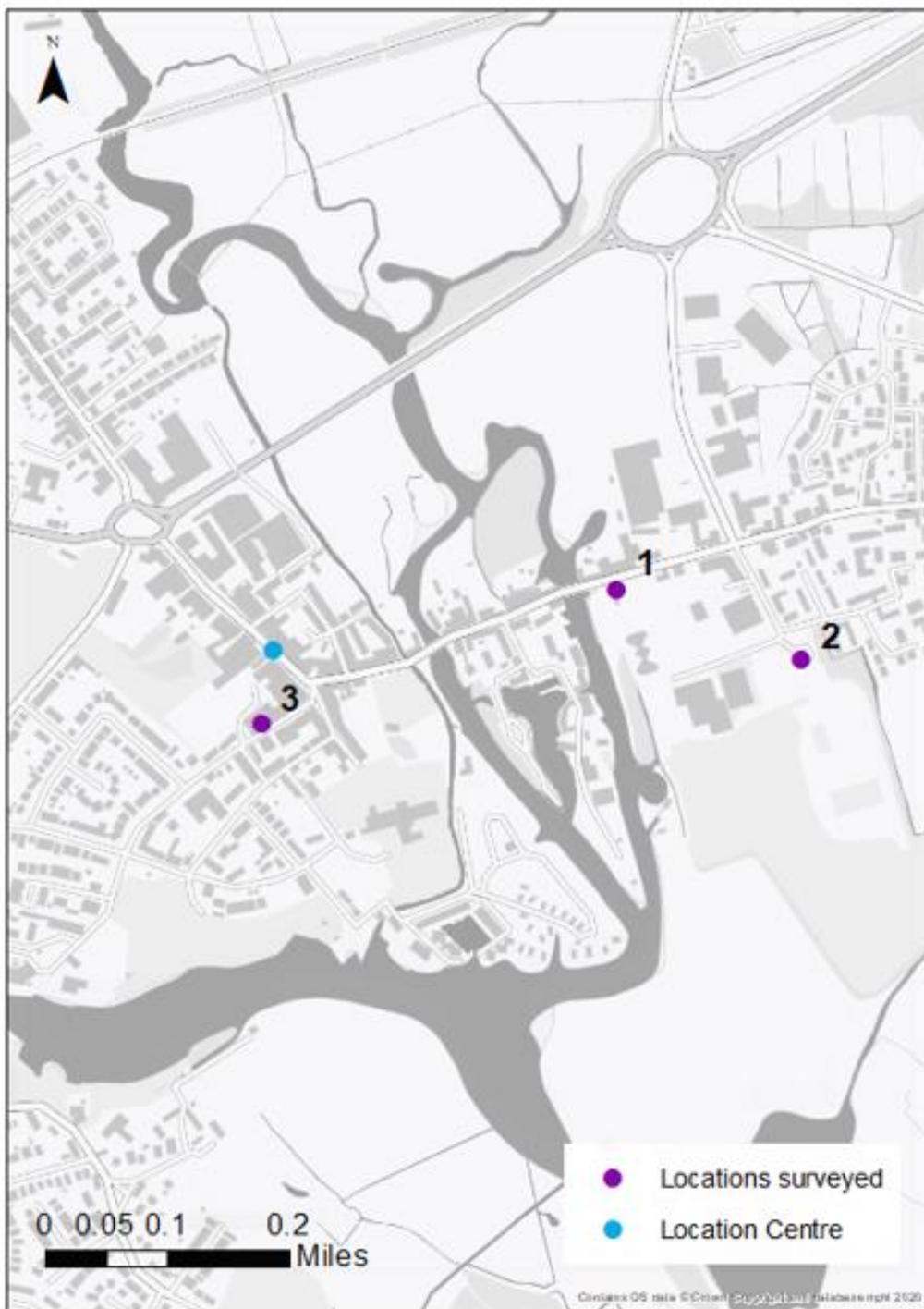
Figure 2-75 Surveyor with Richard Barnes from BCP Council

The next drop-off location was on South Cliff Road outside Bournemouth International Centre which was close to the seafront and marked as a bus stop. Richard said that in the summer there would be large groups using this stop for the Bournemouth International Centre. No coaches were seen using the designated drop-off at the time of the visit, however a coach was seen parked round the side of Bournemouth International Centre on Approach Road.

Table 2-15 Summary of issues for Bournemouth

Type of Issue Identified	Details
Short Term	'Buses' painted on the pick-up/drop-off outside Bournemouth Pavilion, rather than 'Coaches'
Short Term	The lift linking Bournemouth Pavilion with the lower gardens was broken
Short Term	Bus Stop painted on the pick-up/drop-off outside Bournemouth International Centre
Short Term	Litter in the parking area at Queens Road
Medium Term	Uneven tarmac and worn lines at Kings Park
Long Term	Lack of facilities dedicated to coaches available at Kings Park
Long Term	Toilet opening hours at Bournemouth Coach Station seemed very restrictive (8am-5pm) and was backed up by passengers
Long Term	Some passengers wanted somewhere they could eat and drink at Bournemouth Coach Station
Long Term	Lack of coach parking spaces and facilities at Queens Road

Christchurch



Location Number	Location	Owner/ operator	Number of spaces for coaches	Approximate crow-fly distance from location centre	Approximate walking and wheeling distance from location centre	Additional Facilities on site/ adjacent	Services using facility
1	Civic Centre Drop-Off	BCP Council	1	500m	550m	N/A	Charter Services
2	Riversmeet Leisure Centre	BCP Council	3	750m	850m	Toilets in Leisure Centre	Charter Services
3	Wick Lane Drop-off	BCP Council	1	In Centre	In Centre	N/A	Charter Services

Figure 2-76 Profile for Christchurch

Christchurch has a designated drop-off point at the entrance to the Bridge Street Car park, which was marked on the ground as a bus stop. This had toilet facilities available, though at time of visiting had a HGV parked in it as part of some construction work going on in the local area. This drop-off point was located right next to a set of public toilets and was within walking distance to the town centre.



Figure 2-77 Construction vehicle in the coach drop-off bay in Christchurch

Surveyors also visited the coach parking area which consists of three spaces on a roundabout at the entrance to the Riversmeet Leisure Centre. Bays are clearly marked and whilst there are no facilities available dedicated to the coach parking, there are at the leisure centre nearby. This parking area is a slightly longer walk from the town centre compared to the drop-off point.



Figure 2-78 Part of the coach parking area in Christchurch

Finally, surveyors visited a drop-off point on Wick Lane which is a narrow lane just off the main High Street. Richard Barnes from BCP Council noted that this is a point that the council is looking to remove as it is considered not big enough and coaches get stuck there. However, the site as it exists is very well located and close to local shops and amenities. Like some of the other sites, the road markings show 'Buses' rather than coaches.



Figure 2-79 Drop-off area on Wick Lane in Christchurch

Table 2-16 Summary of issues for Christchurch

Type of Issue Identified	Details
Short Term	'Buses' painted on the pick-up/drop-off on Wick Lane, rather than 'Coaches'
Short Term	HGV parked in drop-off bay outside former Civic Centre
Long Term	Lack of facilities dedicated to the coach parking at the entrance to Riversmeet Leisure Centre

Bournemouth Airport



Location Number	Location	Owner/ operator	Number of spaces for coaches	Approximate crow-fly distance from location centre	Approximate walking and wheeling distance from location centre	Additional Facilities on site/ adjacent	Services using facility
1	Bournemouth Airport	Regional and City Airports	N/A	At Airport	At Airport	Toilets and food outlets at airport	Charter Services (Currently)

Figure 2-80 Profile for Bournemouth Airport

Surveyors made a brief stop at Bournemouth Airport to review their existing provision for coaches. The intention of this visit was to note any existing provision with the knowledge that this is expected to change in the future as part of redevelopment work. AECOM has also been in contact separately with Bournemouth Airport to understand their future intentions for coaches at the airport.

The airport does not currently have any regular or public coach services in operation, and coach operations are currently limited, by demand and operator commercial interest, to private groups only. Within the publicly accessible area, there is currently a temporary bus stop across from the arrivals area which is used by MoreBus services to Bournemouth.

As part of the planned redevelopment and expansion of the airport passenger terminal facilities, the airport plans to provide a new passenger interchange area which will include enhanced provision both for local bus operations (current, in existence) and also for coach operations (both regular, should there be sufficient commercial/operator demand, as well as private charter). These are subject to local authority planning approval.



Figure 2-81 Temporary bus stop and pedestrian route at Bournemouth Airport

Table 2-17 Summary of issues for Bournemouth Airport

Type of Issue Identified	Details
Short Term	No current provision for coaches (but this is planned in the future as part of the planned redevelopment and expansion of the airport passenger terminal facilities)

3. Operator Visits

This section shows a record of discussion which took place at the depots of four operators who had sites visited as part of the week-long survey of the region.

Pulhams, Bourton-on-the-Water

Pulhams are an operator based in the Cotswolds and part of the larger Go-Ahead Group. They also operate bus services. At the time of visiting, the company was preparing to be part of a trial where coaches would be able to drop off passengers in Meadow Way nearby, before using the Pulhams depot to park. Key notes of the discussion with Pulhams are shown below:

Fleet and operations

- There has been lots of investment in both the coach and bus fleet since the acquisition in June 2023, also linked to PSVAR, and a view of improving the fleet generally
- Overall fleet size is 120 buses and coaches from the Bourton site, which has grown from around 94 vehicles since acquisition. There are also a further 20 buses following acquisition of Cheltenham based Swanbrook transport. Having the additional site in Cheltenham will be helpful for operations – our application to merge the licences of Swanbrook has now been completed, meaning Pulhams now have a fleet at approx. 150 vehicles.
- Main markets across bus and coach operations include local bus, home to school, private hire and tours and school sport
- Much of the home to school fleet is cascaded with newer vehicles used as part of other operations

Driver recruitment and retention

- This is generally not an issue, and there has been an increase of between 40-50 drivers which are a mix of existing license holders and new trainees
- With coach drivers, a barrier to entry is that schedules are only known 3 days in advance and this does not suit some people
- Go-Ahead are looking for a 50% female workforce across all roles by 2035. Pulhams currently is 17% female
- There is the potential for female driving instructors in the future which may help encourage more female drivers

Alternative fuels

- Pulhams acquired 15 electric buses using Zebra 2 government funding - due to arrive at the start of 2026
- However, for coaches, there is no clear preferred choice and very little infrastructure available to support low and zero emission coach transition. This is the case both for hydrogen and HVO.
- Pulhams would be willing to take part in trials depending on the scope of these but are unsure what type of work (e.g. home to school transport, tours etc) this would be best suited to

Location-specific issues

- There are significant issues in Bibury, with full size coaches being an issue similar to that observed in Bourton-on-the-Water. Stow-on-the-Wold and Moreton in Marsh are highlighted as much more welcoming to coaches in the wake of proposed coach bans in certain villages.
- Salisbury is a very good example of somewhere that has seen the value of coach visitors and seeing the benefits that can be brought in a more positive light, investing in a new coach parking facility

Bus specifications

- They work with several manufacturers, mostly Irizar, Plaxton and Mercedes across the coach fleet. Most recently they have acquired quite a few Irizar coaches but also have Plaxton, Volvo and Temsa coaches.
- All drivers can drive all vehicles
- They have a selection of vehicles in a higher spec interior, and spec all the interior of vehicles themselves
- There is a fluidity in ordering coaches with different numbers of seats to suit different briefs and markets
- There is no particular metric used to decide when vehicles are replaced. The operator has some 2008 plate vehicles in the fleet which are probably the oldest. Key factors include the residual values of coaches and availability of spare parts (Volvo are very good at parts supply). The most recent vehicle acquired is a 25 plate Temsa coach
- They don't always buy coaches new, with 4 second hand coaches recently bought. However, there are some restrictions on the types of vehicles that can be used for some contracts

TRO and local issues

- The uncertainty surrounding coach parking in Bourton-on-the-Water is producing animosity amongst local people, especially with coaches not turning around in good places within the vicinity of the village.
- Even prior to the official trial taking place, Pulham's have always offered their facility out as somewhere for coaches to park,
- The experimental TRO will be reviewed after 3 months. 15 coaches will be able to book onto the site at a rate of £15 per day
- The TRO has received lots of interest and media attention (Pulhams conducted interviews with both the BBC and ITV on the day that surveyors were visiting)
- A key factor will be coaches needing to turn up to the drop-off and pick-up zone on time otherwise coaches will be backed up and the trial unsuccessful
- Long term plan is to use land currently part of The Cotswold School as a parking area which will hopefully be a long-term measure



Figure 3-1 Coach leaving the Pulhams site

Table 3-1 Summary of issues identified in discussion with Pulhams

Type of Issue Identified	Details
Short Term (potentially alleviated by new TRO)	The uncertainty surrounding coach parking in Bourton-on-the-Water is producing animosity amongst local people, especially with coaches not turning around in good places within the vicinity of the village
Long Term	For coaches, there is no clear preferred choice and very little infrastructure available to support low and zero emission coach transition
Long Term	Significant issues in Bibury, with full size coaches an issue similar to in Bourton-on-the-Water.

Unnamed operator, Bath and North East Somerset region

AECOM also interviewed a smaller coach company based in North East Somerset. They are independently operated.

Fleet and operations

- This operator have a fleet size of 17 vehicles, and have 17 operating licences. All coaches are manufactured by Van Hool.
- The average fleet age is around 12 years old, the oldest being 25 years. There is no set plan for fleet turnover, and they just replace vehicles when it needs to be done
- They have one 60-seater, one minibus and 2 coaches in luxury specification for sports teams for both football and rugby. The rest are all 53 seaters in standard specification.

Driver recruitment and retention

- This was as an issue after covid regarding drivers coming back initially, but not so much now
- The company both trains their own drivers and recruits qualified, experienced drivers from outside
- Nothing specific is being done by them with under-represented groups and trying to get them into the sector, but they are a relatively small company

Alternative fuels

- With electric coaches, the company are looking to wait until the vehicle range has increased to determine if this would be sufficient for the type of services they typically provide
- They think that hydrogen will turn out to be the 'best' alternative fuel but it is currently too early to tell
- They say that using Biodiesel causes engine issues for their coaches

Location-specific issues

- There is a big issue regarding parking in London for independent operators – often there is nowhere to go and issues complying with drivers hours

- Heathrow is the best airport to pick up and drop off, although there are issues with getting around the site.
- A big issue is vandalism of coaches by children when riding on them, for example cutting seatbelts off and slashing seats

Markets

- The company also operates away travel coaches for local football and rugby clubs. They run 1 supporters coach for the football team, and between 1 and 4 for the rugby team each match.
- Cruise ships are one of the main markets, running services picking up passengers at various points in Wales and dropping them at Southampton for Intercruises Shoreside and Port Services, who are part of Tui. This can be as many as 12 vehicles on a Saturday. However, there is an issue with late running ferries impacting drivers hours
- Education is another big market for the operator, including university coaches and sports coaches serving the local area
- The operator no longer does as many scheduled tours abroad following Brexit. They do, however, facilitate tours coming in to the UK from abroad, for example groups from Austria
- The market for older customers has reduced as visitors in this age group seem to have become more car orientated. These groups used to be more reliant on day trips using coaches but not any more
- Also, for schools an issue is parents no longer being able to afford to send their children on coach trips due to increased costs and financial pressures
- The company are not especially interested in running scheduled services – they got approached for first FlixBus route in UK but turned down the opportunity to run it
- PSVAR is very expensive to implement and the operator currently has 2 vehicles which they use on 2 particular routes
- Some cruise coaches also require lift access. There are also 2 other routes that are currently under BODS legislation. This is the Bus Open Data Service, where bus operators are required to provide open timetable, fare and real-time vehicle location data
- Overall, the company say that they are in a fortunate position that they can ‘pick and choose’ the work that they do that best suits them and their drivers
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Table 3-2 Summary of issues identified in discussion with the unnamed operator

Type of Issue Identified	Details
Short Term	Vandalism of coaches by children when riding on them, for example cutting seatbelts off and slashing seats
Long Term	Biodiesel causes engine issues for their coaches
Long Term	They are not currently sure what the best alternative fuel will be for their coaches
Long Term	Big issue regarding parking in London for independent operators
Long Term	For schools an issue is parents no longer being able to afford to send their children on coach trips due to increased costs and financial pressures
Long Term	PSVAR is very expensive to implement

Centurion, Midsomer Norton

Centurion are an independent operator based in Midsomer Norton in North East Somerset. Surveyors spoke with the Director as well as three drivers about their experiences as well as viewing a number of vehicles as part of a depot tour.

Fleet and operations

- They have 28 operator licenses and 26 vehicles, with 3 minibuses. The newest vehicle in the fleet is a 25 plate Irizar being delivered that day, oldest is a 04 plate vehicle being used for school routes
- They have a variety of coaches in different specifications for different markets

Route into Industry for drivers

- One driver had done lots of driving and became a coach driver when other business ventures did not go to plan
- One driver who has been driving for 44 years including 7 with Centurion originally wanted to be a mechanic, then did some minibus driving and enjoyed it so started with coaches
- A younger driver who has been driving for 2 years approached Centurion and did their license with the company. There is the potential for better qualifications. The only real option is doing CPC (Certificate of Professional Competence)
- Another issue is people having to be 19+ to access Educational Skills funding
- Also with courses, it would be good to have courses where if you leave the industry you do not have to pay back the money so people can try the industry out
- For older drivers, the onset of greater regulation and restriction is seen as an aspect that has made driving coaches seem more negative. But for younger drivers, that is all they have ever known, and therefore it may be more helpful for them entering the industry
- There is only 1 female driver at Centurion. They have had no applications from females in 3 years. Possibly there is still a perception of the industry that discourages applications from women

Issues faced by drivers

- Lack of toilets is a big issue. Bristol was noted as a key area where this is a particular problem, even though there is paid parking available there is a lack of facilities. Salisbury does have toilets but these need to be paid for.
- For Christmas markets in Bath, people fill the area so it is very difficult to find parking. This involves coach parking being taken over, with no allowance for everyday coach operators. Bath are more friendly for dropping off and picking up locals, though there still is not any proper provision.
- If there is any reason why normal parking should not be available there needs to be as temporary solution for coach drivers
- They try to avoid Bourton-on-the-Water as there is not anywhere to park and if there are the spaces are taken up by cars
- In London, coach parking is often filled up by film crews. Feeling that coach parking is cut out and never replaced
- Bath does not aid coach transport and systems in place are not good enough. Restrictions in place are causing obstacles to the industry
- Wells coach park is a good example – they have contactless 20p machines for toilets

- Some drivers do not drink enough water as they cannot reliably go to the toilet which is not good for their health and hydration

Positive aspects of being a coach driver

- The coach sector is a welcoming industry, and if any problems are encountered out on the road, you will be helped
- Overall good job satisfaction – it is good to wake up and enjoy your work
- Good to get to promote the brand
- Good to help disabled/young/vulnerable passengers
- Great to get good feedback, especially clients singling out drivers that they want to have again in the future
- Good working relationship with other coach companies. Helping each other out during busy periods. Particularly the case with local independent operators



Figure 3-2 Interior of 2023 Temsa coach

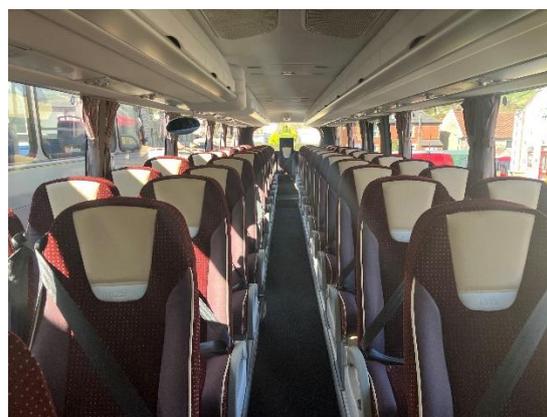


Figure 3-3 Interior of 2025 Irizar i6 coach



Figure 3-4 Surveyors with three drivers from Centurion



Figure 3-5 Surveyors with Steve Spiller, Director from Centurion, in front of two new vehicles

Table 3-3 Summary of issues identified in discussion with Centurion

Type of Issue Identified	Details
Short term (potentially alleviated by new TRO)	Lack of available parking in Bourton-on-the-Water
Long Term	Lack of suitable qualifications available for potential drivers
Long Term	Requirement to be 19+ to access educational skills funding
Long Term	Requirement for potential drivers to have to pay back money if they leave the industry
Long Term	Still potentially a perception of the industry that discourages applications from prospective female drivers
Long Term	Lack of toilets, especially in areas such as Bristol
Long Term	For Christmas markets in Bristol, people fill the area so it is very difficult to find parking
Long Term	If there is any reason why normal parking should not be available there is often no temporary solution for coach drivers
Long Term	In London, coach parking is often filled up by film crews
Long Term	Bath does not aid coach transport and systems in place are not good enough. Restrictions in place are causing obstacles to the industry
Long Term	Some drivers do not drink enough water as they cannot reliably go to the toilet which is not good for their health and hydration

Excelsior Coaches, Pimperne

Excelsior are a Dorset-based operator who, like Pulhams, are owned by Go-Ahead. They previously operated routes for National Express, and soon will be responsible for running the new FlixBus service between Poole and London. Excelsior also previously took over Damory who run school bus and coach services.

Fleet and Operations

- Across Excelsior and Damory there are 91 buses and coaches
- 2 Excelsior coaches are based in Bournemouth, 2 in Poole, 2 in Dorchester and 6 in Pimperne
- 3 FlixBus branded Temsa coaches will be based in Poole (these were being delivered on the day that surveyors were visiting the Pimperne site)
- FlixBus operation will be 4 services a day initially then increasing to 6. Attraction of FlixBus is as “a tech company that sells seats” which leaves the coach company to focus on what they are good at (running coaches)

- Latest acquisitions are Volvo and Yutong coaches. They tend to mostly go for a mid-range specification. Yutong provide great customer service.
- They always buy new and often cascade into school fleets
- The oldest coach was 25 years old but left the day before surveyors arrived. Now the oldest coach in the fleet is 15 years old. The newest coaches are four 24 plate Volvos

Driver recruitment and retention

- Retention is an issue more for bus driving operations, whereas the pool of drivers of coaches is more stable
- When Seaview coaches closed, many drivers came over to Excelsior
- They are a big company so offer the flexibility to give drivers the sort of work that suits them best
- Being able to park at Go Ahead in London is very valuable. This offers engineers, fuel and cleaning facilities
- Food and facilities are good at Go-Ahead sites and this helps to make planning and logistics easier

Markets

- There is a large Damory operation at Portland Port – 12 ‘Port Deckers’ providing services there, which are double-decker buses specifically used for port operations. They have dedicated drivers for the port work (Note from Dorset Council that the market at Portland Port is now seasonal for the cruise ships).
- Between Excelsior coaches and Damory, the company operates coach hire/tours as well as school coaches and hire
- They also run rail replacement services, such as on the Weymouth-Southampton route
- They also manage European Union element of Go South Coast, which involves overseeing European operations as part of the wider group
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Figure 3-6 Interior of a coach used primarily for school services with 2x3 seating



Figure 3-7 Interior of a standard-specification coach used for general hire and groups



Figure 3-8 Selection of coaches at Excelsior's Pimperne site



Figure 3-9 Surveyor with Paul Knight, Coaching Unit Operations Manager from Excelsior

Table 3-4 Summary of issues identified in discussion with Excelsior

Type of Issue Identified	Details
Long Term	While the pool of coach drivers is more stable, retention is an issue for bus driving operations

4. Conclusion

Overall, the week-long period of surveys was successful in gaining a greater understanding of the nature of coach operations in the areas of the Western Gateway STB region that was visited.

The key observations and issues identified during the surveys are summarised under three main topic areas: Parking Infrastructure, Passenger Experience, and Industry and Drivers

Parking infrastructure

There are different areas that are seen as positive or negative with regards to drop-off and parking provision, however Bourton-on-the-Water and Bibury were highlighted as areas that drivers noted particular issues with (and both locations have drawn significant interest in local and national press).

Salisbury and Poole were examples of areas visited by surveyors that generally got a positive reaction from drivers. However, drivers also noted positive aspects such that it was a welcoming industry, and one that (despite the aforementioned issues) did provide job satisfaction.

There was a consistent issue observed with other types of vehicles being parked in spaces clearly signposted or marked as being intended for coaches, and it appeared that this was not being enforced. This may be a particular issue for coach parking, as coaches may not visit the parking locations regularly, and could be quite seasonal, therefore creating periods of time when the parking locations are lightly used, and this may encourage other vehicles to be parked there.

Passenger experience

Passengers using coaches consistently noted the convenience and cost-effectiveness that coach offers over other modes such as driving and using the train.

Coaches were being used by a variety of groups including older people, families and friends for a variety of purposes and passengers gave overall a positive experience.

Key improvements that passengers were looking for included increased opening hours for facilities like toilets and more opportunities to get food and drink at stops/interchanges.

The quality of coach stops and coach parks vary significantly across the region with some having facilities like toilets available and some not. Sites in general appeared clean and well-maintained, despite some sites needing improvements like information posters replacing.

Coach industry and drivers

There is a clear lack of toilet facilities available for coach drivers within the region, and this is a key issue for drivers both within the industry and a potential barrier for new entrants.

Operators provided a lot of information and were clearly proud of the roles they play and the services they provide.

There is a wide variety of work that coach operators do, and there is generally good co-operation with other firms.

Business is generally going well for the operators engaged with, and for some operators they are able to 'pick and choose' the type of work that best suits their companies.

For those part of larger operators like Go-Ahead, this offers great opportunities to use facilities at Go-Ahead sites which independent operators do not have access to, both in the south west and in cities like London. On the other hand, those that are not owned by a group with premises in London struggle to find parking when visiting.

In addition, while some firms are making efforts to recruit from under-represented groups including female drivers, there still appear to be barriers for female drivers applying for coach driving roles or

that the operators do not receive many applications or interest from potential female drivers. This may potentially be because there is still a perception of the industry that discourages applications from prospective female drivers, and there is more work to do in this area.

Summary of location-specific issues

Table 4-1 shows a summary of timescales, issues and locations that are covered in section 2. Where similar issues have been found at multiple locations, these have been combined into one row with all the locations that they were observed at.

Table 4-1 Summary table of issues from location-specific analysis

Timeframe	Broad Issue	Responsible Parties	Locations
Short Term (potentially alleviated by new TRO)	Operators no longer visiting Bourton-on-the-Water due to lack of available parking	Local Authority	Bourton-on-the-Water
Short Term (potentially alleviated by new TRO)	Minibuses picking up/dropping off on double yellow lines	Minibus Operators	Bourton-on-the-Water
Short Term (potentially alleviated by new TRO)	Coaches seen parking in industrial parks	Coach Operators Local Authority	Bourton-on-the-Water
Short Term (unless is a wider issue)	Due to 'ticketing systems upgrade works' tickets could not be bought from the driver for National Express services	National Express	Cirencester
Short Term	Lines marking coach bays are faded	Local Authority Coach Park Operator	Bibury Shaftesbury Corfe (Purbeck Park) Bournemouth (Kings Park) Lulworth Cove
Short Term	Megabus posters/flags still in position despite services no longer stopping	Megabus Local Authority	Cirencester Poole (Seldown)
Short Term	Very worn, scratched and peeling information posters at National Express stops	National Express	Stroud
Short Term	Path from parking area to facilities is worn and uneven in places	Longleat	Longleat
Short Term	Lack of timetables/QR codes at National Express pick-up and drop/off	National Express	Salisbury
Short Term	New signage would be good, especially for foreign drivers, according to one driver	Coach Park Operator	Salisbury

Short Term	Bus parked at an angle across coach parking bays	Bus Operator	Shaftesbury
Short Term	The lift linking Bournemouth Pavilion with the lower gardens was broken	Lift Operator	Bournemouth
Short Term	Litter in the parking area at Queens Road	Coach Park Operator Local Authority	Bournemouth
Short Term	'Buses/Bus Stop' painted on pick-up/drop-off areas, rather than 'Coaches'	Local Authority	Swanage (Gilbert Road) Bournemouth (Pavilion) Bournemouth (International Centre) Christchurch (Wick Lane)
Short Term	No current provision for coaches (but this is planned in the future as part of the planned redevelopment and expansion of the airport passenger terminal facilities)	Coach Park Operator	Bournemouth Airport
Medium Term	Other vehicles parked in coach bays with a lack of enforcement	Coach Park Operator	Bibury Stroud (Stratford Road) Corfe (Purbeck Park) Christchurch (Drop-off outside Civic Centre)
Medium Term	Toilets/shops were closed on visit date	Local Authority Coach Park Operator	Cirencester (toilets) Stonehenge (small shop)
Medium Term	Potholes/uneven surface within the parking area	Coach Park Operator	Shaftesbury Bournemouth (Kings Park) Swanage (North Beach) Lulworth Cove
Long Term	Lack of coach parking available in the village and manoeuvrability in tight areas (causing some companies to switch to using minibuses)	Local Authority	Bourton-on-the-Water
Long Term	Displacement of on-street parking for cars once the drop-off bay is implemented on Meadow Way	Local Authority	Bourton-on-the-Water
Long Term	Issues with picking up/dropping off with cars double parked	Coach Operators	Bibury

Long Term	Issues with coaches navigating the village due to narrow streets and parked cars	Local Authority Coach Operators	Bibury
Long Term	Lack of shelters available at National Express pick-up/drop-off	National Express	Salisbury Cirencester (London-bound side)
Long Term	No crossing at the coach stop without taking a detour	Local Authority	Cirencester
Long Term	Coaches, anecdotally, struggle to turn around in Cirencester which can cause traffic disruption	Local Authority Operators	Cirencester
Long Term	Site is a significant distance from Bath City Centre	Local Authority	Bath (Odd Down Park and Ride)
Long Term	Perceived lack of food and drink options available at the coach parking site	Coach Park Operator	Stonehenge Bournemouth (coach station)
Long Term	New parking area is a "bit of a walk" to facilities according to one driver	Local Authority	Salisbury
Long Term	Lack of designated walkway from the parking area to the toilet block that is wide enough for those with accessibility needs	Coach Park Operator	Shaftesbury
Long Term	Passengers with accessibility needs in a coach parked in the easternmost coach parking bay may struggle if a coach is already parked in the westernmost bay	Coach Park Operator	Shaftesbury
Long Term	Very little space for coaches to manoeuvre at the Corfe Castle National Trust parking site	Coach Park Operator	Corfe
Long Term	Very high parking charges for coaches	Coach Park Operator	Lulworth Cove
Long Term	Some passengers wanted toilets available at pick-up points and shelters available for if it was raining	Coach Park Operator	Bovington Tank Museum/Monkey World
Long Term	Lack of facilities available	Coach Park Operator Local Authority	Poole (For National Express drivers) Bournemouth (Kings Park) Bournemouth (Queens Road) Christchurch (Riversmeet Centre) Poole Stadium (when stadium is closed)

Long Term	Toilet opening hours at Bournemouth Coach Station seemed very restrictive (8am-5pm) and was backed up by passengers	Coach Park Operator	Bournemouth
Long Term	Lack of coach parking spaces at Queens Road	Coach Park Operator	Bournemouth

