Peninsula Transport Coach Action Plan
Accessibility Gap Analysis

November 2025

Prepared by

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Executive Summary

Purpose

The purpose of this report is to deliver an **Accessibility Gap Analysis** for the Peninsula Transport region following adoption of its first **Coach Action Plan**. It aims to identify gaps in l**ong-distance public transport provision** and explore cost-effective, flexible solutions to improve connectivity across Cornwall, Devon, Somerset, Plymouth and Torbay.

This includes assessing current network limitations, understanding demand drivers (tourism, demographics and travel flows) and recommending practical interventions such as third-party bus connections, strategic network development and improved airport access to support the vision of **"A Connected Peninsula."**

Methodology

The Accessibility Gap Analysis draws on multiple data sources—including tourist flows, the existing regional transport offer and stakeholder input. BT Mobile Data was later used to validate initial findings, strengthen the evidence base and reveal additional gaps not identified through demographic analysis. An optioneering exercise then identified existing bus routes that could be integrated into the coach network to enable broader travel using a single through-ticket.

This analysis supports ongoing work on cross-boundary bus integration by identifying opportunities to better align coordinated, multi-operator ticketing and service information across the Peninsula Transport area. Well-integrated, visible, and accessible public transport that is easy for communities to understand delivers the greatest benefits. For coach services to compete effectively with long-distance rail, they must operate via the most direct routes and avoid unnecessary journey-time penalties for longer-distance passengers.

Opportunities Identified

- Introduce **Third-Party Bus Connections** to integrate towns like Ilfracombe, Sidmouth, Brixham and Frome into the coach network via through-ticketing.

- Explore **new direct coach routes**, notably **North Devon–Bristol Airport** and consider "Park & Fly" options at strategic sites.

- Develop a **Strategic Bus and Coach Network** to complement rail and improve regional mobility.

The Existing Situation

Gaps in the Network

The current coach network largely serves towns and cities along the **M5 and A38 corridor** from the region's northern boundary through Exeter, Plymouth and into Bodmin, with additional links into Torbay and South Devon. Services then continue along the **A30** into Cornwall, including the northern route via Okehampton and Launceston. However, the withdrawal of the National Express 503 service (Penzance–London) has left several A30 corridor towns without scheduled coach services. As a result, Barnstaple, Bideford and Newquay are now the only northern locations with coach provision.

Coastal towns receive limited services due to their distance from the strategic road network, a challenge also faced by parts of East Devon (e.g., Honiton, Sidmouth) and Somerset (e.g., Frome). Torbay is less affected, with regular services reaching Torquay and Paignton.

The current extent of the coach network in the region is shown in **Figure 0-2**.

Figure 0-2 – Current Coach Network in the Peninsula Region
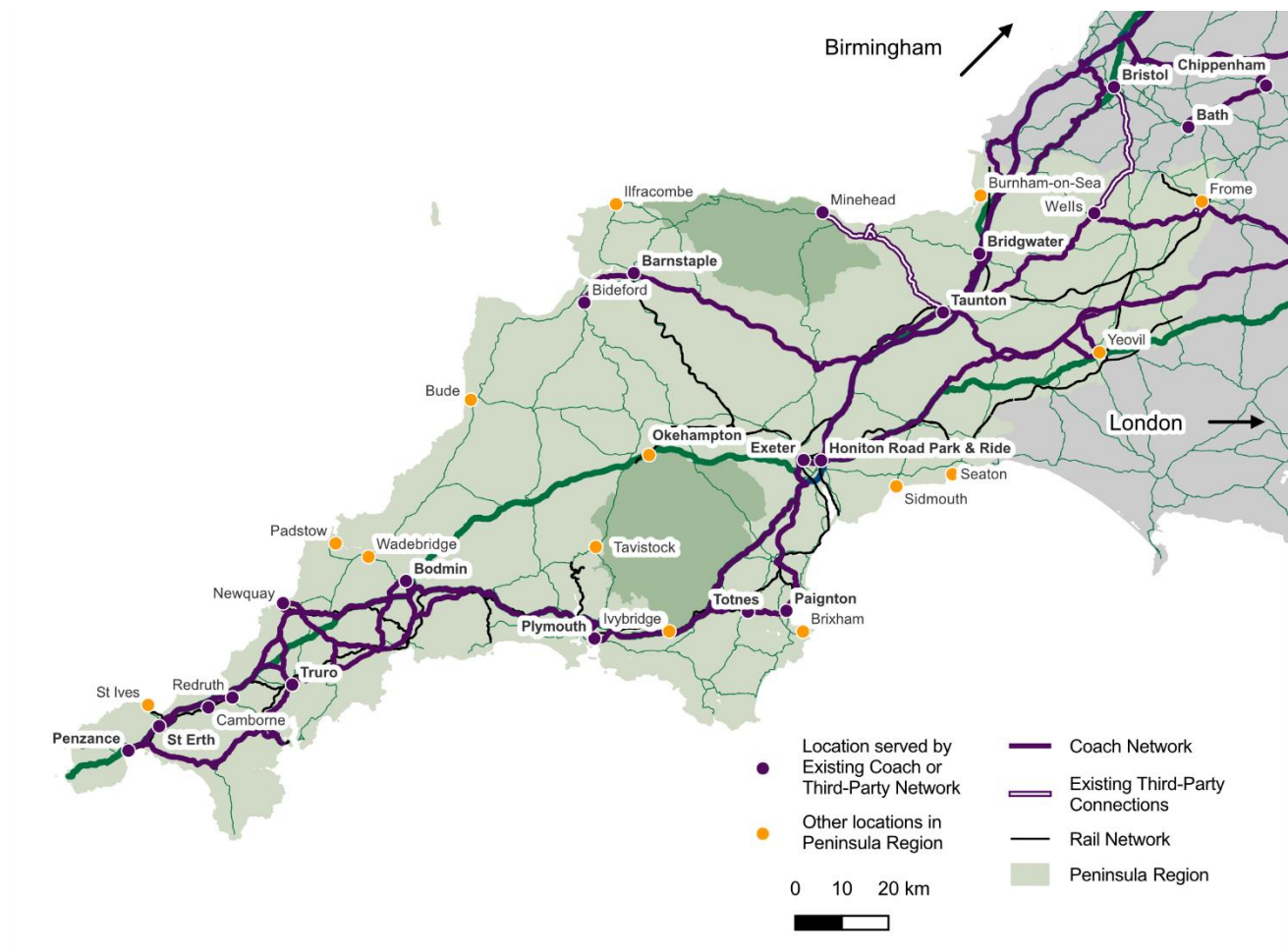
Based on reviewing the network, it has been possible to identify a series of key locations either unserved or poorly served by the existing coach and rail network, but where there could be opportunities to create better connections shown in **Figure 5-1.**

Figure 5-1 – Suggested opportunities for improved connections in the Peninsula Region
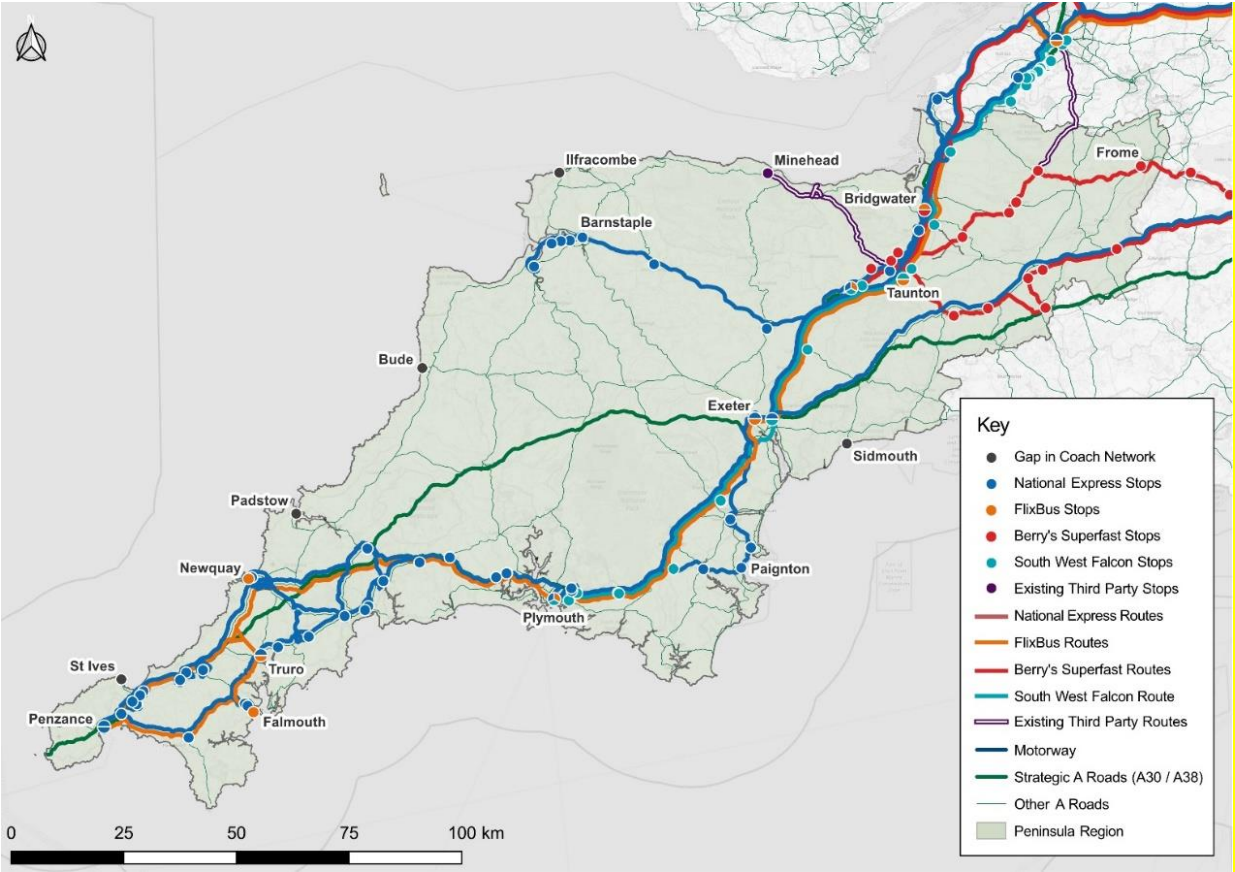
Recent and Upcoming Developments

Recent upgrades to the northern A30 through Devon and Cornwall, including dualling to Penzance, provide opportunities for faster coach services and improved interchange with potential feeder routes serving towns in north Devon and north Cornwall. Enhancements to the St Erth Multi-Modal Hub also create benefits for coach users, enabling direct access to the railway station and smoother connections to St Ives.

In addition, planned improvements at several regional transport hubs (e.g., Taunton) present further opportunities to strengthen multimodal interchange. Ensuring coach provision is considered at the planning stage will be key to improving regional connectivity.

Local Demand for Coach – Understanding Demographics

Demographic analysis—covering age, gender, deprivation, car ownership and access to rail stations—provided insight into travel needs across the peninsula.

Findings indicate a higher likelihood of coach use in certain areas: **25% of the regional population is aged over 65** and **car ownership is low** in several **urban centres**, with fewer than 50% of households owning a car in parts of Exeter, Torbay, and Plymouth.

Engagement with operators confirmed these groups as key potential coach users. As the population ages, improving coach accessibility will be increasingly important to supporting future demand and the growth of the industry, including improvements to first and last mile accessibility to the network.

It is also important to recognise that **women's transport needs** differ from men's, including greater personal safety concerns and a higher likelihood of travelling with dependents. Safe, well-lit waiting areas, CCTV, Help and Information Points and Real-Time Information are therefore key to making coach travel more attractive.

Tourist Demand for Coach – Understanding Flows

Traffic flows, rail and airport passenger data were analysed for July (representative of the peak tourist season) and as averages for the entire year using a range of sources.

The most notable increases in tourist flows are on the following routes:

- **M5 / A38 between Bristol, Exeter and Plymouth**
- **A30 through Devon and Cornwall**
- **A303 in Somerset**; and
- **A361 between Barnstaple and Tiverton**

Increased vehicle flows have been observed throughout much of Devon, as well as main routes in Cornwall and Somerset, indicating that the whole region experiences **an increase in traffic flows during the summer period**.

Frequent rail services provide strong connections in the south, particularly along the Great Western and Cornish Main Lines, though **North Devon**, **North Cornwall** and **West Somerset** remain **less**

accessible. Exeter and Newquay Airports serve regional air travel, with Bristol International Airport also within the wider catchment.

Although coach services operate commercially, they require lower capital investment and offer greater flexibility. Expanding coach connections to currently underserved areas could address **seasonal demand fluctuations** and increase public transport usage.

BT Mobile Data – Understanding End-to-End Journeys

To support the findings from road, rail and air movements, BT Mobile Data was used to consider existing end-to-end road journey flows between the Peninsula and a range of locations around the country. Most of these journeys are presumed to be by private car, reflecting the limited share of coach travel. A series of six destinations were selected to understand movements to key areas outside of the Peninsula region, including: Greater London, Birmingham (and surrounding areas), Bristol (including Bristol International Airport), Heathrow and Gatwick Airports.

The most **significant average daily flows** observed across the region are to **Bristol and Greater London**. The key locations identified were selected based on a combination of major cities that can be easily reached by coach from the Peninsula, as well as locations where passengers can interchange onto other parts of the coach network to continue onward journeys.

Stakeholder Engagement – Understanding Operators' Needs

Engagement sessions were offered to the region's scheduled express operators, to supplement the desktop review. This included meetings with FlixBus, Berry's and Stagecoach South West (operator of the Falcon service) to understand:

- Their plans for changes to the existing network;
- Whether they would be open to exploring third-party connections; and
- Opportunities for regional or county-wide links that do not currently exist, but where a service may be viable.

Engagement sessions indicated that the coach network generally **aligns with current demand**, with low demand or the presence of alternative transport options (such as frequent rail services) affecting service viability. However, all operators expressed openness to third-party connections to enhance their existing networks.

Discussions with Bristol Airport explored potential opportunities to enhance coach connections to the airport. As a next step, it would be beneficial to undertake the following:

- Further engagement with bus and coach operators to discuss developments to the network, including additional third-party connections;

- Discussions with the rail industry to help develop an integrated network between bus, coach and rail in the region. This would help to create a strategic transport network; and

- Further engagement with wider stakeholders, including Bristol Airport, Member Authorities and Town Councils to ensure continued support and opportunities to develop the network.

Summary of Gaps in the Network

A summary of the key gaps in the network where there may be opportunities to make improvements to provision are listed in **Table 0-1**. The key priority locations referenced below are indicated in **Figure 0-4**.

Table 0-1 – Summary of improvement opportunities identified

Location	Key Justifications for Improvement
Bude, Cornwall	• No access currently to long-distance transport services, with poor bus connectivity from the town. • Like other areas of North Cornwall, Bude experiences an increase in traffic flows during the peak tourist season. • Comparatively high proportions of households without access to a private car.
Padstow, Cornwall	• Higher than typical average daily road trips to Greater London (based on BT Mobile Data).
Wadebridge, Cornwall	• Higher than typical average daily road trips to Greater London (based on BT Mobile Data).
St Ives, Cornwall	• Higher than typical average daily road trips to Greater London (based on BT Mobile Data).
Ilfracombe, Devon	• Regular bus connections to Barnstaple, therefore links to existing rail and coach networks. • Increased traffic flows during the peak tourist season between Barnstaple and Ilfracombe. • Higher than typical average daily road trips to Greater London in area between Barnstaple and Ilfracombe (based on BT Mobile Data). • Higher than average proportion of households lacking access to private car. • Higher than average levels of economic deprivation.
Sidmouth, Devon	• Regular bus connections to Exeter and Honiton Road Park & Ride, therefore links to existing coach and rail network. • Slightly increased traffic flows in surrounding area during the peak tourist season. • High proportion of population aged 65+. • Higher than typical proportion of households lacking access to private car.
Tavistock, Devon	• Regular bus connections to Plymouth, with links to existing coach network.
Brixham, Devon	• Regular bus connections to Paignton, with links to existing coach network. • Increases in traffic flows during the peak tourist season. • High proportion of population aged 65+.
Frome, Somerset	• Regular bus connections to Bath and Chippenham, linking to additional (more frequent) coach services. • Higher than typical proportion of households lacking access to private car.

Optioneering Exercise

An optioneering exercise was carried out to consider the provision of existing services across the region that could offer a single, high-quality connection to the existing coach network. Although the exercise focused on the towns identified in **Table 0-1**, the whole region was considered for completeness.

Identifying Additional Third-Party Connections

Third-party connections enable passengers to reach destinations not directly served by coaches using a **single ticket**. Coaches link with existing local and inter-urban bus networks, allowing passengers to continue their journey on a connecting service. The local bus operator is reimbursed a portion of the coach ticket fare.

The third-party connection between **Minehead and Taunton** via the First Bus 28 service demonstrates how such links can expand coverage and access to the coach network. Given that coach services operate commercially without government funding, increasing third-party connections is the most feasible, cost-effective and flexible way to improve accessibility.

The results of the gap analysis and optioneering exercise highlighted several bus routes that could be added to the coach network as 'Third-Party Connections' (**Figure 0-4**). All routes identified scored favourably and would be recommended for inclusion as part of the existing coach network (shown in **Figure 0-2** (Page 8)).

BT Mobile Data can help identify journey flows and inform the prioritisation of new connections. The optioneering process identified that adding third-party connections to **Brixham**[1], **Bideford** and **Ilfracombe** represent a potential 'quick win' for the region.

By contrast, **Bude** faces greater challenges in connecting to the coach network following the withdrawal of its direct bus service to Plymouth in April 2025. While Stagecoach South West's service 6 links Bude to Okehampton Railway Station, it operates only five return journeys per day on Mondays to Saturdays and three on Sundays, making it considerably less frequent than the routes considered in the optioneering exercise. Nonetheless, this service has been integrated with the rail network, offering through connections via Okehampton. The proposed connections are shown in **Figure 0-4**.

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[1] The work currently being undertaken by Torbay Council and GWR to support connecting Brixham to the rail network is relevant here. Local bus connections to/from Brixham are being highlighted at Paignton Station, and plans are in place to wrap a bus shelter in Brixham to highlight the connection.

Figure 0-4 – Proposed Third-Party Connections for the Peninsula Region

Table 8-5 – Services considered as part of the Optioneering process

Service	Operator	Connection at	Third-Party Service Destination(s)
21B	Stagecoach South West	Barnstaple (Devon)	Braunton; Ilfracombe
21 / 21A	Stagecoach South West	Ilfracombe (Devon)	Bideford; Westward Ho! (21); Appledore (21A)
12	Stagecoach South West	Paignton (Torbay)	Brixham
T1 / T2 (Tinner)	First Kernow	Truro (Cornwall)	Redruth, Camborne
GOLD	Stagecoach South West	Plymouth / Marley Head / Totnes (Devon)	Ivybridge
21 / 21A	First Buses of Somerset	Bridgwater (Somerset)	Burnham-on-Sea
17A	First Kernow	Penzance / St Erth (Cornwall)	St Ives
D2 / D2x	First Bath, Bristol and The West	Bath	Frome (Somerset)
9 / 9A	Stagecoach South West	Exeter / Honiton Road Park & Ride (Devon)	Sidmouth, Seaton
X34	Faresaver	Chippenham (Wiltshire)	Frome (Somerset), *Potential to consider Trowbridge and Melksham (Wiltshire, and therefore outside Peninsula Region)*
11	Go Cornwall Bus	Bodmin (Cornwall)	Padstow (Cornwall), Wadebridge (Cornwall)
54	First Buses of Somerset	Taunton (Somerset)	Somerton (Somerset), Yeovil (Somerset)

Key Considerations

A summary of the key considerations that should be taken forward are shown in **Table 0-3**. Some of these have already been included within the scoring process undertaken to identify the most suitable connections.

Table 0-3 – Key Considerations for Coach Connections

Consideration	Reason	Included within Scoring
Waiting Times / Frequency of Service	Seamless connections between bus, coach, and rail, would help to support 'Easier Journeys'. Where third-party services are more frequent, the resilience of connections can be improved, in case of delays to coach services feeding into these third-party connections.	Frequency and availability of service has been scored.
Facilities	Opportunities to improve passenger experience, promote services, as well as enhance actual and perceived safety and security. Though not scored, this could also consider the connecting vehicles themselves and ensuring facilities (e.g. luggage racks) are provided for long distance passengers. *As a result, these elements should form a key part of any discussions between operators, and local authorities as necessary, when developing third-party connections. This focus would ensure these aspects of the passenger experience are considered fully and any potential concerns addressed.*	Yes, current and potential work required has been scored.
Ticketing	Opportunities to develop unified ticketing solutions would align with Peninsula Transport's Strategy, as well as offer a single, unified solution for the benefit of drivers and passengers.	No

Future Opportunities for a Strategic Transport Network

Many of the routes identified for third-party connections could form a wider Strategic Bus and Coach Network, improving longer-distance connectivity for towns and cities with limited options. These initial connections could be expanded over time to create direct, strategic links along key corridors and complement the existing rail network by filling gaps between population centres. A similar approach is demonstrated by the TrawsCymru network in Wales, which was designed to complement rail and provide faster strategic services.

Next Steps

A range of next steps has been identified to support development of the regional coach network in line with the Peninsula Coach Action Plan. These actions are listed in **Table 0-4**, and highlight Peninsula Transport's likely role in implementing these actions[2].

Table 0-4 – Next Steps

Theme	Action	Peninsula Transport STB Role	Timescale	Cost
Improved Connections / Supporting the Passenger Experience	Work with operators and other stakeholders to implement additional 'Third-Party Connections', providing better access to several towns across the Peninsula Region identified as 'Priorities for Improvement'.	Facilitator	Short-Medium Term	££
Improved Connections	Further understand key road traffic flows to, from, and within the Peninsula Region. From this, determine the parameters for a possible 'Strategic Bus and Coach Network', drawing upon lessons learned from other regions (including TrawsCymru in Wales).	Researcher	Short Term	£
Improved Connections	Support and work alongside stakeholders to implement new services, particularly a potential North Devon to Bristol Airport coach link.	Influencer / Facilitator	Medium Term	££
Supporting the Passenger Experience	Support and work alongside stakeholders to improve passenger facilities across the region at key interchange points to/from potential 'Third-Party Connections'	Influencer	Medium-Long Term	£££
Supporting the Passenger Experience	Understand passenger experiences and perceptions of coach, including gaining insights from users and non-users of the network to identify opportunities to remove or minimise barriers to travel by coach.	Researcher	Short Term	££

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[2] Roles follow the approach referred to in the Peninsula Coach Action Plan – "Researcher", "Influencer", and "Facilitator"

1. Introduction

Peninsula Transport is one of seven Sub-national Transport Bodies (STBs) within England, covering the five local transport authorities: Cornwall Council, Devon County Council, Somerset Council, Plymouth City Council and Torbay Council. It also engages with co-opted members including the Department for Transport, Network Rail and National Highways.

Since adopting the Peninsula's first **Coach Action Plan**[3], WSP have been supporting Peninsula Transport in implementing the four quick wins identified within the plan. These are to:

- Introduce a Regional Coach Forum;

- Introduce an Information Portal for Operators;

- Carry out a network accessibility gap analysis; and

- Identify and achieve 'Coach Friendly' status for up to five locations per year through the Confederation of Passenger Transport's (CPT) accreditation scheme.

1.1 Overview

Coach network analysis conducted during the development of the Coach Action Plan highlighted that areas within **North Cornwall** and **North Devon** lack longer distance public transport provision and direct connections to major locations across the UK. While a few locations, such as Barnstaple, have direct coach connections to major cities, many key destinations within these areas and across the wider region have limited access to such services. These locations instead depend on existing rail links or local bus routes to reach towns that provide scheduled coach connections. At present only one bus connection is formally part of a connected coach journey (the FirstBus Service 28 between Taunton and Minehead) and all other bus connections must be found by the passenger and cannot form part of a through ticket journey approach.

The **purpose** of this technical report is to detail the further work that has been carried out to validate this current position, confirming where the **current gaps in the coach network are** and to **identify where access could be improved** based on potential demand using **third-party bus connections**. The work will draw up an extensive list of locations that would benefit from coach network access and identify solutions that could be explored further to improve accessibility.

1.2 Current Barriers to Coach

The "Getting to and from the Airport" report, jointly commissioned by Heathrow Airport, the Department for Transport and Transport Focus[4] notes that when survey participants were asked about their perceptions of coach travel, a large proportion were unable to either agree or disagree with the statements provided in the questionnaire. As the survey statements were generally direct and easy to understand, respondents' inability to form an opinion suggests a limited awareness or understanding of

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[3] Source: Peninsula Transport Coach Action Plan
[4] Source: Transport Focus - Getting to and from the Airport. Is coach an option?

coach travel. Given that the survey covered participants from across England, it is reasonable to assume that the findings are also relevant to potential users within the Peninsula region.

The report also suggests that to increase coach usage, services should be tailored to meet users' needs, travel information should be communicated more effectively and passengers should receive greater reassurance on the reliability of coach travel. While regular coach users did not report confusion or problems with coach travel, the report mentioned that there is usually a poor match between the strengths of coaches and the key priorities of the non-coach users.

The priorities of the non-coach users mostly revolved around the convenience of travelling as and when required along with the confidence of reaching the destinations on time. While 59% of the respondents had felt that the coaches are often delayed by traffic or roadworks, 51% of the respondents perceived coach services to be too infrequent which partly led to the low conversion rate of new coach users. In comparison to the other modes, the coach users are less satisfied with punctuality and flexibility of coach travel and primarily choose coach as an option due its low price point as compared to the other modes. However, the opportunity cost of the potential users to use their journey time constructively while travelling on coaches in comparison to the other modes, especially cars, could potentially lead to users opting for coaches if suitable and attractive coach options are provided.

Consequently, key factors that can help to improve the passenger experience include:

- The quality of coach facilities
- Schedules
- Real-Time Information
- Punctuality; and
- Vehicles

1.3 Methodology

To analyse the region's coach offer and identify connectivity improvements, the following methodology has been adopted. The aim of adopting this approach is to explore and highlight a variety of reasons for enhancing the current coach offer. **Figure 1-1** summarises the adopted methodology for understanding the gaps in the current coach network.

Figure 1-1 – Adopted Methodology for Understanding Gaps in the Network

| Current Transport Offer in Region and Gap Analysis | Coach Data – the current scheduled coach offer |
| | Bus Data – frequency and availability of strategic links |
| | Rail Data – network, frequency, and catchment |

Identifying Potential Demand and Locations	Review of demographic data for the Peninsula region
	Review of tourist data to understand access and routes to tourist destinations and hubs, including airports
	Review of BT Mobile Data to validate findings, provide evidence base, and identify any further gaps not initially found

| Stakeholder Engagement and Feedback | Discussions with scheduled coach operators, town councils and Bristol International Airport to discuss: |
| | Local Needs / Operator Appetite / Airport Demands |

| Optioneering Exercise for Potential Connections | Consideration of the current inter-urban bus (strategic link) offer in the region, and the suitability of possible connections to/from coach services |
| | Frequency and Service Provision / Quality and Ease of Interchange / Potential Population Reach |

| Next Steps | Further discussions with operators to improve 'third party' connections / Continued engagement via the new Peninsula Coach Forum |

Note: A strategic link, in the context of this study, refers to frequent (typically hourly or better) services connecting major towns/cities across the Peninsula Region, where no connection is required. These services may also supplement direct rail connections.

Following this, an optioneering exercise was carried out to identify short-, medium- and longer-term solutions, as shown in **Figure 1-2**.

Figure 1-2 – Adopted Methodology for Optioneering Exercise
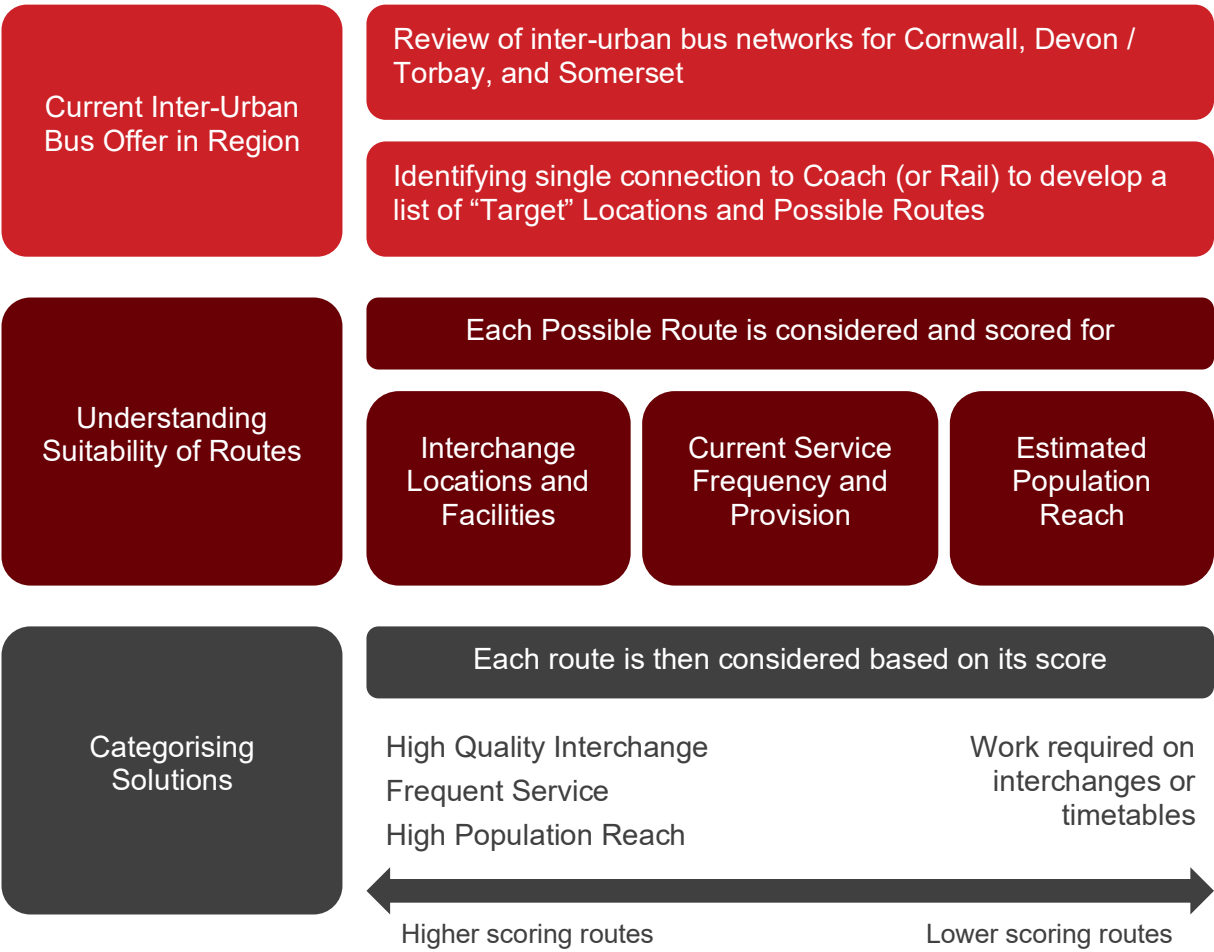

1.4 Current Scheduled Coach Offer

A small number of daily scheduled coach services operate to and from the Peninsula Region. No route wholly operates within the area, instead routes connect the region with London, Birmingham and Bristol. However, the majority of the South West Falcon route (see **Section 1.4.5** for further discussion) lies within the region, with only a few eastern stops on the A38 and into Bristol City Centre being outside the region.

1.4.1 National Express

As of March 2025, most scheduled coach services in the region are provided by National Express. These mainly operate along the southern A38 major road network (MRN) corridor through Devon and Cornwall. Since Autumn 2024, the 503-service connecting North Cornwall and the A30 to Plymouth and London was stopped due to not being commercially viable[5], leaving areas such as Okehampton and Launceston without a coach service. **Figure 1-3** details the routes and key stops served by National Express.

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[5] Source: North Cornwall town loses 'lifeline' National Express service - BBC News

Figure 1-3 – Extent of the National Express network in the Peninsula Region
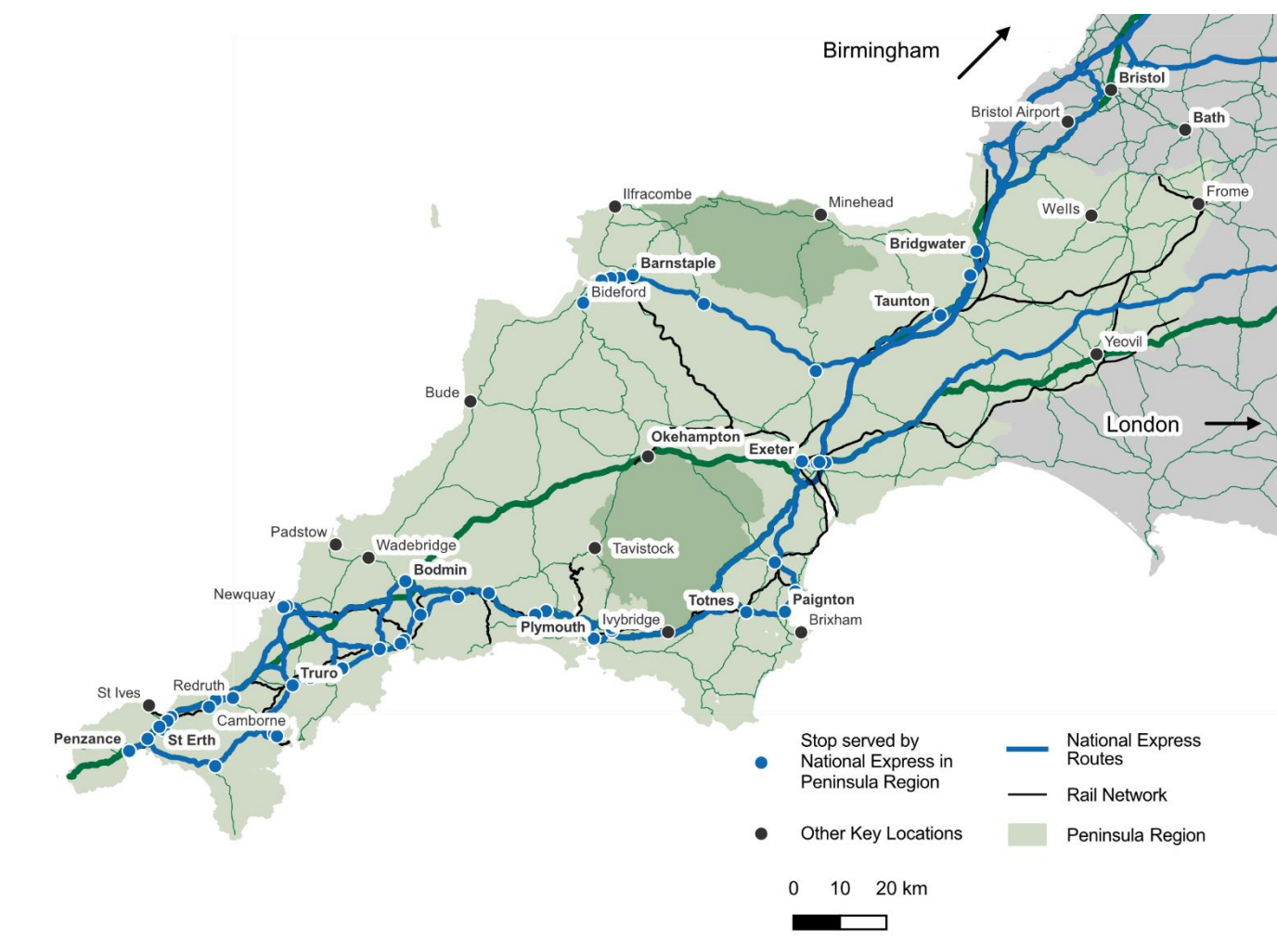
Table 1-1 – Detail of National Express services to / from Peninsula Region

Service	Frequency	Origin	Key Stops Served	Destination
101	Tue – Thurs 2 x Daily Fri – Mon 3 x Daily	Birmingham	Bristol, Bridgwater, North Petherton, Taunton*, Sowton, Exeter	Plymouth
102	2 x Daily	Birmingham	Bristol, Sowton, Exeter, Newton Abbot*, Torquay*, Paignton, Totnes*	Plymouth
104	1 x Daily	Birmingham	Bristol, Bristol Airport, Sowton, Exeter, Plymouth, Bodmin, Newquay, Redruth, Camborne, Hayle, St Erth, Crowlas	Penzance
106	1 x Daily (Overnight)	Birmingham	Bristol, Bridgwater, North Petherton, Taunton, Sowton, Exeter, Plymouth, Liskeard, Bodmin, Newquay, Truro, Redruth, Camborne, Hayle, St Erth, Crowlas	Penzance
404	1 x Daily (Overnight)	London Victoria	Heathrow Airport, Weston-super-Mare, Bridgwater, North Petherton, Taunton, Sowton, Exeter, Newton Abbot, Torquay, Paignton, Totnes, Plymouth,	Penzance

			Lostwithiel, St Blazey, St Austell, Truro, Penryn, Falmouth, Helston	
406	1 x Daily (Overnight)	London Victoria	Heathrow Airport, Sowton, Exeter, Plymouth, Liskeard, Bodmin, Newquay, Redruth, Camborne, Hayle, St Erth, Crowlas	Penzance
501	4 x Daily	London Victoria	Heathrow Airport, Sowton, Exeter, Newton Abbot, Torquay, Paignton	Totnes
502	2 x Daily	London Victoria	Heathrow Airport*, Bristol*, Bridgwater, North Petherton*, Taunton, Wellington, Tiverton, Barnstaple	Bideford
	1 x Daily		Heathrow Airport, Bridgwater, North Petherton, Taunton, Wellington, Tiverton	Barnstaple
504	3 x Daily	London Victoria	Heathrow Airport, Plymouth, Lostwithiel*, St Blazey*, Liskeard*, Bodmin*, St Austell*, Newquay*, Truro, Penryn, Falmouth, Helston	Penzance
	2 x Daily		Heathrow Airport*, Taunton*, Bridgwater*, Sowton, Exeter	Plymouth

*stop only served by certain journeys

1.4.2   FlixBus

At the start of 2025, FlixBus only operated two return journeys on four days each week (Thursday – Sunday nights, and Friday – Monday daytimes) between Plymouth and London Victoria via Exeter, Taunton and Bristol. However, at the end of 2024, a new partnership deal was signed between FirstBus and FlixBus at the end of 2024, as part of which, First depots in Taunton and Truro have provided new services on their behalf.

The network has grown with additional daily services operating to Truro, Newquay, Falmouth University and Penzance, in addition to the previous daily journeys operating between London, Bristol, Exeter and Plymouth. As a result of this, and other new partnerships, it is hoped that FlixBus will double their UK network size by the end of Summer 2025.

The extent of the updated network in the Peninsula region is presented in **Figure 1-4**.:

Figure 1-4 – Extent of the FlixBus network in the Peninsula Region
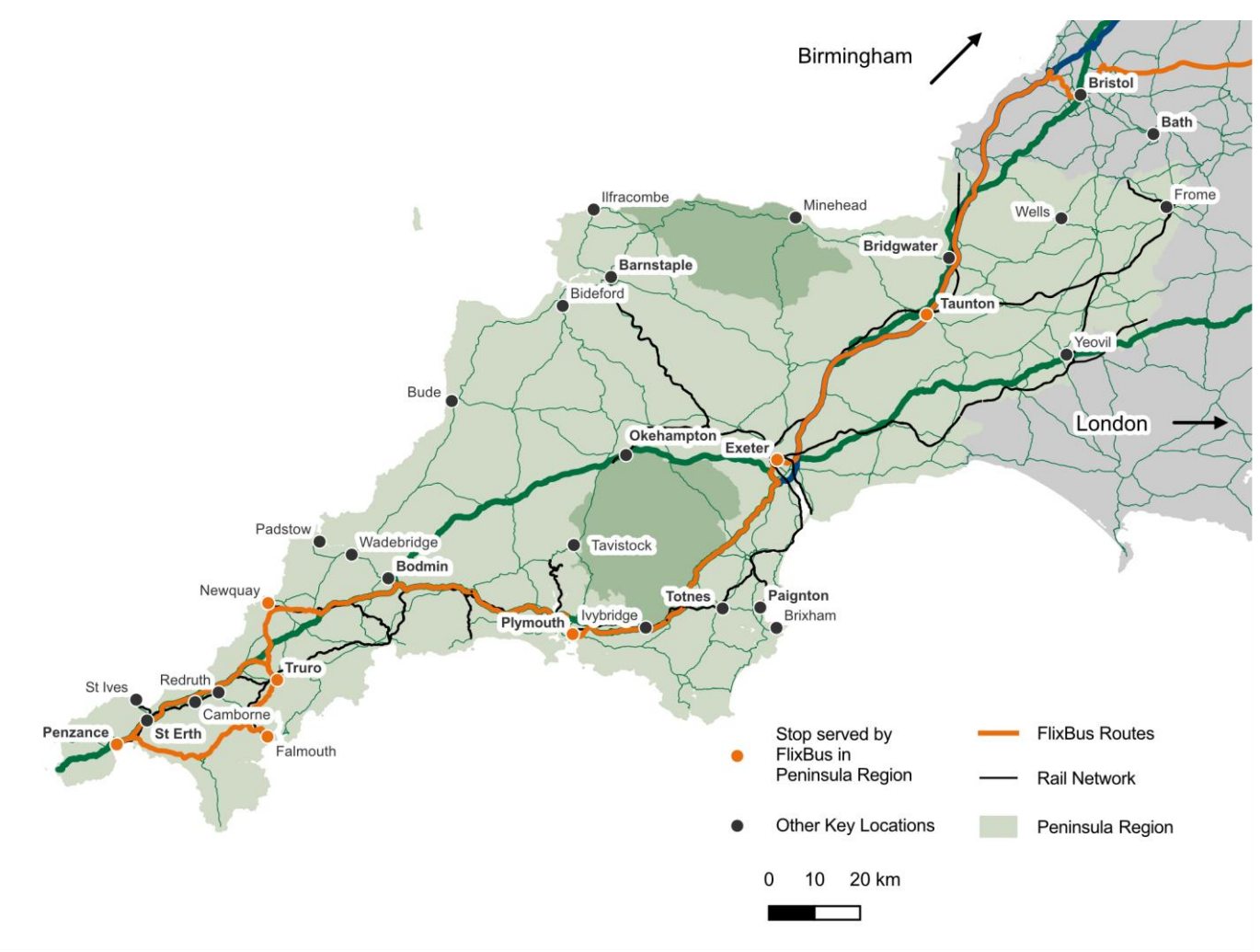
Table 1-2 – Detail of FlixBus network to / from Peninsula Region (from May 2025) [6]

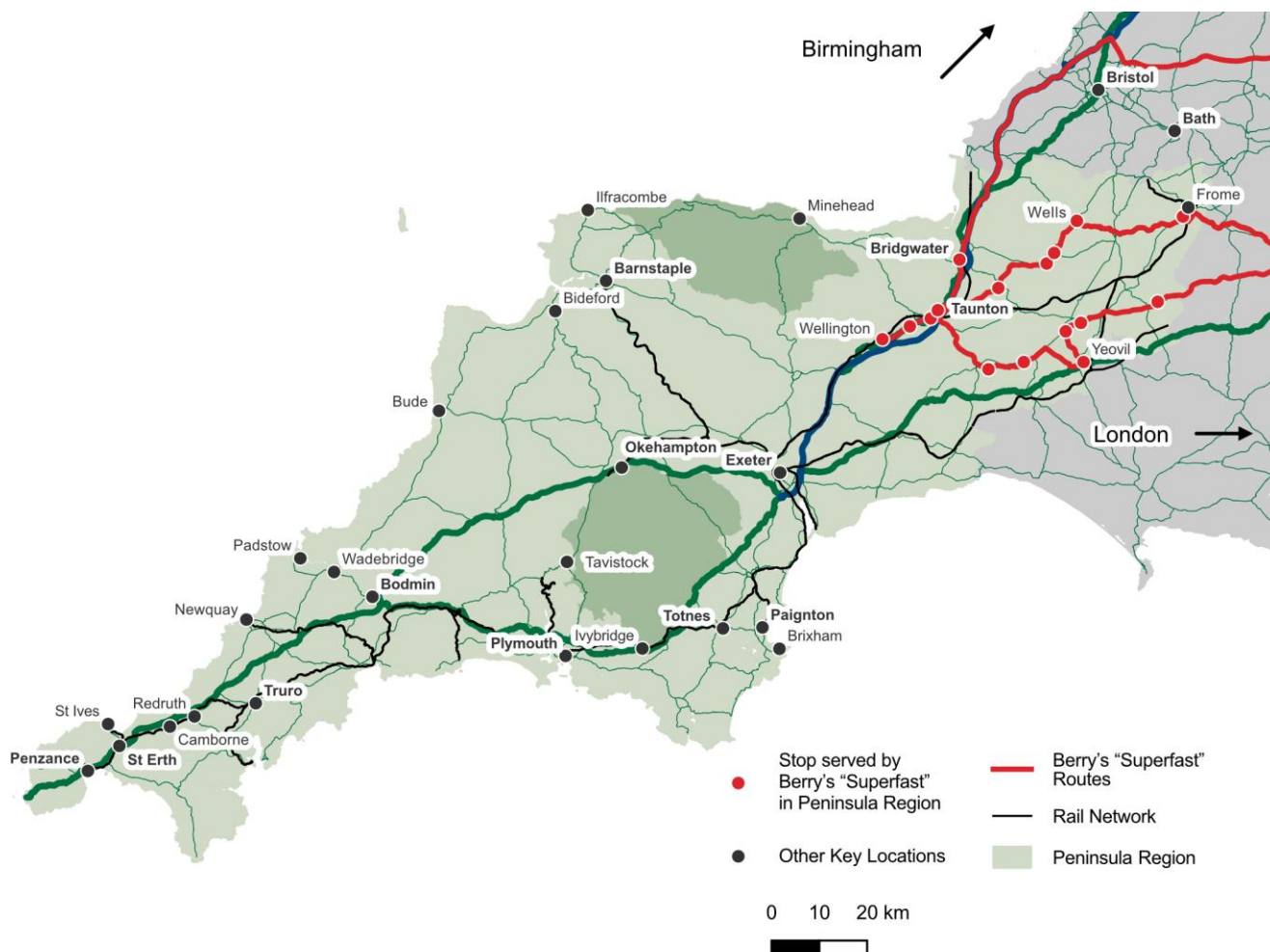| Service	Frequency	Origin	Key Stops Served	Destination
045	2 x Daily (Monday to Thursday) 3 x Daily (Friday, Saturday, Sunday)	London Victoria	Bristol, Taunton, Exeter	Plymouth
	1 x Daily		Bristol	Taunton
N45	1 x Daily (Thursday to Sunday only)	London Victoria	Heathrow Airport, University of Reading, Bristol, Taunton, Exeter	Plymouth
049	1 x Daily	London Victoria	Bristol, Taunton, Exeter, Plymouth, Truro	Falmouth University
	1 x Daily		Bristol, Taunton, Exeter, Plymouth, Newquay	Penzance
N49	1 x Daily	London Victoria	Heathrow Airport, Bristol, Taunton, Exeter, Plymouth, Newquay	Penzance

1.4.3 Berry's Coaches (Berry's "Superfast")

The eastern part of the Peninsula area is connected to London by several daily services operated by Berry's Coaches of Taunton. Their "Superfast" routes serve Taunton, Wellington and Yeovil on several daily journeys across 3 routes and provides connections to and from areas not otherwise served by national operators. These services are timed to be suitable for day trips from North Somerset and Wiltshire to London.

Although their services are cross-sold by National Express and FlixBus as third-party services, Berry's are the only independent scheduled coach operator in the region. Their services are mapped in **Figure 1-5** and detailed in **Table 1-3**.

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[6] Source: FlixBus – Bus Times

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Figure 1-5 – Extent of Berry's "Superfast" services in the Peninsula Region

Table 1-3 – Detail of Berry's "Superfast" services[7]

Service	Frequency	Origin	Key Stops Served	Destination
SF1	2 x Daily	London Hammersmith	Bridgwater, North Petherton, Taunton	Wellington
SF2	2 x Daily	London Hammersmith	Wincanton, Ilchester, Yeovil, South Petherton, Ilminster	Taunton
SF3	1 x Daily	London Hammersmith	Amesbury, Codford, Warminster, Frome, Shepton Mallet, Wells, Glastonbury, Street	Taunton

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[7] Source: Berry's Coaches – Bus Times

1.4.4 Megabus

Megabus previously operated several services across the Peninsula area to Birmingham, Manchester, Leeds and London. **Figure 1-6** shows the extent of the network at its peak in the early to mid-2000s.

Figure 1-6 – Extent of Megabus network at peak operation (early to mid-2000s) (Megabus)

However, since the 5th December 2024, all Megabus services were withdrawn in England with only Anglo-Scottish services remaining as well as links within Scotland. However, whilst no Anglo-Scottish services travel to/from the Peninsula, the South West Falcon service (see further detail below) linking Plymouth, Exeter, and Somerset locations with Bristol International Airport and Bristol City Centre (24/7) does remain.

1.4.5 South West Falcon

The South West Falcon, operated by Stagecoach South West as part of the Megabus network, connects Plymouth and Bristol with 20 daily journeys – the service operates approximately hourly, for 24-hours each day but with some two-hour gaps during overnight periods.

Unlike other coach services currently operating in the region, the South West Falcon is registered as a 'local bus service' with the Traffic Commissioner. For a service to be registered such, 'separate fares' must be charged for short distances and passengers must be able to disembark within 15 miles (straight line distance) of the place where they boarded[8]. This subtle difference in registration also requires that operators must run the service as it has been registered, 'even if staff members are ill or a vehicle is off the road', and that penalties are imposed should performance fall below a set threshold. Full details of the service (including Stop Locations and Timetable) must be provided to the Traffic Commissioner on registration of the service. This contrasts with services operated by National Express and Flixbus which are unregistered, so operators are not subject to penalties in the event of poor reliability or punctuality. However, these services cannot claim Bus Service Operator Grants (BSOG), so must be operated on a fully commercial basis.

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[8] Run a local bus service: Overview - GOV.UK

Unlike typical local bus services, the South West Falcon has been routed to service stops as close to the Motorway / Strategic Road Network (SRN) as possible (see Route Map in **Figure 1-7**), as opposed to serving stops in town centres (particularly those in Somerset and Devon). By doing so, the time penalty for serving stops is reduced, benefitting longer distance passengers but making local access more challenging.

Figure 1-7 – South West Falcon Route Map
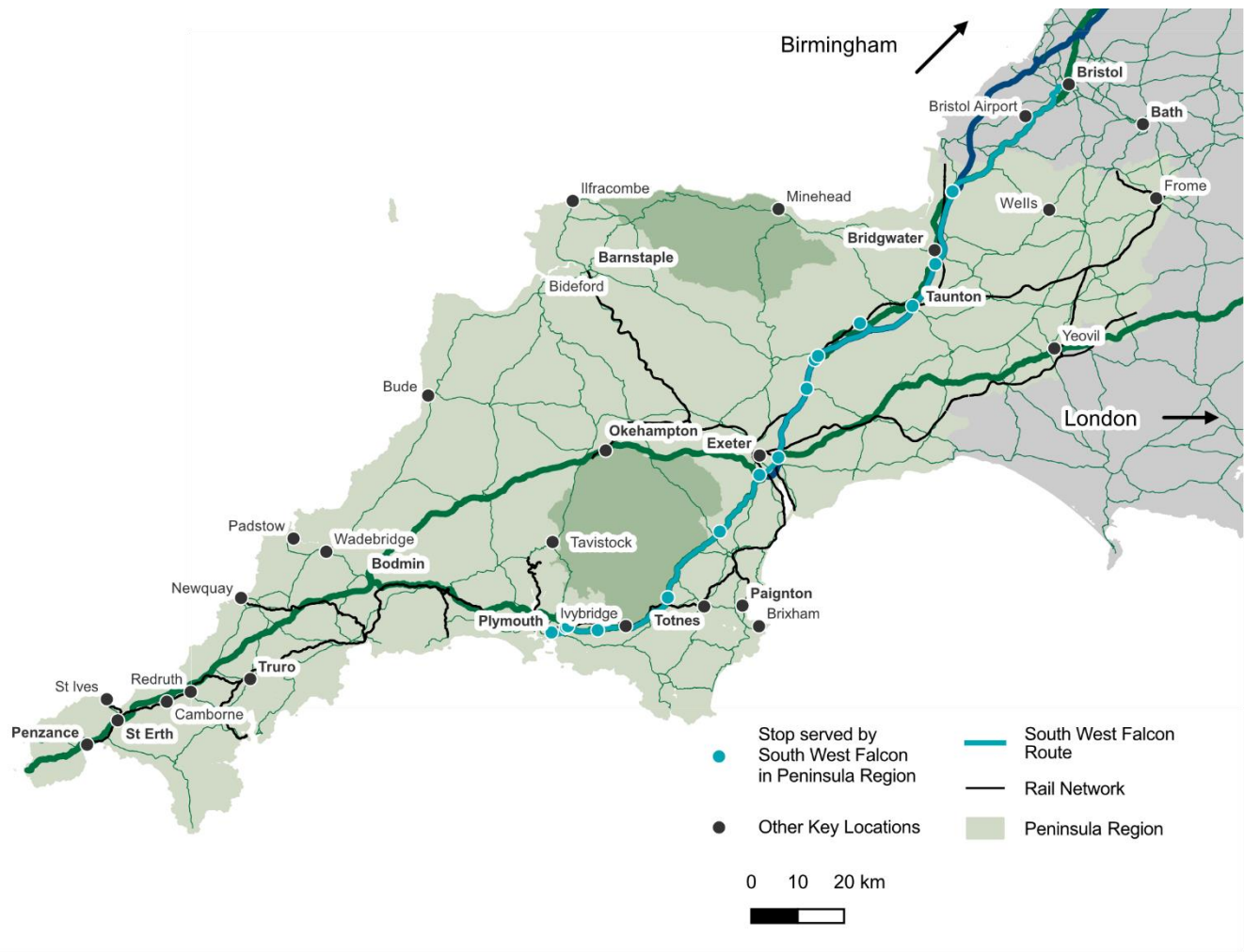
Third-Party Connections and Cross-Selling

In addition to the current scheduled offer, National Express (and more recently FlixBus) have a company approach to partner with local bus operators to offer 'Third-Party Connections'. This means that scheduled bus services are used to 'add' locations to the network by including the timetabled trips in their journey planning system and sell through tickets to/from trunk coach services. The operator of the local bus service will then be reimbursed a portion of the value of the passenger's coach ticket.

The third-party connections and service offerings with National Express within the Peninsula Region are listed in **Table 1-4**:

Table 1-4 – National Express Third-Party Connections

Service	Frequency	Origin (Coach Network Connection)	Key Locations Served	Operator
Third-Party Connections				
28	1-2bph	Taunton	Williton, Watchet, Minehead, Minehead (Butlins)	First Bus
28A	7bpd (Sundays)	Taunton	Williton, Watchet, Minehead, Minehead (Butlins)	First Bus
376	1bph (approx.)	Bristol	Wells, Glastonbury, Street	First Bus
Whole / Part Service Offering				
FAL (Falcon)	Hourly (approx.)	Bristol / Plymouth	Bristol Airport, Taunton, Wellington, Cullompton, Exeter, Drumbridges	Stagecoach South West / Megabus
SF2	2 x Daily	London (Hammersmith)	Wincanton, RNAS Yeovilton, Ilchester, Yeovil, South Petherton, Ilminster	Berry's Coaches
SF3	2 x Daily	London (Hammersmith)	Amesbury, Codford, Warminster, Frome, Shepton Mallet, Wells, Glastonbury, Street, Othery	Berry's Coaches

FlixBus also cross-sell Berry's "Superfast" services between Somerset and London in full. These services are listed in **Table 1-3** (Page 28).

2. Tourism Demand: an opportunity for coach?

2.1 Overview

The tourism industry is a major contributor to the regional economy, employing around 7% of the workforce and experiencing steady growth over the past 30 years — making it the fastest-growing employment sector in the region. With consistently high visitor numbers and strong prospects for further expansion, tourism represents a significant economic driver.

In addition, around 40% of the population are either aged 65 and over or under 16, and therefore not of working age. These groups are especially likely to engage with the visitor economy through organised school trips, leisure outings and day excursions. Collectively, this combination of a thriving tourism market and a large non-working population presents clear and growing opportunities for the coach industry; (i) For tourists, coaches provide a viable and sustainable option for long-distance travel and play a critical role in improving access to airports, particularly where alternative transport links are limited. (ii) Engagement with operators during the development of the Coach Action Plan also highlighted that older populations particularly benefit from the first- and last-mile connectivity that coaches can offer, enhancing their overall mobility and access to key destinations.

Alongside the growth prospects, Peninsula Transport's Economic Connectivity Report[9] has classified the accommodation and food services sector in the region as being more specialised than the average UK levels in terms of the gross value-added location quotients. In comparison, the transportation and storage sector in the region has been classified as a fast growing but under-represented sector as compared to the UK average. Since the interdependence and growth between these sectors have been well documented in many cases, such as through the VisitEngland Tourism and Transport Action Plan[10] and UK Office for National Statistics (ONS)[11], the current state of these sectors being more specialised and underrepresented respectively presents a unique opportunity for both the tourism and transport sectors to grow collaboratively and increase their respective prominence in the region.

The region is a well-known tourist destination attracting both local and international tourists to its unique geographical characteristics and varied landscapes. The region's principal attractions are listed by member authority area as follows:

- **Cornwall:** St Ives, Falmouth, Truro, St Austell, Looe, Newquay, Padstow, Penzance, Fowey, Perranporth, Mevagissey and Bude.

- **Devon:** Exeter, Sidmouth, Exmouth, Dawlish, Okehampton, Teignmouth, Bideford, Barnstaple and Ilfracombe.

- **Plymouth:** The Barbican, Devonport and the city centre.

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[9] Source: Nick Woollett Report Peninsula Transport Sub-National Transport Body 2019-06-26
[10] Source: Tourism and Transport Action Plan - VisitEngland
[11] Source: Coronavirus and the impact on the UK travel and tourism industry - Office for National Statistics

- **Somerset:** Wells, Taunton, Yeovil, Wellington, Bridgwater, Frome and Glastonbury.

- **Torbay:** Torquay, Paignton and Brixham, collectively known as the "English Riviera".

Over **70% of visitors** come from areas **outside the south west**, meaning the region is susceptible to large seasonal fluctuations in the size of its population and the demands on its transport network.

The M5, Great Western Main Line and West of England Main Line form the region's strategic transport spine. The rural nature of the region means that car travel is the dominant mode for the local population and visitors. However, the M5 stops at Exeter meaning that A30 and A38 are the main routes to North and South Devon, Torbay, Plymouth and Cornwall.

The A30 has undergone improvements so that is it now dual carriageway between Exeter and Penzance to improve the reliability of the road network along this corridor and creating the 'Atlantic Coast Highway'. This means there is significant potential for **coaches** to play a key role in **managing seasonal travel demand**, providing a reliable and efficient alternative to car travel along these key corridors, particularly on the A30/A38 routes where visitor volumes peak and rural public transport options are limited.

2.2 Challenges Faced by the Tourism Industry

The tourism sector within the region faces several challenges, including seasonality impacts (where visitor numbers currently vary throughout the year, and notably decrease in the winter months), competition from other tourist destinations and the need to balance the economic benefits from tourism with the environmental protection mandates. The South West Business Council[12] highlighted that 2024 was a challenging year for the tourism sector in the region, with a drop in visitor numbers of around 15% compared with 2023. According to RSM UK data[13], it is expected that there will be an increase in longer holidays in the UK in 2025.

Furthermore, the RSM UK data suggests that the tourist behaviour is also influenced by travel disruptions such as flight cancellations, geopolitical unrest, bad or uncomfortable weather and rail strikes. Previously, such circumstances have also highlighted the flexibility of coach to respond and provide capacity for passengers as needed: it is often cited especially during rail strikes the promotion and availability of additional capacity on the network. Sustainability is also another important criterion which can impact the tourism sector due to growing awareness and demand for environmentally responsible options among consumers, observed significantly among young professional and high-income households, creating an opportunity for coach as a sustainable, long-distance mode of travel.

2.3 Summary

Improving the regions **scheduled coach offer** provides an alternative method of **long-distance travel** for **residents** and **inbound tourists**. The CPT's Economic Impact of Coach Services Report[14] attributes coaches to being a critical aspect of enabling passengers and workers to access airports.

Additionally, the CPT Coach Manifesto[15] highlights how the coach industry has demonstrated its ability to handle uncertainty and travel disruptions, often stepping in at short notice when rail or other transport

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[12] Source: Tourism Season – how well have we done this year to date? – By Tim jones – South West Business Council
[13] Source: Hotels, travel and tourism industry outlook 2025 | RSM UK
[14] Source: The Economic impact of coach services (CPT, 2024)
[15] Source: CPT Coach Manifesto (2024)

services are unavailable. Greater facilitation of coach routes to different airports and travel destinations could help provide alternative travel options for tourists.

The availability of a lower cost and sustainable alternative for travelling could help to create a shift from private cars, as one coach can keep up to 50 cars off the road. This would assist the region in its efforts to protect the local environment while also better realising some of the economic benefits generated by the growing interest in sustainability across the tourism industry.

Provision of better coach facilities and infrastructure in the region would also benefit passengers in terms of affordability, reliability and journey time savings as compared to the other modes as shown in the Economic Impact of Coach Services Report by the CPT[17]. Initial estimates based on the data from the Backing Britain's Coaches report by the CPT[16] suggests that the provision of better coach facilities is also likely to reduce the number of domestic and short haul flights into the Peninsula region, thereby reducing the greenhouse gas emissions per passenger kilometre up to seven-fold.

In terms of accessibility, coaches (and linked buses) can provide an important travel alternative for those who do not own a car or who are in (or visiting) harder to reach areas not served by alternate modes. Improving connectivity, either by coach or to the coach network via local bus improvements, to tourist destinations in the region would strengthen these existing and specialised sectors and enable them to attract further tourists to the region.

Along with these direct transport user benefits, the indirect benefits of enabling better coach travel in the Peninsula include several social and environmental benefits such as reduced highway congestion, improved safety, and a decrease in the atmospheric and greenhouse gas pollutants.

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[16] Source: CPT - Backing Britain's Coaches (2024)

3. Understanding Movement

3.1 Overview

To gain a better understanding of where in the region visitors are travelling, by what mode and for what purpose, traffic flows, rail data and airport passenger data have been analysed, as shown in **Figure 3-1**.

By adopting this approach, it is possible to gain a greater understanding of the tourist movements by road and if coach could have a greater role in providing access to these locations.

**Figure 3-1 – Approach to analysing travel across the Peninsula Region**

3.2 Traffic Data

To understand the average flows and derive a baseline for analysing the additional traffic generated due to tourist movements, the average traffic per day was analysed for the major and minor corridors in the region. **Figure 3-2** shows the results of this analysis which indicates the presence of a significant concentration of traffic along the M5, A38 and A380 corridors, followed by the A30 corridor. Notably, the increased traffic flows observed on the M5 and A38 begin in Somerset, continue towards Exeter and extend further westward to Plymouth and into Cornwall. The high traffic volumes along these routes are

likely to be associated with both local and regional travel demand along these corridors. Additionally, pockets of high traffic concentration are also observed around prominent towns and cities in the region and around the areas where key roads merge.

**Figure 3-2 – Average traffic flows in the Peninsula Region**
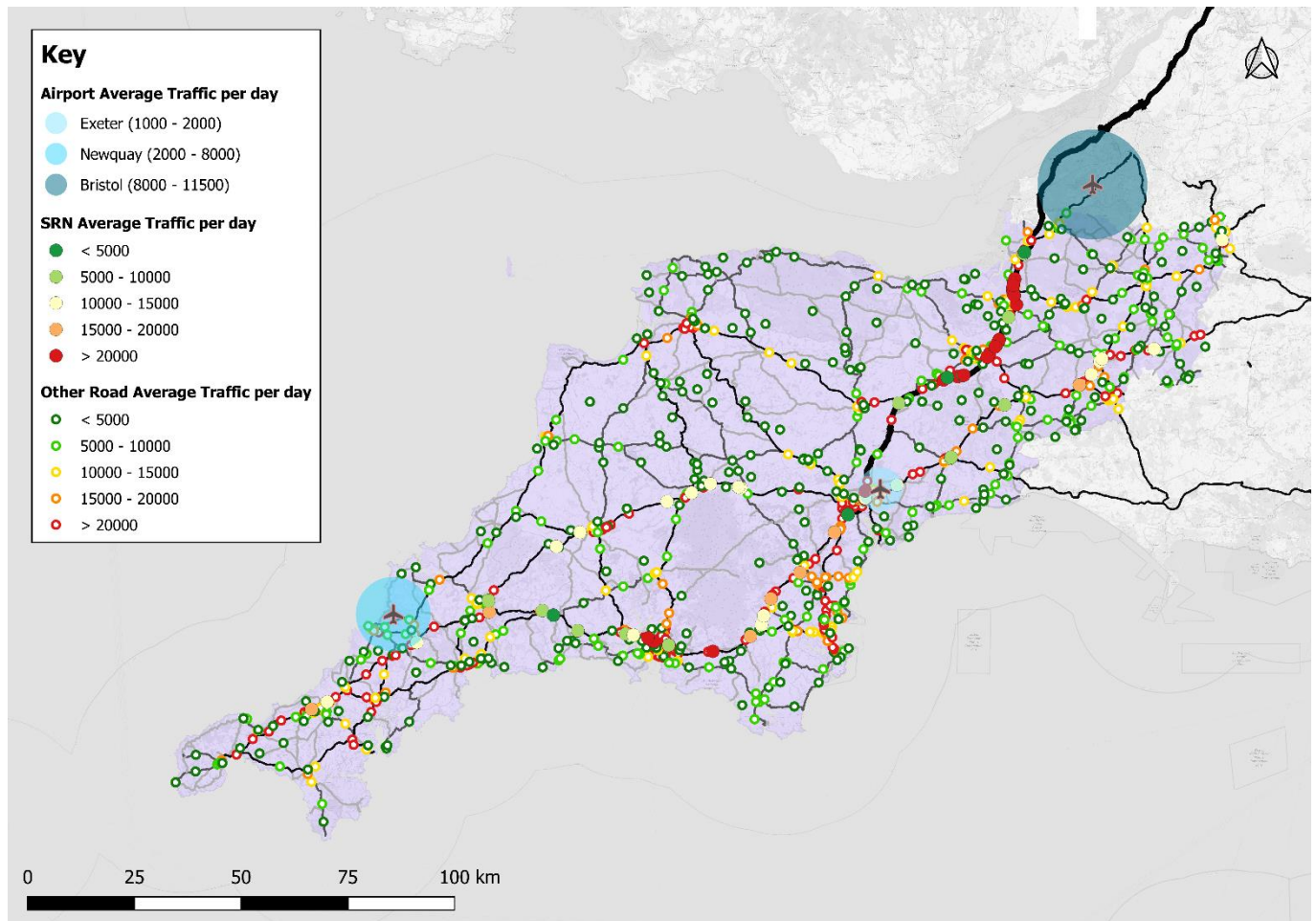
Comparatively moderate traffic flows are observed across Devon and Cornwall on the A30, on the A303 in Somerset and on A361 between Barnstaple and Tiverton. Moderate traffic is also observed in the northern areas of Somerset, mostly along the A39 corridor. In contrast to the SRN and A roads, the traffic volume on non-SRN roads are less than 5,000 vehicles per day.

Additionally, the data shows a concentration of flows around Bristol, Newquay, and Exeter airports which correlate with levels of aviation traffic at these locations. In comparison, the traffic near coastal areas such as Torquay, Plymouth, Falmouth, and Penzance are sparse, which can likely be attributed to a decrease in tourism on an average day in these areas. However, the traffic movements in these areas increase during the peak tourist season in July, as shown in **Figure 3-3**, with the increase in vehicles varying between 500 to 2,000 vehicles per day.

Figure 3-3 – Tourism flows in the Peninsula Region
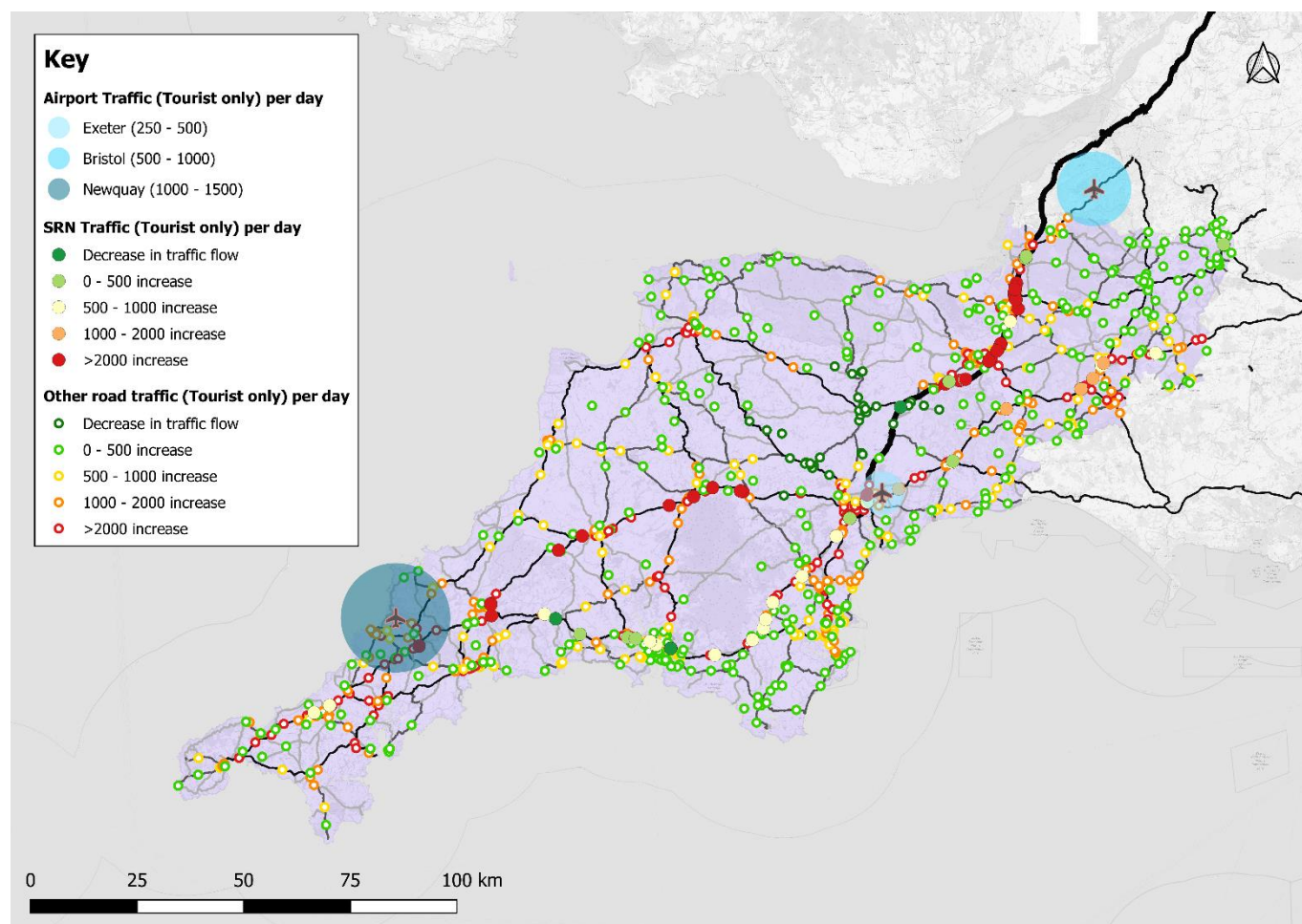
In addition to the increase in flow along coastal areas, the traffic analysis also shows that there is also a significantly large increase in traffic flow along M5, A30 and to a lesser extent the A38 corridors, which are already carrying high traffic volumes during an average day.

These tourist movements also lead to increased vehicular flows across the whole region extending from south Somerset and North Devon to the far south west of Cornwall, including Penzance, St. Just, St. Ives and Falmouth, highlighting that the full extent of the region is susceptible to changes in traffic flows during the tourist season.

The data also highlights a large influx of passengers flying from Newquay Airport compared to the annual baseline number of passengers, indicating the prominence of this regional airport has during the summer months. It is also important to note that both Newquay Airport and Bristol International Airport have plans in place to further develop and grow which will create greater demand at these locations. The change in traffic flows also suggests that areas along the North Devon and North Cornwall coast, such as Bideford, Bude and Padstow are hotspot locations with an increase of over 500 traffic flows per day, although to a lesser extent in comparison to the tourist flows along the southern coast of the Peninsula.

3.3 Rail based movements

In terms of rail connectivity, **Figure 3-4** shows that although areas to the south of region are well connected to the rail network, rail is less accessible in North Cornwall, North Devon and West Somerset, making road the only feasible way to access these locations. Although southern areas have better access to rail, it remains only a single mainline railway line connecting the south west to the rest of the UK, making the area vulnerable to reliability issues as highlighted when the seawall collapsed at Dawlish in 2014, leading the rail connectivity into the south west being cut off for eight weeks[17] and coach stepping in to play an important role as both a replacement for rail services and as a provider of longer distance services to the rest of the country.

Figure 3-4 – Access to Rail in the Peninsula Region
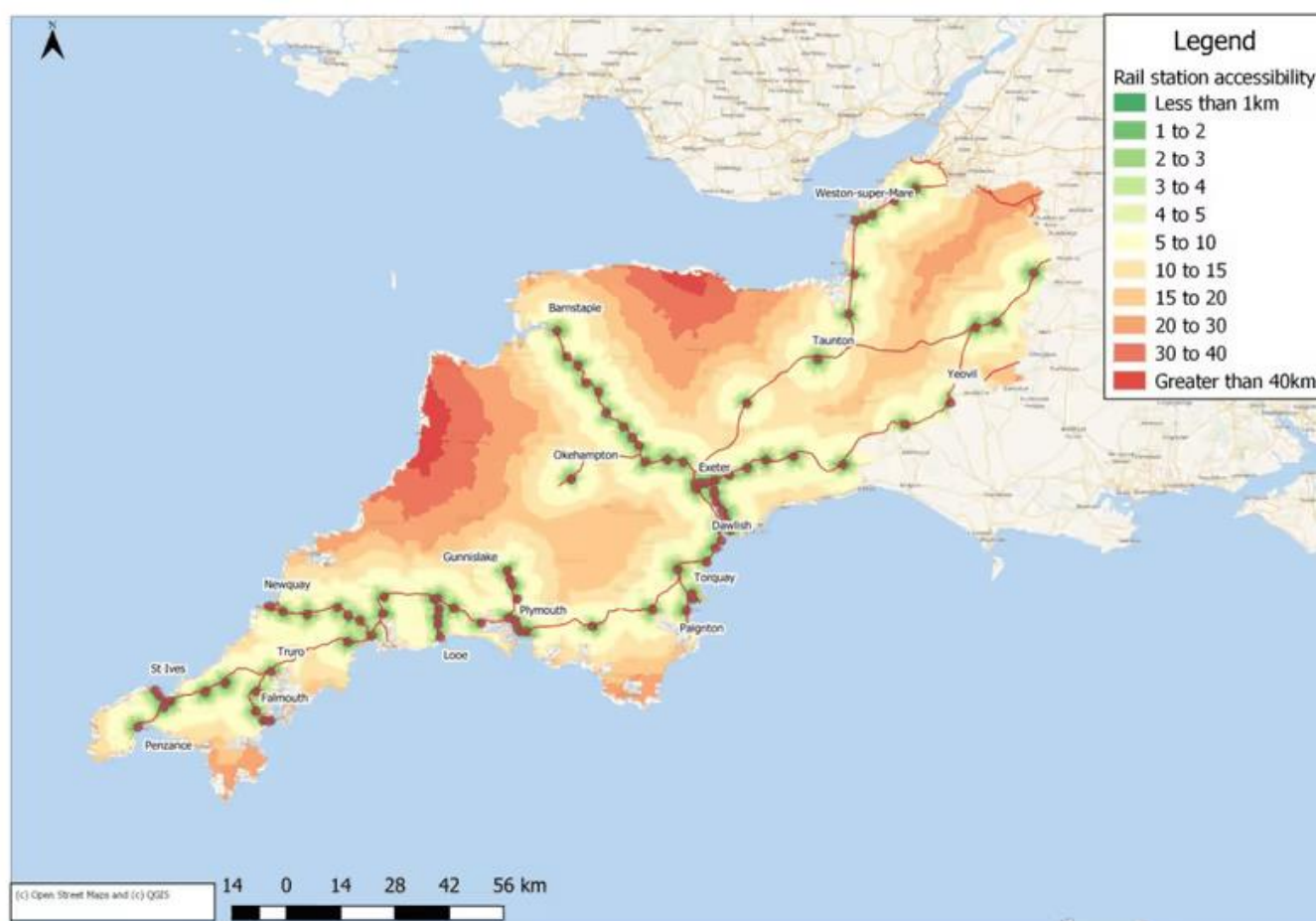
The main route through the region is the route from London Paddington to Penzance, offering regular services via Plymouth and Exeter, and onwards to Bristol, Birmingham, and the North; most services are operated by Great Western Railway (GWR), with some being operated by CrossCountry (XC). The West of England Line also offers connections between Exeter, Yeovil, Salisbury and London (Waterloo), operated by South Western Railway (SWR). Other branch lines provide connections at stations including Exeter, Newton Abbot, Plymouth, and Truro. Rail services in the region are detailed in **Appendix A**, with service provision illustrated in **Figure 3-5**.

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[17] Source: Ten years since Dawlish's railway washed away - Network Rail

**Figure 3-5 – Detail of Rail services in the Peninsula Region**
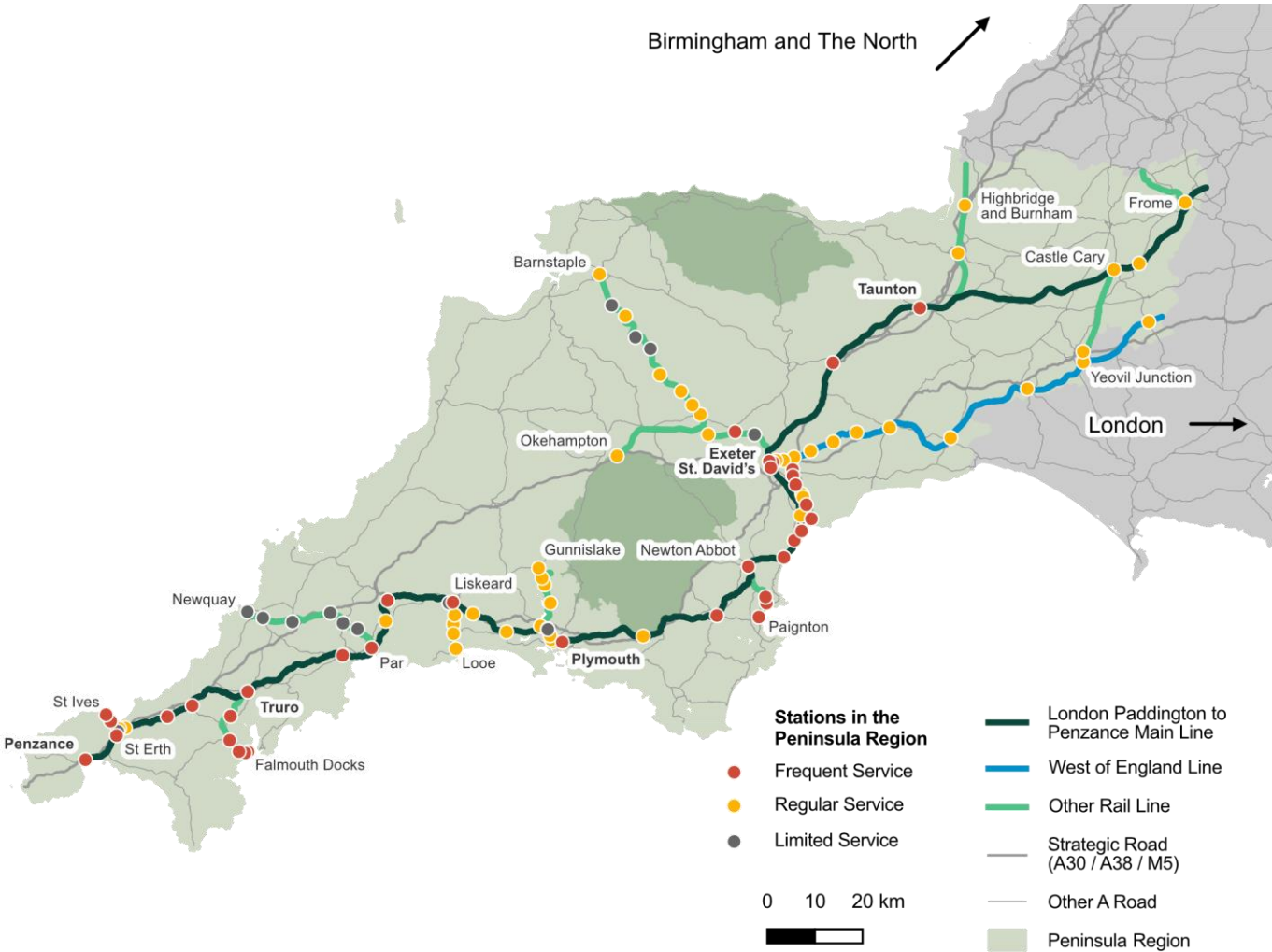
Note: A "Frequent Service" is defined as being at least 2 trains per hour (tph) on its main route in each direction during the weekday off-peak. A station with "Regular Service" typically has either 1tph or 1 train every 2 hours (1tp2h) on its main route in each direction, during the weekday off-peak. (Data taken March 2025).

3.4 Airport based Traffic

As shown in **Figure 3-2** and **Figure 3-3**, the analysis of aviation traffic data indicates that there are primarily three airports which serve the region: these are Bristol International Airport, Exeter Airport and Newquay Airport. Bristol International Airport accommodates the highest passenger traffic on an average day, with around 11,200 passengers using the airport. However, the airport traffic increases only slightly by 6% during the tourist season - remaining mostly stable throughout the year. Demonstrating its more regional status, Exeter Airport handles slightly more than 1,000 passengers on an average day, with the passenger traffic increasing by around 28% during the tourist season - highlighting its importance on tourism in the region. In comparison, Newquay Airport, with an average of around 2,000 passengers per day is observed to have the highest share of tourist passengers which increases the total passenger footfall by 72% in the peak season. This indicates that while the Bristol International Airport serves a regular number of passengers throughout the year across a large catchment area (shown in **Figure 3-6**), the footfall in Newquay and Exeter Airports increase significantly during the tourist season as each plays a crucial role in sustaining tourism in the region. This demonstrates that there is an opportunity for coaches to serve these airports, connect inbound tourists to the region and improve the resilience of the airport offer where additional feeder services (potentially seasonally) are provided.

Figure 3-6 – Key Bristol Airport Catchments based on 2019 passengers (Data from Bristol Airport, 2023[18])

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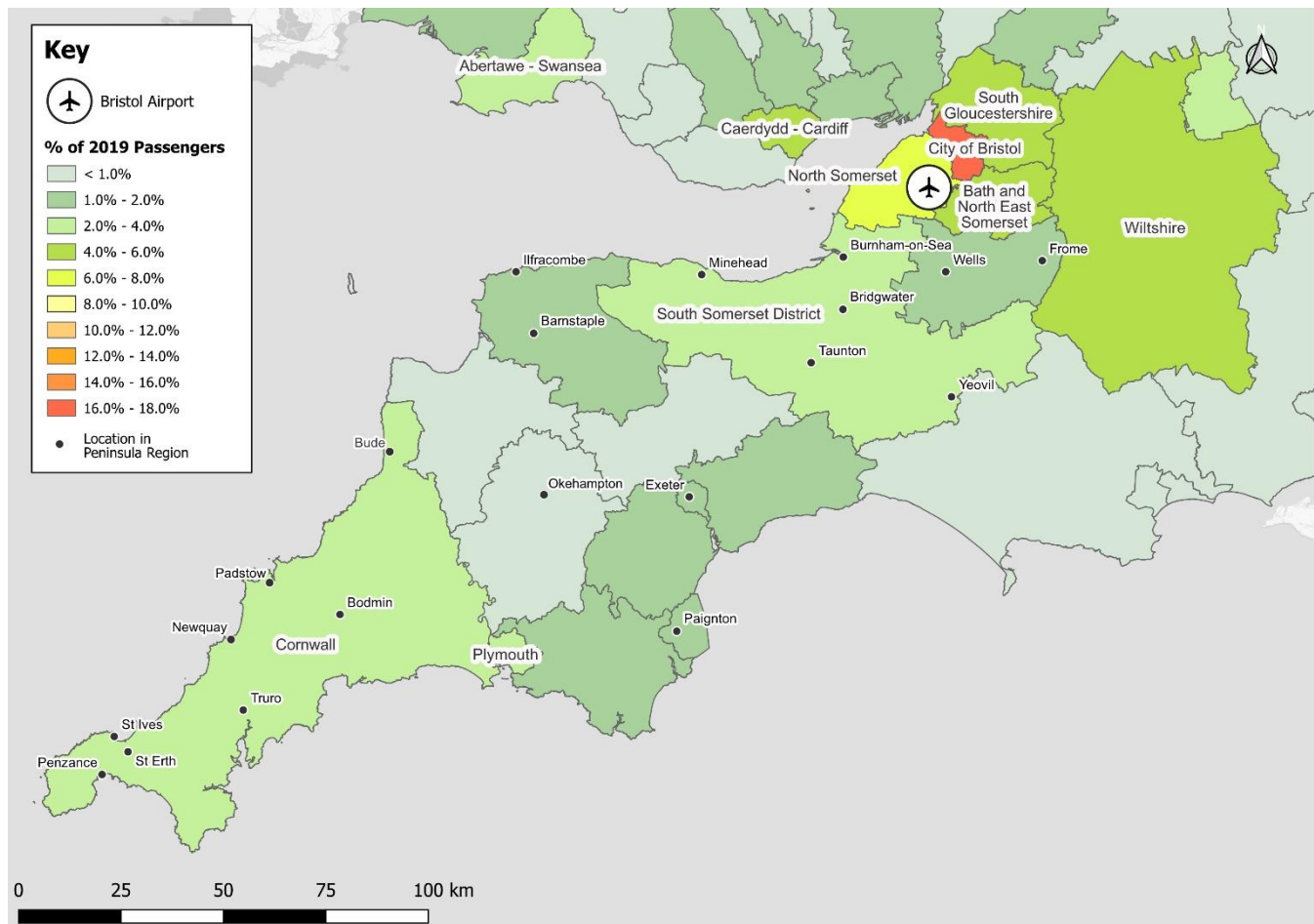
[18] Bristol Airport Surface Access Strategy 2023-2028

In terms of existing connectivity, Bristol International Airport is served by a network of regular bus and coach routes shown in **Figure 3-7**; it is also of note that the Airport is not served either directly or by a nearby Railway Station. The schematic shown was created by Bristol Airport and is currently used to promote the range of bus and coach services departing from the Airport's Transport Interchange.

Figure 3-7 – Bus and Coach Connections from Bristol International Airport Transport Interchange (Bristol Airport, 2025[19])
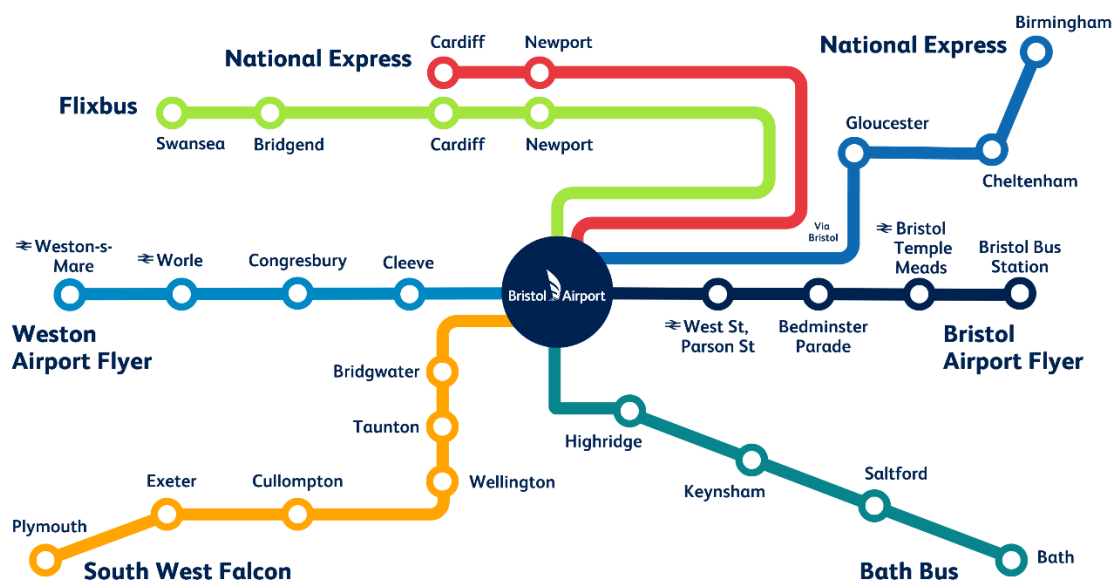
As shown, a range of bus and coach services operate both locally and across the wider South West, South Wales and into the Midlands. In the absence of rail connections, frequent 24-hour bus services operate to Bristol and Weston-super-Mare, with a regular service to Bath. Medium/Long distance connections to the Airport are also available, and cover most of the catchment area identified in **Figure 3-6.** These services are detailed in **Table 3-1**: this includes the small number of National Express services from the Airport into the Peninsula Region, not shown in the schematic above.

Table 3-1 – Coach Services to/from Bristol International Airport

| Service	Frequency	Origin	Key Locations Served[20]	Destination	Operator
Peninsula Region					
FAL (Falcon)	Hourly (approx.)	Plymouth	Drumbridges, Exeter, Cullompton, Wellington, Taunton	Bristol	Stagecoach South West / Megabus
102	1 x Daily (Northbound only)	Plymouth	Totnes, Paignton, Torquay, Exeter, Honiton Road Park & Ride, Bristol, Arle Court Transport Hub	Birmingham	National Express
104	1 x Daily (Southbound only)	Birmingham	Arle Court Transport Hub, Bristol, Honiton Road Park & Ride, Exeter, Plymouth, Bodmin, Newquay, St Erth *(not Fridays)*	Penzance	National Express
106	1 x Daily (Overnight)	Penzance	St Erth, Truro, Newquay, Bodmin, Plymouth, Exeter, Honiton Road Park & Ride, Taunton, Bristol, Arle Court Transport Hub	Birmingham	National Express
Other Coach Services					
100	6 x Daily	Bristol Airport	Bristol, Gloucester *(some journeys)*, Arle Court Transport Hub	Birmingham	National Express
216	10 x Daily	Bristol Airport	Newport	Cardiff	National Express
910	6 x Daily	Bristol Airport	Bristol *(some journeys)*, Newport, Cardiff, Derwen	Swansea	FlixBus

Whilst the Airport is connected to many areas within its catchment, there are still several parts of the catchment in the Peninsula Region which lack a direct coach service. **Figure 3-8** overlays the existing coach network in the region onto the catchment areas for Bristol Airport and clearly highlights the lack of connectivity by coach (and public transport generally) from the region.

Whilst a coach connection generally passes through most local authority areas in the Peninsula where the highest proportion of passengers arrive from, these routes follow a single corridor. As a result, many passengers may be required to change or be dropped off / park at Falcon stops on the M5 to access the coach network.

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[20] Locations listed are those served by journeys calling into Bristol Airport. Not all stops shown.

Figure 3-8 – Bristol Airport Catchment Area with Existing Coach Routes to/from Peninsula Region overlayed (Data from Bristol Airport, 2023[21])
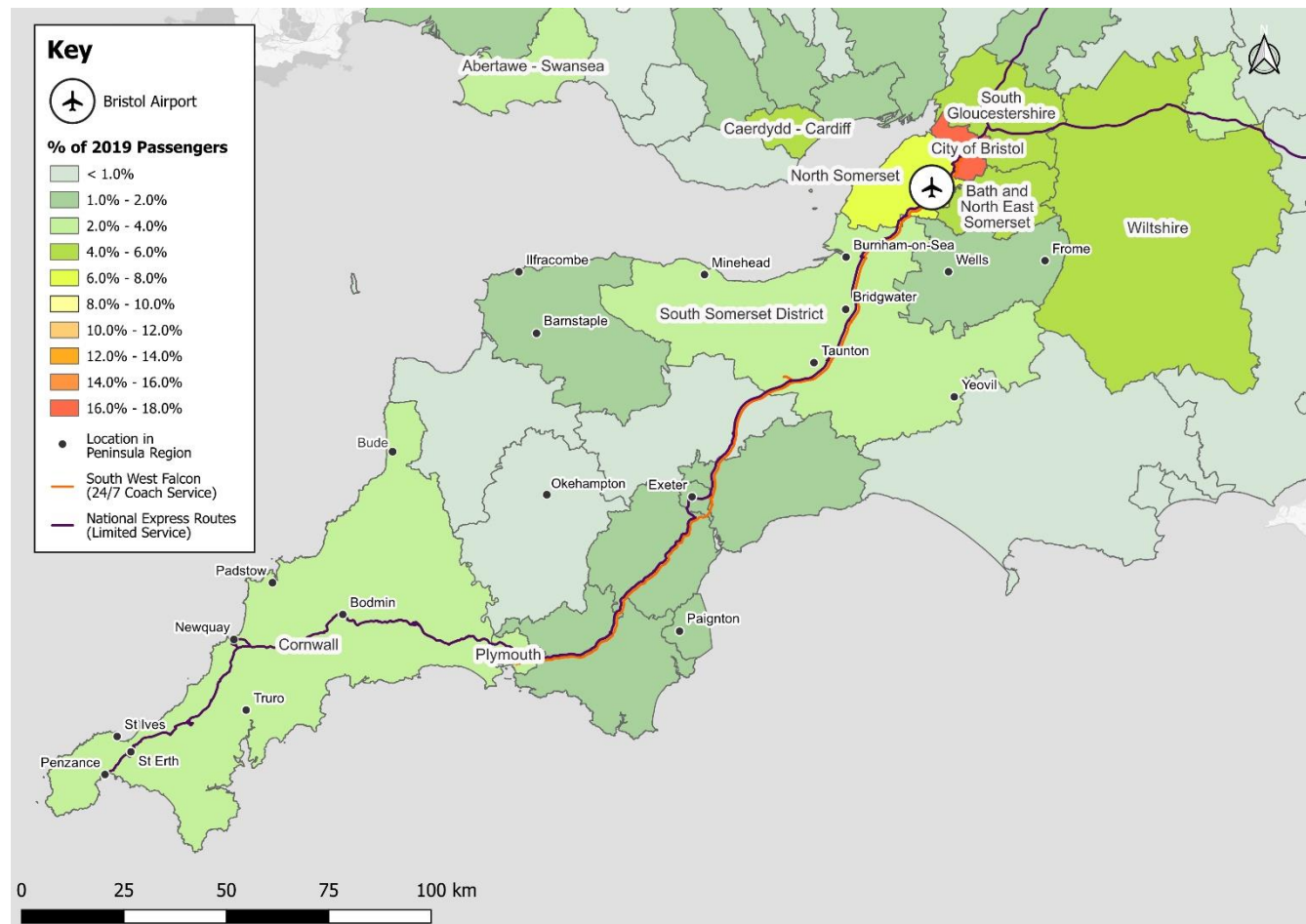
Note: Only direct coach services to/from the Peninsula Region passing through Bristol Airport are shown.

As part of this Gap Analysis, discussions were held with representatives from Bristol Airport. These conversations highlighted a clear ambition to strengthen coach connectivity, particularly from the Peninsula Region, to make full use of the airport's recently opened Bus and Coach Interchange. Of particular interest is the potential development of a new coach service linking North Devon with Bristol Airport, which would help address one of the key gaps identified in the network during the development of the Coach Action Plan. In addition, further engagement has revealed aspirations for a strategic coach connection between the Torbay towns and Bristol Airport — an initiative supported by Torbay Council, although it was acknowledged that achieving commercial viability could be challenging.

3.5   BT Mobile Data

BT Mobile Data has been made available to the STB by Network Rail for the purposes of understanding journey flows by road and rail across the UK. This data source is unique and access is limited and strictly controlled. The dataset highlights origins and destinations based on cell siting from mobile phone masts. This is then aggregated to give anonymity to journey movements. Aggregation is to Middle Super Output Area (MSOA) level, with each area typically containing between 2,000 and 6,000 households. This dataset highlights existing end-to-end journey flows and was used in this study to validate findings from the tourism and demographic data and capture any towns away from the existing coach network which had not been considered, but experienced regular journey flows to a series of key destinations around the country.

Each MSOA within the Peninsula region was considered as an origin, with **Table 3-2** highlighting the destinations being selected.

Table 3-2 – Destinations considered using the BT Mobile Data

Destination	Area Covered	Rationale
London	All Greater London Boroughs, and the City of London	• Extent of the coach network from the Peninsula region • Key coach interchange and destination, offering connectivity across the country • Key destination for journeys from the Peninsula region
Birmingham	Main Local Authority areas covered by the West Midlands Combined Authority (Cities of Birmingham, Wolverhampton and Coventry, and Boroughs of Dudley, Sandwell, Solihull, and Walsall)	• Northern extent of the coach network from the Peninsula region • Key coach interchange and destination, offering connectivity across the country
Bristol	Bristol City Council area	• Closest major city to the Peninsula region • Key destination / calling point on coach services from the Peninsula region
Bristol Airport	MSOA covering Bristol Airport (Wrington, Felton & Dundry)	• Closest large airport to Peninsula region, and main airport covering the north of the region • Key destination / calling point on coach services from the Peninsula region
Heathrow Airport	MSOA covering Heathrow Airport (Heathrow, Harmondsworth & Sipson)	• Key UK Airport with large catchment area for international journeys • Key coach interchange and destination, offering connectivity across the country and an interchange close to, but outside of, Central London • Key destination / calling point on coach services from the Peninsula region
Gatwick Airport	MSOA covering Gatwick Airport (Langley Green & Gatwick Airport)	• Key UK Airport with large catchment area for international journeys

Because the data is shown at the MSOA level, journey flows—especially to urban areas—can seem low, as trips are spread across many zones. To make the journey patterns clearer, these areas have been combined into one destination area. This has been done on the basis that coach passengers travelling to London would likely expect to undertake an onward journey from Victoria Coach Station (the main terminus and coach interchange) by London Underground, bus or taxi to their destination. The equivalent has been considered for Birmingham and Bristol coach stations, both located in their respective city centres.

Average daily road journeys have been considered for September to November 2024. This period has been intentionally chosen to be outside of the peak tourist season and looking to consider more regular movements in and out of the Peninsula Region. It can also be assumed that most of these journeys are completed by car. Analysis of this data has led to maps highlighting the key hotspots for these movements and map outputs showing journeys to Greater London, Bristol, Bristol International Airport and Birmingham are shown in **Figures 3-9 to 3-12**. Map outputs for all destinations are shown in **Appendix B**.

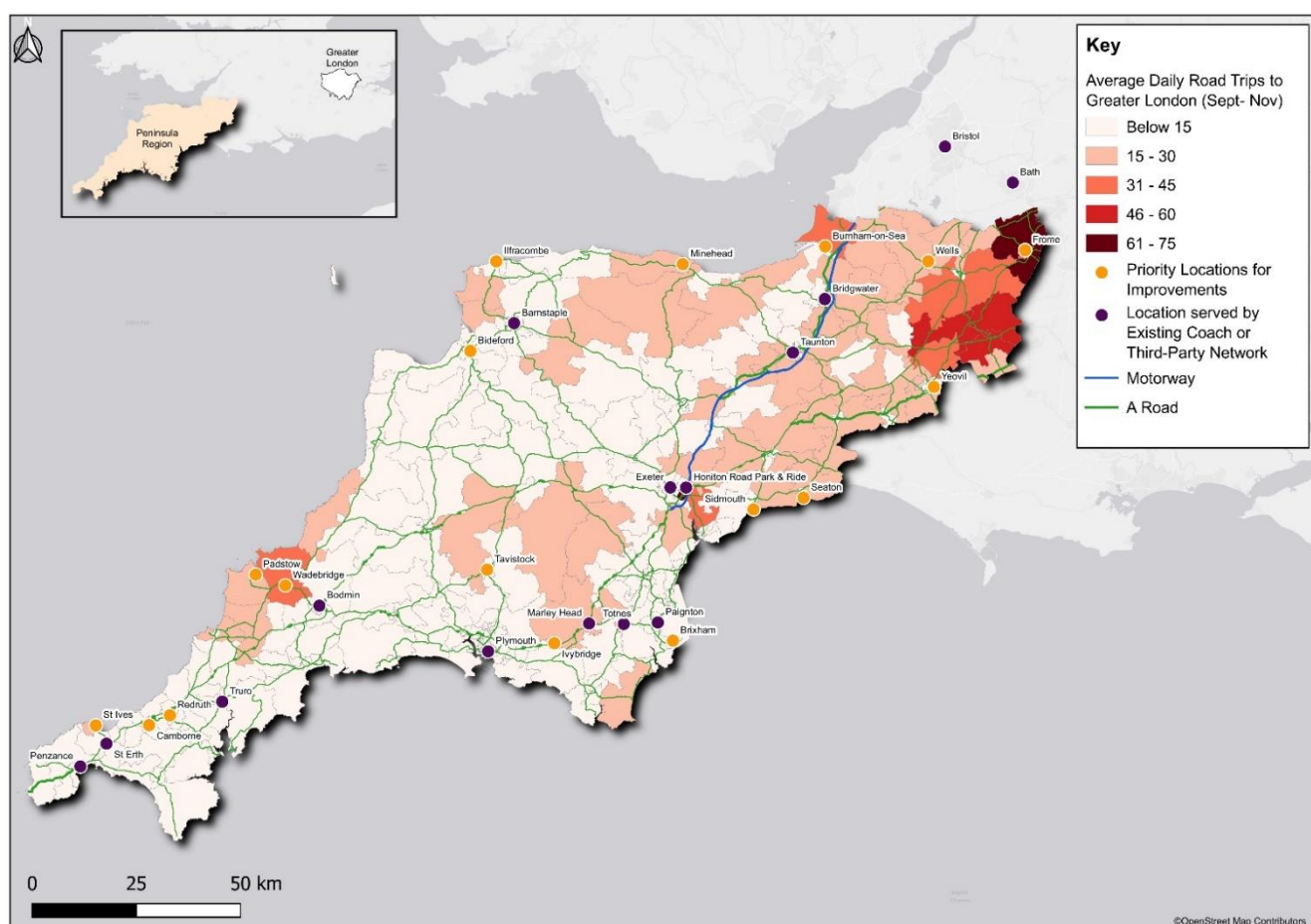**Figure 3-9 – Average Daily Road Trips to Greater London (BT Mobile Data)**

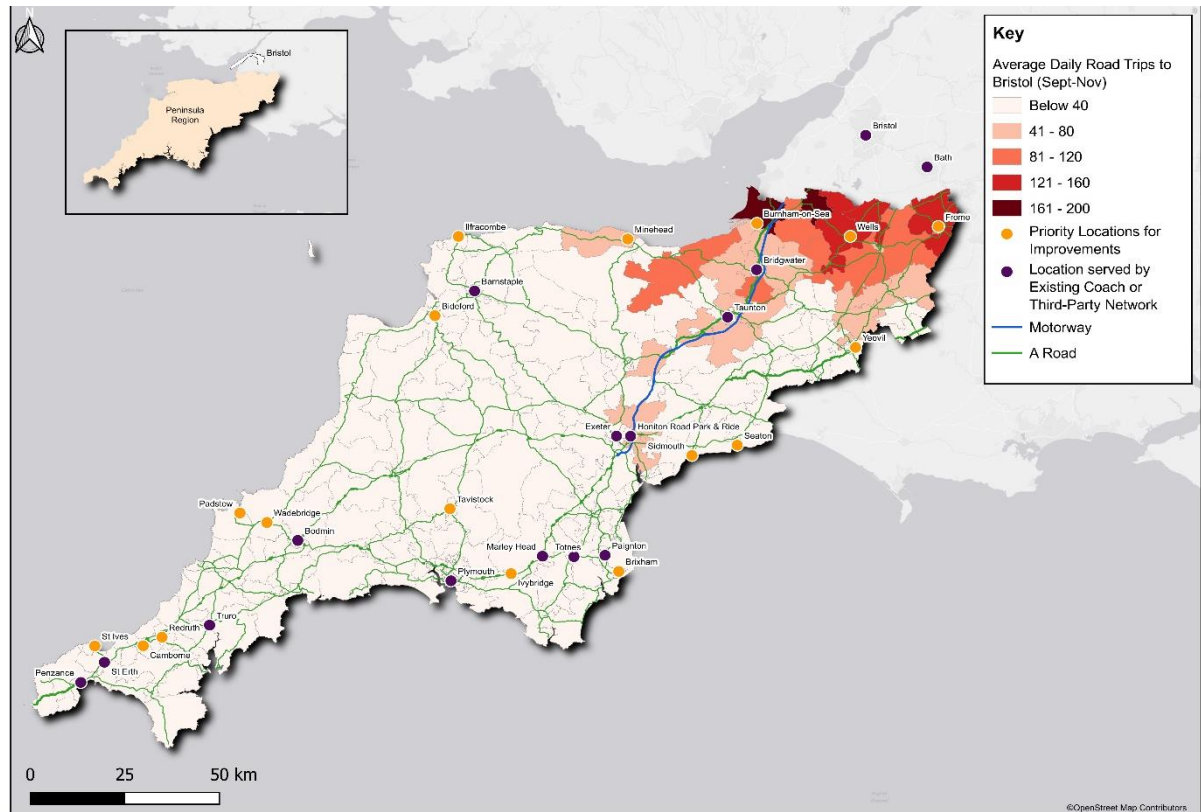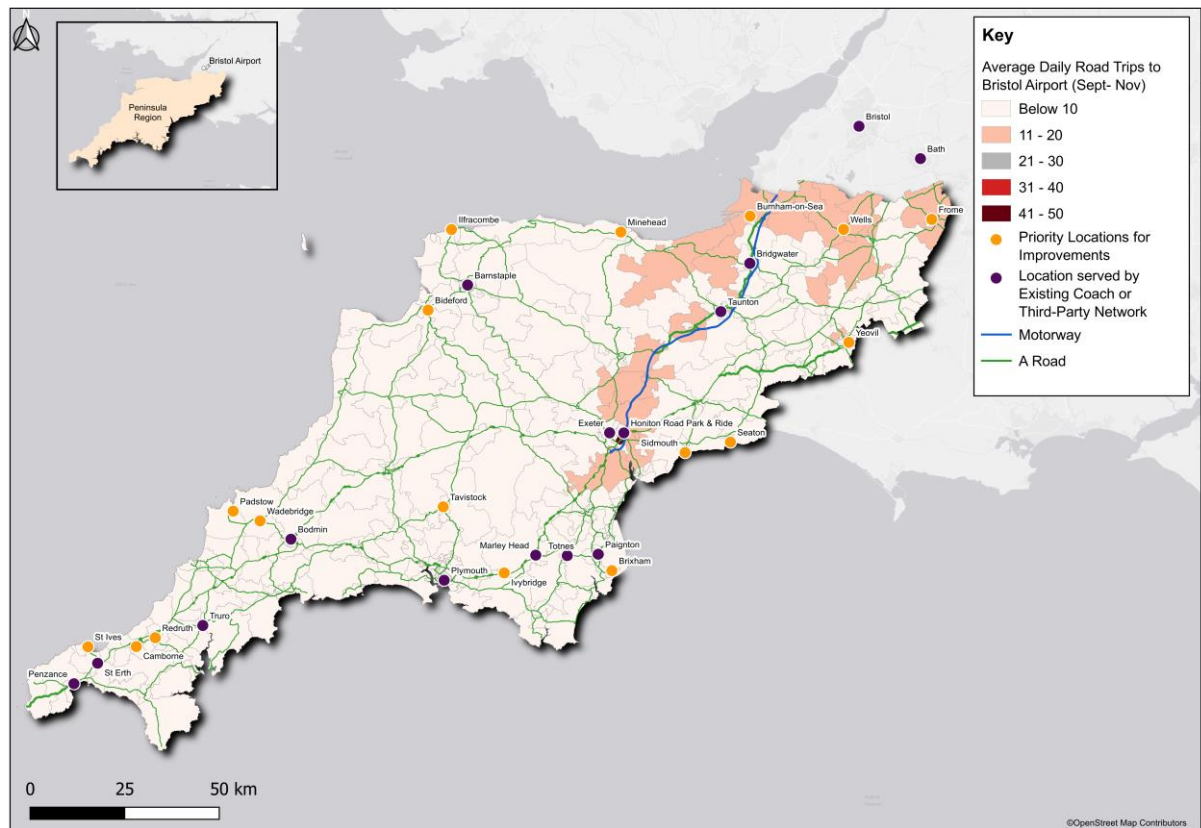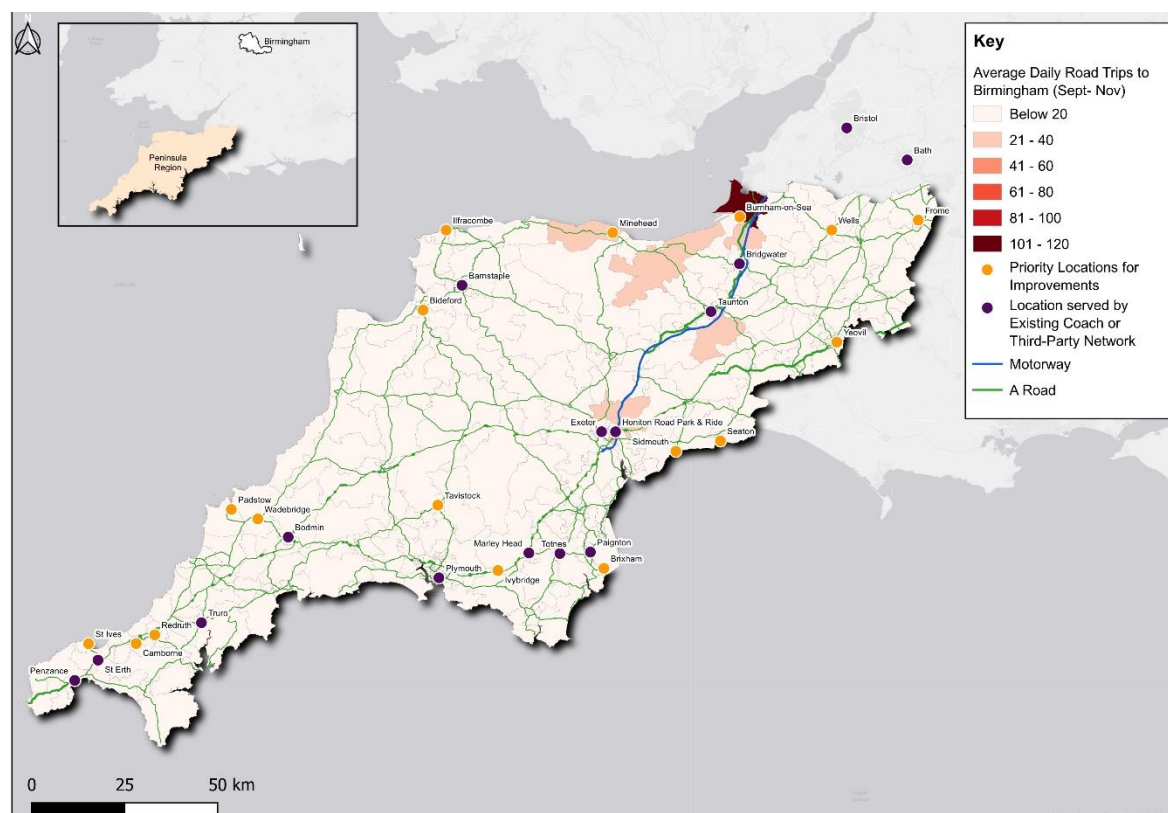**Figure 3-10 – Average Daily Road Trips to Bristol Urban Area (BT Mobile Data)**

Figure 3-11 – Average Daily Road Trips to Bristol International Airport (BT Mobile Data)

OFFICIAL

Figure 3-12 – Average Daily Road Trips to Birmingham (BT Mobile Data)

Several key themes can be drawn from the BT Mobile Data and the maps produced, most notably:

- Journeys to these key destinations typically originate from Somerset and Exeter. This includes high flows from Somerset to Bristol (these could represent commuter journeys).

- The greatest spread of flows from the Peninsula Region are to Greater London, including from several areas not currently served by the coach network including: Padstow, Wadebridge, Sidmouth, Seaton, Minehead and Burnham-on-Sea. In many cases, these areas are consistent with parts of the region currently lacking a rail service. **Figure 3-13** overlays the coach network onto the BT Mobile Data map. To connect into London-bound coaches from these areas typically requires a bus journey to reach the coach network. This journey can, in some cases, be over an hour (e.g. between Seaton and Honiton Road Park & Ride, or Padstow and Bodmin).

- The highest number of journeys observed to Birmingham are from the north of the region, with an especially high number of trips from the Burnham-on-Sea area. This area is not currently connected to the coach network, and no direct rail services currently operate between the nearest rail station (Highbridge and Burnham) and Birmingham.

- Bristol Airport also experiences noticeable flows from parts of Somerset, including Burnham-on-Sea, Wells, Frome, and areas west of Taunton, which are not currently connected to the existing network.

Figure 3-13 – Average Daily Road Trips to Greater London, with Coach Network overlayed (BT Mobile Data)
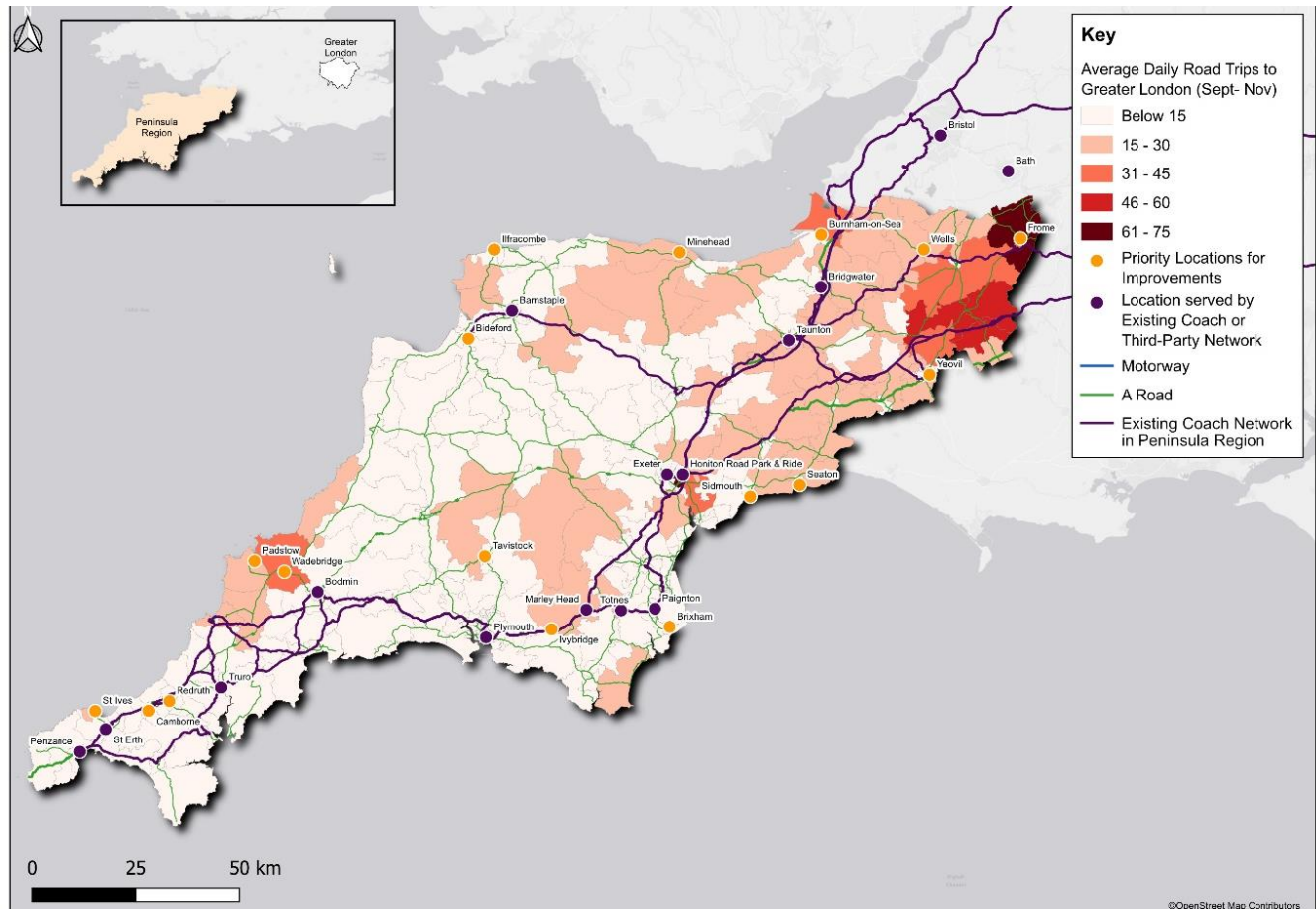
Overall, the BT Mobile Data supports the findings shown elsewhere, indicating that several locations in the Peninsula region—particularly in North Devon and North Cornwall—are not currently connected to the national coach network. However, these areas show levels of demand and usage that suggest potential for successful inclusion, either through third-party connections or direct coach services where feasible.

3.6   Summary of Early Outcomes

3.6.1   Key Gaps in the Network Based on BT Mobile Data

Based on the range of tourism information and BT Mobile Data considered, it has been possible to identify several locations that could benefit from improved access to the coach network, either by third-party connection or direct services. These are shown in **Figure 3-14**.

Figure 3-14 – Summary of Early Outcomes from Tourism Information and BT Mobile Data

Location	Justification
Bude, Cornwall	• No access currently to long-distance transport services, with poor bus connectivity from the town. • Like other areas of North Cornwall, Bude experiences an increase in traffic flows during the peak tourist season.
Padstow, Cornwall	• Higher than typical average daily road trips to Greater London (based on BT Mobile Data).
Wadebridge, Cornwall	• Higher than typical average daily road trips to Greater London (based on BT Mobile Data).
St Ives, Cornwall	• Higher than typical average daily road trips to Greater London (based on BT Mobile Data).
Ilfracombe, Devon	• Regular bus connections to Barnstaple, therefore links to existing rail and coach networks. • Increased traffic flows during the peak tourist season between Barnstaple and Ilfracombe. • Higher than typical average daily road trips to Greater London in area between Barnstaple and Ilfracombe (based on BT Mobile Data)
Sidmouth, Devon	• Regular bus connections to Exeter and Honiton Road Park & Ride, therefore links to existing coach and rail network. • Slightly increased traffic flows in surrounding area during the peak tourist season.
Tavistock, Devon	• Regular bus connections to Plymouth, with links to existing coach network.
Brixham, Devon	• Regular bus connections to Paignton, with links to existing coach network. • Increases in traffic flows during the peak tourist season.
Frome, Somerset	• Regular bus connections to Bath and Chippenham, linking to additional (more frequent) coach services.

3.6.2 Resulting Opportunities Based on BT Mobile Data

Connections to Bristol Airport

Opportunities for network improvements for Bristol Airport can be seen from both the catchment area identified and the BT Mobile Data. From both, services are especially limited from parts of Somerset, North Devon, and Cornwall, relative to the proportion of passengers coming from these areas. **Figure 3-15** illustrates the extent of the coach network in the Peninsula against the current flows.

Figure 3-15 – Average Daily Road Trips to Bristol Airport, with Coach Network overlayed (BT Mobile Data)
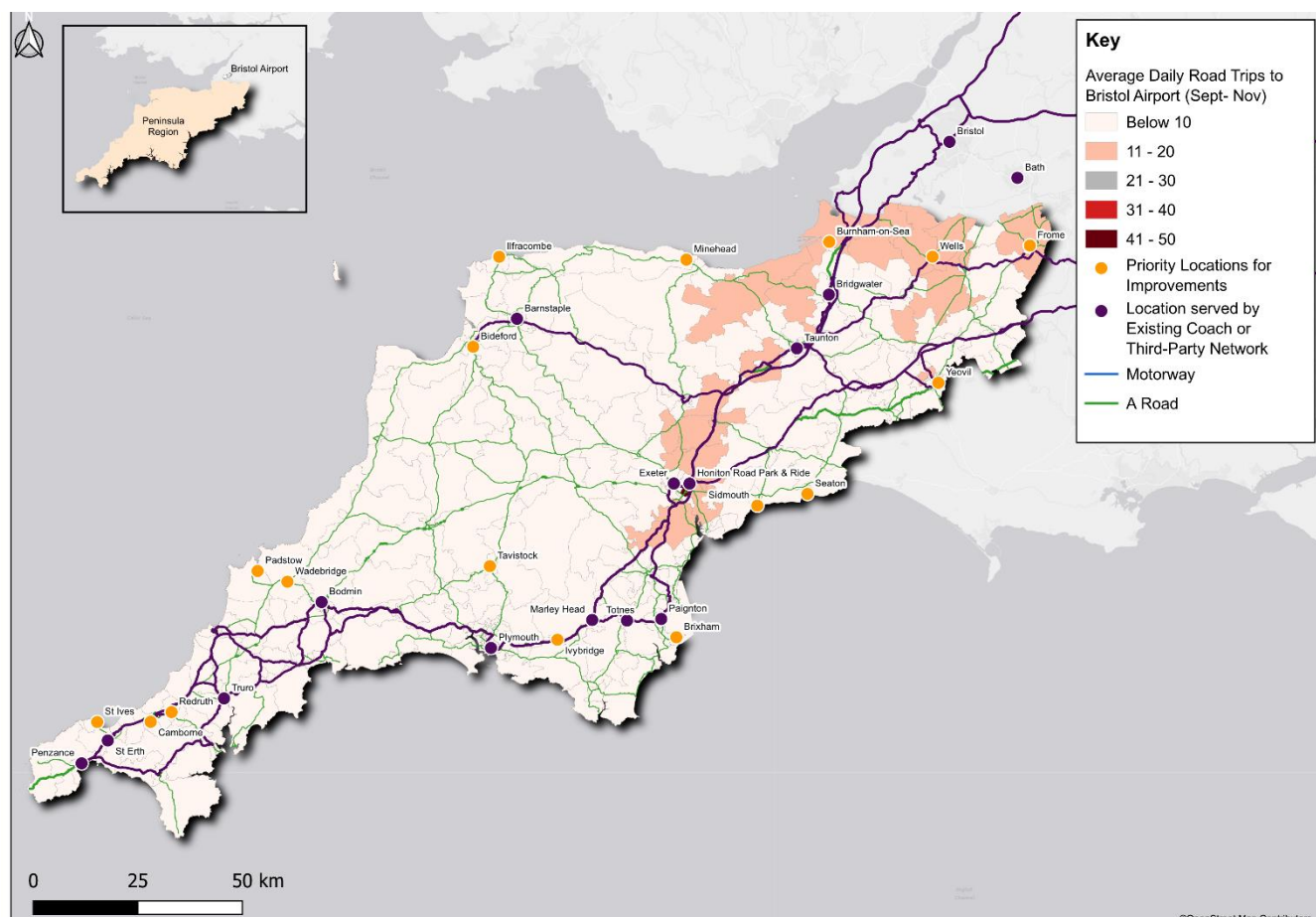
To help support trips on these flows, improvements could be made to the network through the addition of third-party connections, in particular to stops served by the South West Falcon. Alternatively, in cases where this would not be feasible or demand is sufficient, the addition of new regional coach services would offer direct connectivity to Bristol Airport.

Connections to London and Birmingham

Demand to Greater London is spread widely across the Peninsula Region, including parts of North Cornwall, Dartmoor and the northern areas of the region. In contrast, demand to Birmingham is less evenly distributed but shows clear increases from the northernmost areas (around Burnham-on-Sea) and from parts of Somerset and Central Devon.

There are consistent links between higher numbers of road trips and areas **not currently served by the rail network** or lacking **direct train services to London or Birmingham**. This highlights a **significant opportunity for coach services to fill existing gaps in public transport provision.**

Recommendations

- **Expand third-party connections:** Strengthening links to towns across the region through additional third-party coach connections is likely the most effective way to support through journeys.

- **Assess feasibility of new direct coach services:** Where practical, new direct coach routes should be explored to connect high-demand areas not currently served by rail.

- **Consider integration with local transport:** Although local bus connections may be less attractive due to distance and journey times, opportunities for coordinated timetabling or shared facilities could improve overall accessibility.

4. Local Demand: an opportunity for coach?

4.1 Overview

Following engagement with the scheduled express operators during the development of the coach action plan, it was highlighted that coach users were typically students, those over 60-years and females across a range of age and economic groups. Therefore, further demographic analysis was carried out to understand where there could be opportunities for growing local demand for coach within and to/from the Peninsula Region. A review of age, gender, Indices of Multiple-Deprivation (IMD) and car access data was an carried out to inform this analysis.

4.2 Understanding Demographics

4.2.1 Age

Based on the data from Census 2021, Exeter, Falmouth and Plymouth are the region's main student centres with around 37%, 25% and 19% of the population being within the 16-24 age group respectively. Each are well connected by coach with existing scheduled coach services calling at all locations. Other Census wards with relatively high proportions of their population in the 16-24 age group include Penryn and Constantine, Mabe and Mawnan, where approximately one in of four people belong to this age group.

Population distribution within the 16-24 age group is shown in **Figure 4-1**.

Figure 4-1 – Distribution of population aged 16-24 years within the Peninsula Region
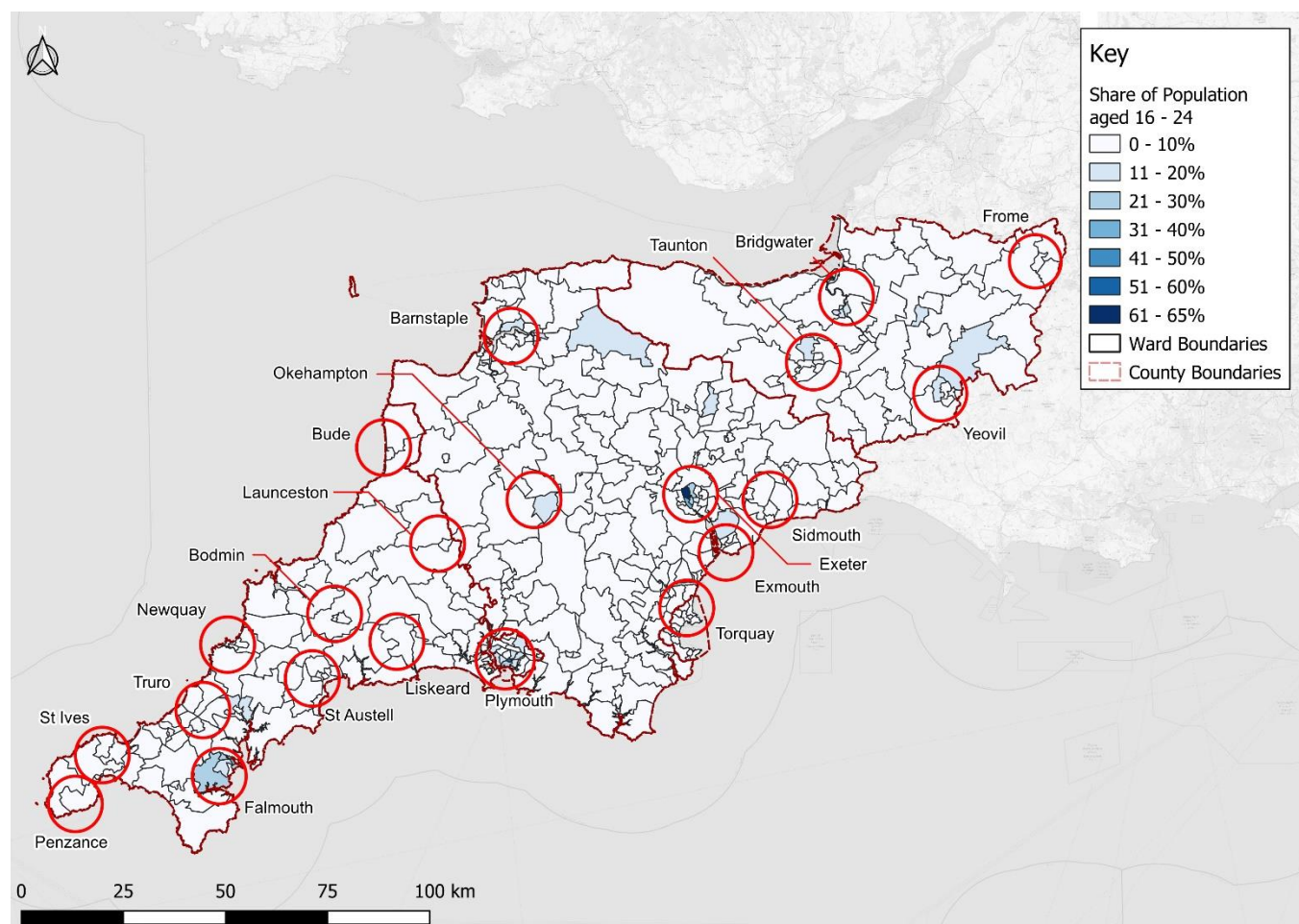
By comparison, **Figure 4-2** shows that most of the Census wards in the Peninsula Region have more than a 20% share of population aged '65 years or over', with the highest concentration of this group observed across seven wards in Devon and Torbay.

Among these seven wards, four (Sidmouth Town, Sidmouth Rural, Seaton and Budleigh & Rayleigh) and two (Teignmouth East and Bishopsteignton) wards are in the East Devon and Teignbridge districts of Devon respectively while Wellswood is in Torbay. 80% of the remaining Census wards across the Peninsula Region see between 20% to 40% of their resident population belonging to the '65 years or over' group. The average proportion of those aged 65 or over in terms of the total population across the Peninsula Region is approximately 28% - this is significantly higher than the national and South West regional averages at 18.4% and 22.3% respectively.

Based on engagement with the scheduled express operators, the higher proportion of elderly population in the Peninsula Region presents an opportunity for the coach industry to further increase its customer base by improvements to first and last mile accessibility to the network. Further, accessibility improvements such as regular updates to websites and printed timetables could also be beneficial to the coach industry on the basis that the prevailing trend in the region, and nationally, is for an increasing proportion of older age groups (an ageing population) which may create a larger captive coach market for the industry in future years.

Figure 4-2 – Distribution of elderly populations aged 65 years or over within the Peninsula Region
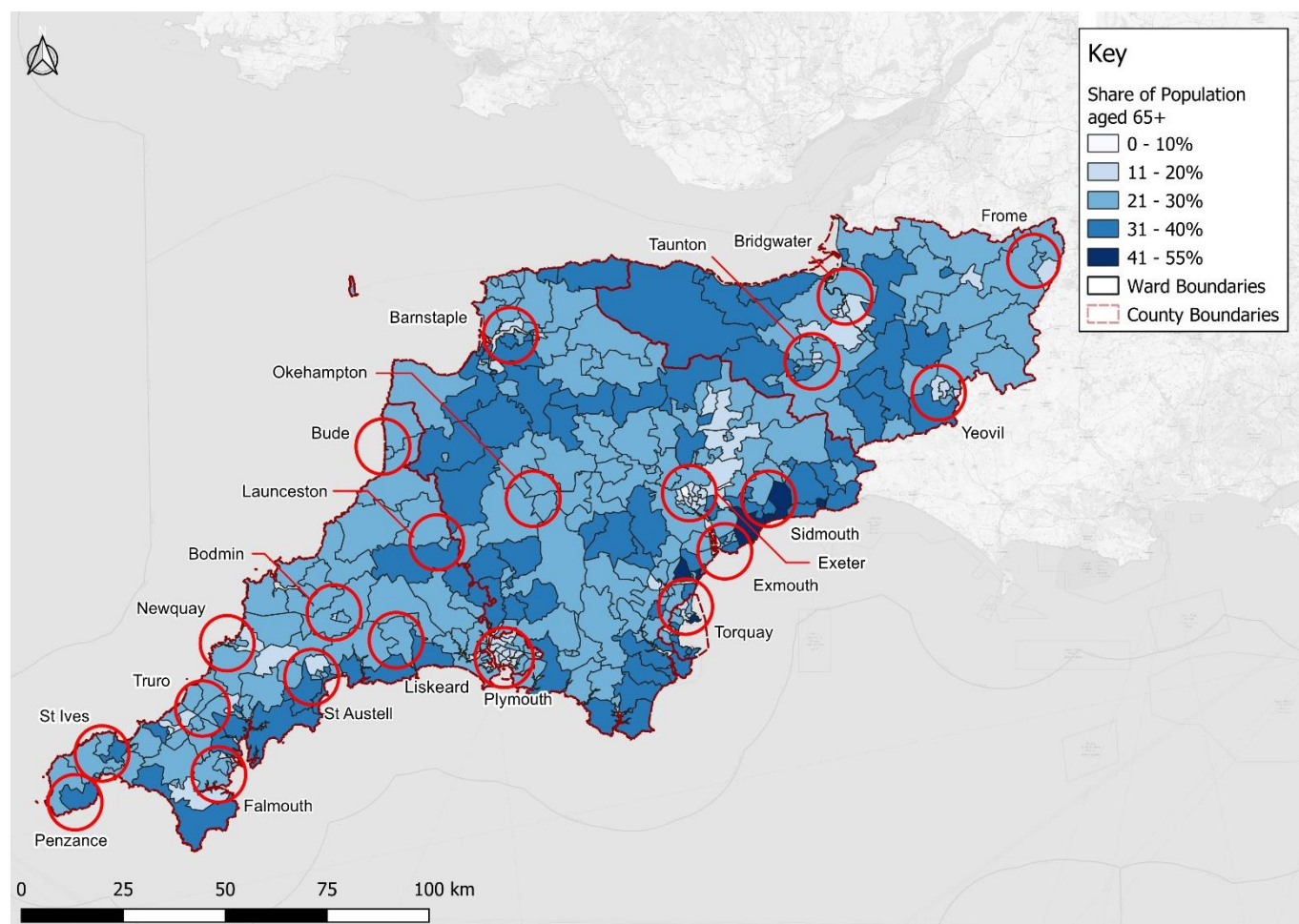
4.2.2 Gender

In terms of gender, Sidmouth town has the highest proportion of female residents followed by Falmouth, Arwenack and Totnes Census wards **Figure 4-3** maps the distribution of the female population across the region. While the proportion of female residents are mostly the same in the remaining regional Census wards, Dartmoor, Woodbury & Lympstone, Heaton Punchardon and Ambrook wards have a significantly low proportion of female residents with less than 900 females per 1,000 males observed.

It is important to recognise that women have different transport needs to men when travelling by all modes of public transport, including coach. This includes a greater awareness of, and requirement for personal safety in addition to women being more likely to travel with dependents. Therefore, ensuring waiting facilities are safe and well-lit is particularly important in making coach an attractive mode, as are the addition of CCTV, access to Help and Information Points (staffed or remote) and Real-Time Information. Further, processes, measures, and communications that are focused on women travellers and designed to create a safer and more welcoming travel environment are important but should be carefully planned and promoted.

Figure 4-3 – Distribution of the female population in the Peninsula Region
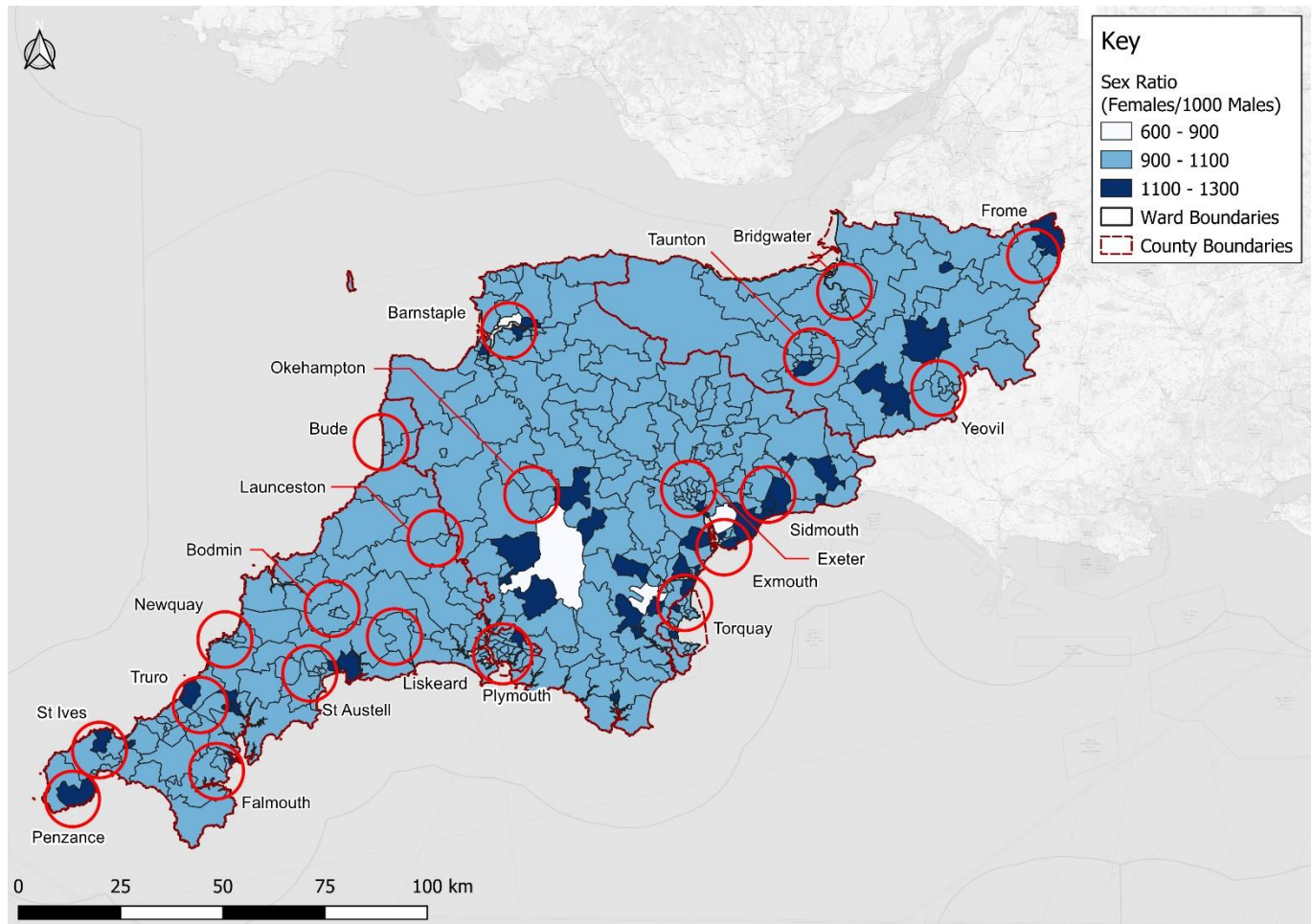
4.2.3   Deprivation

Based on the Indices of Multiple Deprivation (IMD) data shown in **Figure 4-4**, it is observed that there is a significant difference in income deprivation between the northern and southern parts of the region. IMD is the standard measure for relative deprivation for small areas in England, which ranks areas based on key domains including income, employment, health, and the living environment. In the figure below, where darker colours are observed, areas are considered less deprived relative to the country. The southern coast along with the areas around Bideford and Barnstaple are among the least deprived areas in the country while the areas along the northern coast are most deprived areas in the country. Prominent areas of deprivation include areas in and around North Radworthy along the Devon and Somerset border in addition to pockets of areas within eastern parts of Cornwall extending up to the Devon County border.

Figure 4-4 – Distribution of Deprivation within the Peninsula Region (2019 IMD data)
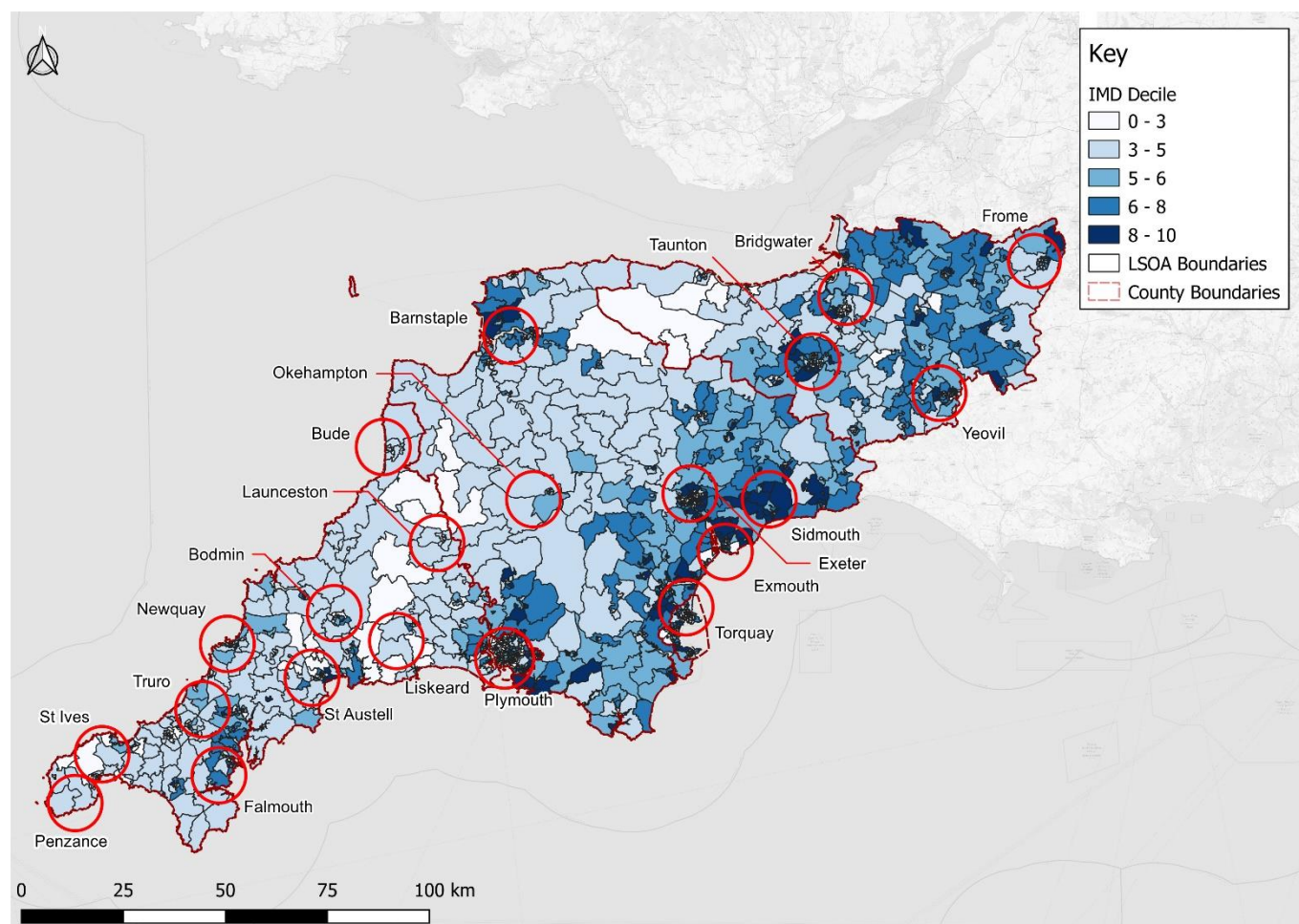
Further comparison with the regional coach network indicates that routes connect the major settlements across the Peninsula, most of which are among the least deprived areas in the region. Interestingly, where coach routes are mostly absent (the northern coasts of Cornwall, Devon and Somerset), higher levels of economic deprivation are found forcing the population to rely more heavily on private modes of transport. The Community Rail: Encouraging and Enabling Modal Shift report by the Community Rail network[21] suggests that the practicalities of mode choice play a crucial role in the final decision making process irrespective of the programs and processes made to normalise public transport. The report highlights that the cost effectiveness and the convenience of car travel is the primary reason which often leads to people choosing car over rail. While the study focusses primarily on community rail, the reasons identified for people choosing car over other modes of transport would equally hold true while planning for alternative travel options through coach connections. Consequently, the report has also identified that the public transport options are most effective when well-integrated with other public modes, are highly visible and are accessible to potential users while being easily understood by the local community.

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[21] Source: Encouraging and Enabling Modal Shift (The Community Rail Partnership, 2021)

4.2.4 Access to Private Car

Lack of access to a private car was highlighted in the Coach Action Plan as an important criterion for consideration of potential coach connections. **Figure 4-5** shows the distribution of the households in the region without access to a private car.

Based on **Figure 4-5**, it can be observed that the areas highlighted as economically deprived (**Figure 4-4**), have a lower share of households with no car ownership, likely due to lack of alternative options Whilst this resolves transport issues to some degree, some people within each community will see accessibility issues exacerbated by the double triple effect of low income, no car access, and no coach access – limiting their personal mobility and wider access to opportunities.

The southern coast of the Peninsula Region has a comparatively moderate to high proportion of households without an access to a car, perhaps reflecting the larger number of residents within older age groups as well as the denser public transport networks supported by regional and national rail services and a larger proportion or city and urbanised areas. As a result, the highest share of households with no car ownership can be observed in central areas of prominent towns and cities such as Exeter, Torbay, Plymouth and Barnstaple - which typically have high accessibility to other modes of transportation.

Figure 4-5 – Distribution of households without a car in the Peninsula Region
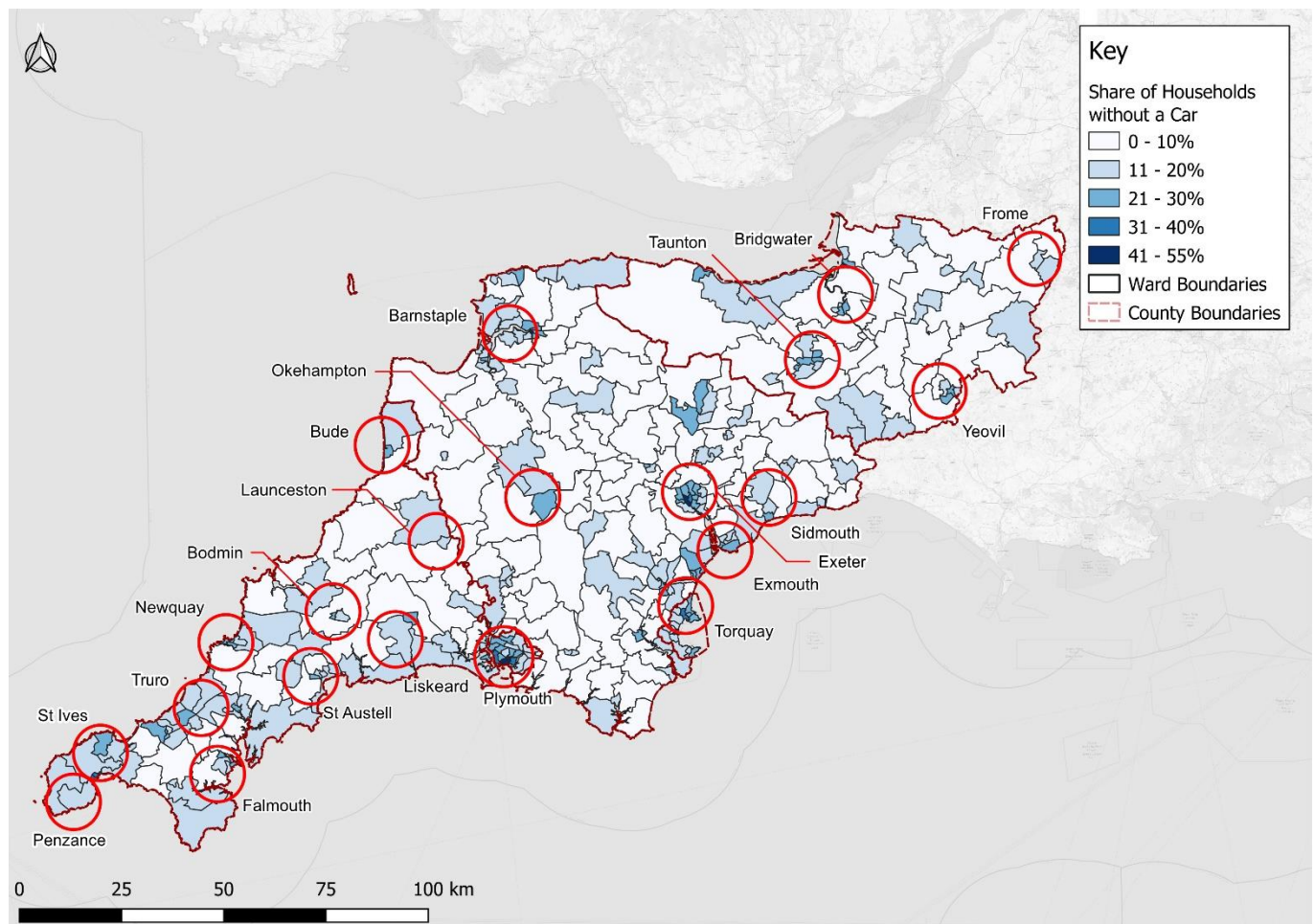
4.3 Summary of Demographic Data

4.3.1 Key Gaps in the Network Based on Demographic Data

The demographic data has highlighted several towns and Census wards across the Peninsula Region which could benefit from improved access to coach. These are typically where stakeholder engagement has also identified groups who present a potential future user base (e.g. high proportions of the population aged 65+, without access to a car or where there is higher than average economic deprivation). These locations are shown in **Table 4-1** and mapped in **Figure 4-6**.

Table 4-1 – Key Locations for Improvements, based on findings from demographic data

Location	Key Justifications for Improvement to coach access
Bude, Cornwall	• Comparatively high proportions of households without access to a private car.
Ilfracombe, Devon	• Higher than average proportion of households lacking access to private car. • Higher than average levels of economic deprivation.
Sidmouth, Devon	• High proportion of population aged 65+. • Higher than typical proportion of households lacking access to private car.
Brixham, Devon	• High proportion of population aged 65+.
Frome, Somerset	• Higher than typical proportion of households lacking access to private car.

Figure 4-6 – Key Locations for improvements, based on findings from demographic data
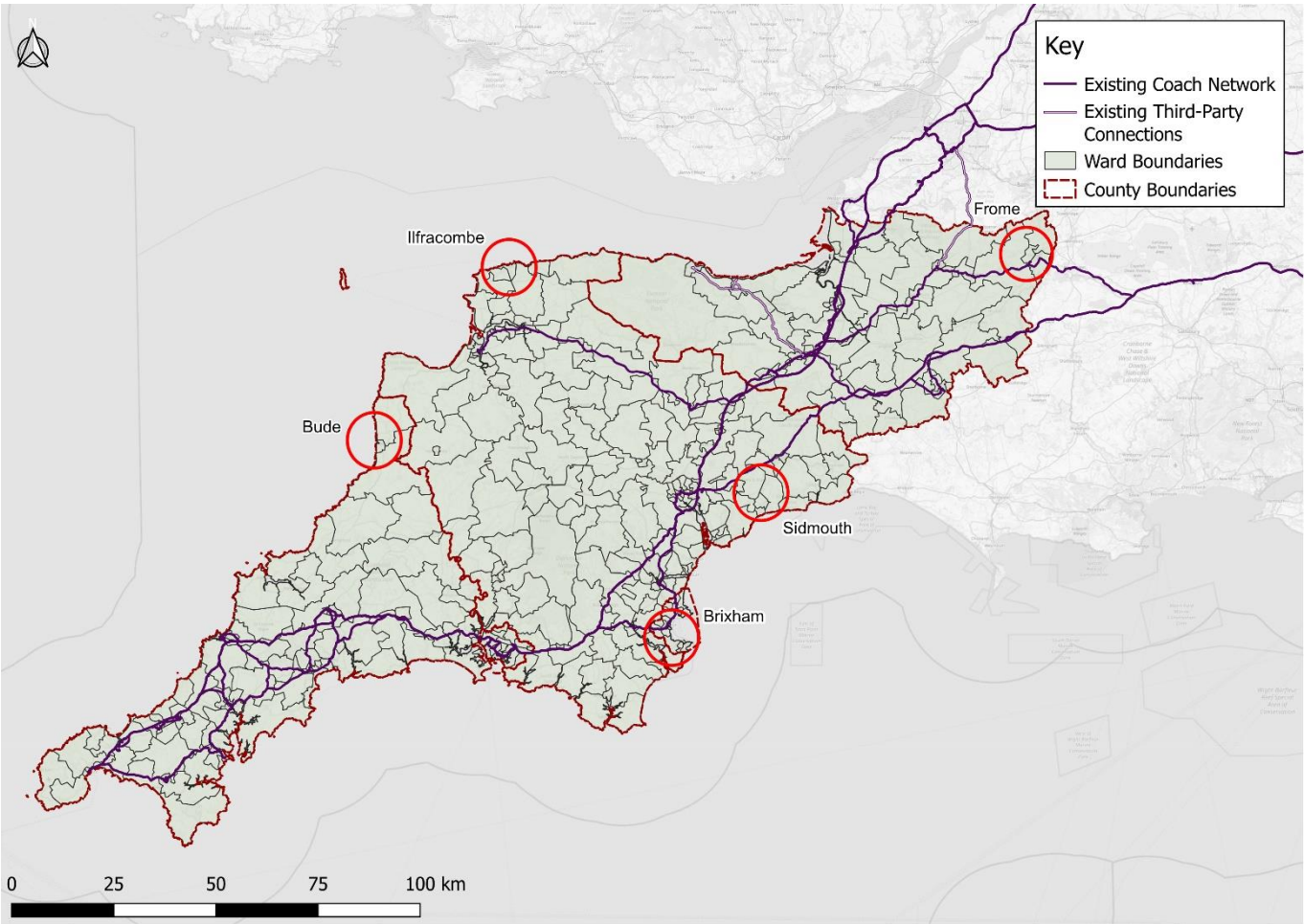
4.3.2 Resulting Opportunities Based on Demographic Data

Further Third-Party Connections

Many of the rural and coastal towns in the Peninsula Region currently lack coach connections and have comparatively high populations without car access. Given the current transport network, lack of car access, and the levels of deprivation observed in some of these areas, there is a risk that accessibility issues are exacerbated by all three of these challenges combining, ultimately limiting personal mobility and wider access to opportunities. For these locations and potential passengers, Third-Party Connections could offer more than just improved access to these locations by public transport. This is particularly relevant in the case of **Bude**, which following service changes earlier in 2025, no longer has a direct bus connection to any of the major towns and cities in the region. Previously, Bude had a direct bus connection to Plymouth.

A Strategic Bus and Coach Network for the Peninsula Region

However, it is acknowledged that many passengers may not wish to travel outside the region and are seeking better connectivity to and from nearby main towns and cities. Whilst Third-Party Connections are one way of supporting connectivity to towns across the Peninsula Region, there is a risk that these could be seen as purely oriented towards longer distance journeys to London, Birmingham, Bristol, and onwards. Therefore, the further development of a Strategic Bus and Coach Network could help to support regional journeys and offer similar positive impacts for areas experiencing low car ownership, poor connectivity, and higher levels of deprivation.

Peninsula Transport are working towards a Strategic Network to support more integrated and straightforward journey planning. Whilst beneficial for all users, this may be particularly supportive for older users, who account for a high proportion of the population in many areas of the region as well as being a key market for the coach industry.

5. Current Gaps in the Scheduled Coach Network

5.1 Methodology

5.1.1 Desktop Review

The initial stage of the Desktop Review involved researching and mapping the current scheduled coach network to understand the locations served across the Peninsula Region and if there are any clear gaps in the network - this highlighted North Devon and North Cornwall as lacking coach provision.

From this, a range of other transport and movement factors were considered. In summary, this included understanding:

- The existing scheduled coach network in more detail (e.g. days of operation, services and frequencies);

- The existing rail network (again considering services and frequencies);

- Road traffic movement across the Peninsula, especially in the context of tourist movements, achieved using the custom methodology already outlined; and

- Existing end-to-end road journey flows from locations in the Peninsula to other parts of the country by analysing BT Mobile Data to understand average daily journeys over a three-month period outside the peak tourist season.

5.1.2 Stakeholder Engagement

The Desktop Review was supplemented by engagement with Local Transport Authorities (LTAs) (primarily at the local town council level) and coach operators who currently operate scheduled services across, to and from the region. This engagement covered both an understanding of where current gaps may exist and how each stakeholder felt scheduled coach services could be improved to fill gaps or make better advantage of the opportunities available.

Each town council within the Peninsula Region was asked to complete an online questionnaire, of which three questions were related to the scheduled express network. These were to understand:

- Whether the respondent organisation felt that the scheduled coach service was sufficient for their council area;

- And if not, why they felt the network was insufficient; and

- Are there any destinations and/or service times where you feel there could be connections to your area by coach that are not served by the current network? (A response was not mandatory for this question).

Microsoft Teams meetings were held with Flixbus, Berry's, and Stagecoach South West (operators of the Falcon service), with key questions to understand:

- Their plans for changes to the existing network;

- Whether they would be open to exploring third-party connections; and

- Opportunities for regional or county-wide links not currently existing, but where a service may be beneficial to the local population.

5.2 Key Findings and Discussion

Based on reviewing the network, it has been possible to identify a series of key locations either unserved or poorly served by the existing coach and rail network, but where there could be opportunities to create better connections. These initial locations are: Bude and Launceston in Cornwall, and Ilfracombe, Tiverton, and Sidmouth in Devon. These locations are shown in **Figure 5-1**.

Figure 5-1 – Suggested opportunities for improved connections in the Peninsula Region
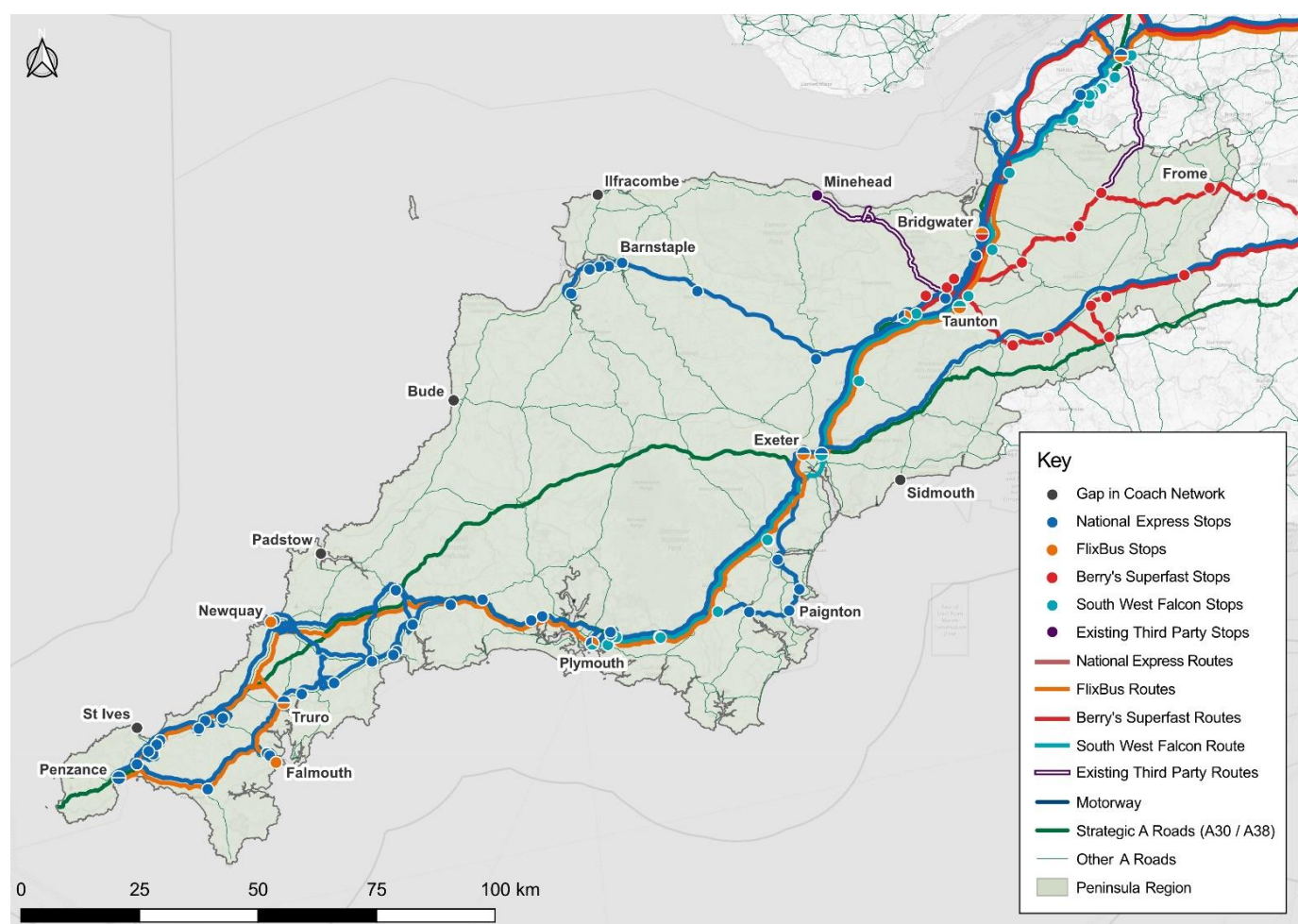
In terms of understanding the reasons behind these gaps, a combination of the Desktop Reviews and Stakeholder Engagement highlighted several themes behind a lack of coach provision:

- A lack of demand for passengers on end-to-end corridors where routes have previously operated, or where a population area cannot justify a coach service due to predicted low demand

- Alternative options being available (e.g. a frequent rail service) – essentially, preventing coach competing with other modes, or existing high-quality bus connections.

- Distance from main long-distance routes (i.e. towns would require a specific service or a lengthy diversion rather than being served on more direct services to other destinations).

- Other operational and geographical factors, such as a poor local road network to reach stops / facilities (e.g. challenges with congestion), or the need to ensure collaboration for longer distance, regional connection.

5.2.1   Lack of Demand

For a connection on the coach network to be viable, there must be sufficient demand to operate a direct service, however, lower levels of demand may be satisfied with a third-party connection using existing local bus infrastructure to meet coaches at interchange points. Some of the larger distances between population areas flagged as being conducive to new or additional coach services, especially in North Devon and North Cornwall, present issues relating to unrealistic journey times. Through the stakeholder engagement process, Stagecoach highlighted that the current gaps that exist in the coach network across the Peninsula Region highlight where there is either no viable passenger volume currently or where past service provision has been withdrawn due to a lack of use. It was highlighted that there is a desire to have a connection from North Cornwall, but as evidenced by the withdrawal of the National Express 503, services are not always well used when they are provided and are therefore discontinued because of commercial losses.

However, levels of demand may change with the recent uplift in housing development and growth agendas set by the Labour Government with the updates to the National Planning Policy Framework, and the population across the region is expected to increase by over 10% by 2040.

Local Authority Name	Housing supply under the previous standard method	Housing support under the new standard method	Average Annual Net additions (2021/22-2023/24)
Cornwall	2,707	4,421	2,650
East Devon	893	1,188	881
Exeter	642	800	599
Isles of Scilly	-	-	0
Mid Devon	346	572	329
North Devon	See Joint Plan	803	522
Plymouth	See Joint Plan	1,290	324
South Hams	See Joint Plan	910	582
Teignbridge	717	1,090	567
Torbay	599	940	258
Torridge	See Joint Plan	526	306
West Devon	See Joint Plan	443	309
Somerset	2,669	3,769	2,761
Plymouth, South Hams, West Devon	1,519	2,643	1,215
	10,092	19,395	11,303

5.2.2 Alternative Solutions

The rail network offers a range of services across the Peninsula Region, and are detailed in **Appendix A**. The Great Western Main Line offers long-distance services from major towns and cities in Devon and Cornwall to Bristol, London, Birmingham, and the North. Several branch lines interchange with the route at key stations, including Newton Abbot, Exeter St Davids, Plymouth, and Truro. Most rail services operate at a regular frequency, typically either half-hourly, hourly, or two-hourly (with more frequent services operating where routes combine).

Within the region, there are a range of local and 'inter-urban' bus services connecting towns and cities which could act as viable alternatives to the scheduled coach network. The largest operators in the region are First Bus, Stagecoach South West, and Go Cornwall Bus (Go-Ahead Group).

The towns identified as being key locations that currently lack a coach service have existing links to and from areas where other public transport services may be available. as illustrated in **Table 5-1**, some of these locations have relatively frequent services to and from main towns or locations on the existing coach network.

Table 5-1 – Main bus connections to/from towns identified as lacking coach services

Town	Service	Route	Journey Time	Frequency	Operator
Bude	6	Bude - Okehampton	1hr 10mins	5 buses per day	Stagecoach South West
Wadebridge	11	Bodmin Parkway – Wadebridge – Padstow	30mins to Bodmin Town Centre	1 bus per hour	Go Cornwall Bus
Padstow	11	Bodmin Parkway – Wadebridge – Padstow	1hr to Bodmin Town Centre	1 bus per hour	Go Cornwall Bus
Ilfracombe	21B	Ilfracombe – Barnstaple Rail Station	55mins	2 buses per hour	Stagecoach South West
Tiverton	1 / 1A	Tiverton – Cullompton – Exeter	1hr 15mins to Exeter 30mins to Cullompton	2 buses per hour	Stagecoach South West
Tiverton	55	Tiverton – Exeter	40mins	2 buses per hour	Stagecoach South West
Tiverton	355	Tiverton – Exeter	1hr 5mins	7 buses per day	Stagecoach South West
Sidmouth	9 / 9A	Honiton / Seaton – Sidmouth – Exeter	55mins	2 buses per hour	Stagecoach South West

5.2.3 Distance to Main Routes & Geographical Features

For coach services to benefit passengers, and to compete with long distance rail services, it is necessary to ensure that services use the most direct routes possible and avoid penalties to journey times for longer distance passengers.

An example to consider in the South West is the Stagecoach South West Falcon service, which instead of calling at bus stops in town centres will call at stops as close as possible to main A38 / M5 motorway junctions between Plymouth and Bristol Airport. The stops served are typically either fixed Park & Ride (such as Honiton Road Park & Ride in Exeter) or have become more informal locations, such as at Drumbridges and Cullompton. Engagement with Stagecoach highlighted that this balanced approach was part of the passenger appeal for the South West Falcon service as customers would be able to join the service relatively easily along the route, but without detriment to passengers travelling longer distances between Plymouth and Bristol / Bristol Airport. There could be options to consider this approach for other locations and routes (with interchange to third-party services): this would help encourage more people onto the network, but without extending journey times significantly for existing passengers.

However, the overall coach network offer focusses on towns and cities adjacent to main A38 corridor between the M5 and Bodmin, then continuing along the A30 further into Cornwall. Whilst dualling of the A30 to near Penzance has recently been completed, these through routes do not fully benefit towns in North Devon and North Cornwall, including Okehampton and Launceston. With these upgrades completed, coach journeys could be made faster. Equally, with the new Okehampton Interchange planned to open in 2026 adjacent to the A30, this could help to support the viability of routes using the northern A30 route towards Cornwall, whilst improving connectivity for the north of the region.

A fine balance must be reached when considering connecting towns to the network: any 'diversion' off the SRN/MRN must be justifiable for the number of passengers For many areas identified as having poor connectivity, it would likely be necessary to operate a specific connection that may not be commercially viable. However, the existing road network away from these corridors and between towns in the region can be challenging. Stagecoach cited that routes through East Devon were particularly challenging, where a busy single carriageway network can often impact scheduled services by reducing reliability and/or increasing journey times, thus losing the appeal of road based public transport.

For the bus network, funding connections is a key consideration. Unlike the coach network, which is run entirely commercially or with funding from external partners, routes registered as 'local bus services' can potentially benefit from a range of public funding streams. Government schemes relevant to bus improvements are:

- Bus Service Operators Grant (BSOG) – a grant paid to operators to assist in recovering some fuel costs, to support lower fares and enable operators to run services that otherwise might be unprofitable.

- Bus Service Improvement Programme (BSIP) funding – allocated to local authorities to enable delivery of strategic improvements to the bus network: this can include new routes, additional services, or improvements to facilities.

Stagecoach highlighted that when new bus routes are added to the network, typically funding is provided for the first two-years, then the route will either be funded commercially or, if the growth is continuing but

not viable enough to be fully commercial, the LTA will then continue to fund the service on a reducing scale. When considering cross-border services, Stagecoach noted challenges around the need to cooperate with other LTAs, which can potentially delay and complicate the implementation of improvements.

6. Making Coach Journeys Easier

6.1 Overview

The 'Easier Journeys' priority workstream of the Peninsula Transport Strategy is focussed on facilitating improved integration between the bus, coach, and rail network. Peninsula Transport are looking to undertake this through the facilitation of a single ticket across bus, coach, and rail services, with the specific aim of improving the attractiveness and connectivity of the public transport network in the South West - enabling users to travel on a single ticket across multiple modes.

6.2 Third-Party Connections?

The simplest way to expand the coach network without needing to provide significant resource (e.g. new routes and additional vehicle resources and cost) is to consider how the existing local and 'inter-urban' bus network can help to support the coach network by feeding passengers to it at recognised interchange locations.

Across the Peninsula Region, as identified earlier, there are generally good bus connections, with most services in each area run by a single operator. However, some areas are served by more than one operator, though these occurrences are typically at the boundaries between different operator networks.

With a simplistic local bus network in operation across large parts of the region several third-party connections could feasibly be created with limited impact on current bus services. Impact does not just consider a need to change routes or timetables; it can also consider reducing the potential competition of between coach and bus. This further positive benefit of Third-Party Connections over the creation of new routes was highlighted during the engagement session held with Berry's Coaches.

Third-Party Connections would be most effective where bus services are generally frequent, however, in the coach context where service frequencies are low due to the long-distance nature of the routes, a minimum of hourly bus service would be suitable for passengers' making connections to and from coach.

6.3 Considerations for Third-Party Connections

Improvements to ticketing would not only be attractive to passengers, but also to operators. National Express cross-selling highlights opportunities for improving the through journey experience for passengers, both in the context of a single ticket, but also a single journey schedule being available to passengers when purchasing their tickets. This could be seen as a model system for passengers and operators alike.

Besides difficulties with the need to collaborate with multiple operators, several challenges either remain, or could be presented going forward with a multi-operator / single ticket approach. These are listed in **Table 6-1**.

Table 6-1 – Considerations for Third-Party Connections

Consideration	Current Situation	Suggested Actions
Waiting Time	On occasions, connections can work well with limited waiting times for passengers. However, the situation varies. To connect into some journeys, passengers may be required to wait 30 minutes (or less), but in other cases, passengers may be required to wait over an hour. Given the limited frequency and irregular timetables of many coach services, it is understandable that it is not always possible for connections to be seamless.	• Consider retiming irregular bus services to offer smoother connections to the coach network, by ensuring bus operators work with scheduled coach providers. *For example, Berry's Coaches have already highlighted an interest to work with operators (including First Bus) to coordinate timetables through an operators' forum.*
Journey Times	The rural nature of the Peninsula Region (especially considering North Devon and North Cornwall) can lead to long distances between main population centres, and this may be a less desirable journey by bus owing to the number of stops and speed of travel (essentially, the same challenge considered when considering coach routes).	• When looking to add third-party connections to the network, the 'bus' journey time should be considered to understand if routes proposed are direct enough (in time and distance) to be attractive to users who then connect to/from a coach service.

Distance between Interchange Stops	The interchange between coach stopping points and those of local and inter-urban bus services (i.e. potential 'third-party connections) vary significantly across the region, as seen by these examples:
	
	Penzance • Coaches serve the exiting Bus Station.
	Plymouth • Coaches serve the dedicated Coach Station in the City Centre.
	           • Most buses serve / terminate at Royal Parade, a short walk from the Coach Station.
	Taunton • National Express serve stops adjacent to the County Hall; FlixBus and the Falcon serve a stop at the BP Garage adjacent to the M5.
	           • Some buses serve the County Hall, though many (including the existing third-party Service 28) serve Castle Way, approximately 250m from the County Hall.
		• When looking to add third-party connections to the network, consider stopping points for services. Ideally, the 'third-party' connection could stop close, though understandably this is not always possible.
		• Where a same-stop connection is not possible, consider improvements to the connection between stops (e.g. dedicated / improved wayfinding).

Facilities	Outside of major towns and cities, passenger facilities can be limited. For example, in many cases coach passengers wait at bus stops with little or no additional information about the coach service being caught as this is normally provided electronically with their travel documents. This creates problems for those without access to mobile technology or in areas of poor signal coverage. Facilities on vehicles themselves should also be considered. Currently, several of the buses operating on the 28 service between Minehead and Taunton feature luggage racks, making it possible to travel with luggage without major inconvenience when compared to conventional bus services, where the stowage of larger items may be more challenging for passengers and operators.	• When looking to add third-party connections to the network, review the facilities at stops to improve passenger experience and help to promote services. For example, consider the use of promotional bus stop wraps or vehicle liveries, as already exists on various partnerships with Great Western Railway. • Understand whether appropriate facilities are provided on-board vehicles for passengers, particularly in respect of luggage space. Given the tourism appeal of the region, providing dedicated vehicles fitted with luggage racks on some routes, for example, may help to enhance the service provision and make it more suitable for coach passengers.
Ticketing	The current variation in ticket types can cause issues for drivers, particularly when coach passengers may have a paper, SMS, email or QR code ticket type.	• Look to create a single QR code ticket that can be generated and accepted by all modes / operators. This would require coordination and appropriate equipment in place (for example, Stagecoach highlighted that whilst not an option immediately, they have an internal pathway to implementation). However, this does align with Peninsula Transport's Strategy, and vision for One Ticket, One Journey.
Passenger Perception	To date, much of the STB's engagement around coaches has focussed on operator, industry and transport authority needs. However, as changes are made to the existing network moving forward, operators and the STB would benefit from understanding experiences and perceptions of coach, gaining insights from both current and non-users of coach.	• Look to understand the current opinions of passengers and how / where services or connections could be improved to the network (e.g. through Passenger Perception Surveys). • Consider involving passengers in planning stages for upgraded services to help understand their needs, and where services / facilities can be improved.

7. Future Opportunities for A Connected Peninsula

7.1 Connecting Key Gaps in the Network

Several towns have previously been identified that could benefit from improved connections to the existing transport network, where coach could have most potential as a long-distance mode, either due to lack of rail connectivity or where rail may not always offer the most direct routes.

7.1.1 Identifying Potential Network Improvements – The Optioneering Process

To identify the most suitable connections, and those which would have little to no "passenger facing" changes required to the existing service, an optioneering process was undertaken based on the suitability of individual services. This considered a range of bespoke criteria, which were tailored to the context of the existing coach network and wider geography of the South West. These criteria are detailed in **Table 7-1**.

Table 7-1 – Criteria for Optioneering Process

Consideration	Criteria	Score
1. Interchange Location and Quality Total 4 points	Quality of Interchange	0, 1 or 2 points per criterion
	Level of Work Needed	0, 1 or 2 points per criterion
2. Third-Party Connection Service Provision Total 5 points	Evening Service Frequency	0, 0.5 or 1 point per criterion
	Sunday Service Frequency	0, 0.5 or 1 point per criterion
	Level of Work Needed for Timetable / Route	0, 0.5 or 1 point per criterion
3. Population Reach Total 2 points	Estimated Population Reach (considering main towns / villages only)	0, 1 or 2 points

7.1.2 Outcomes of Optioneering Process, and Key Actions for Improvement

Whilst the full region was considered, the tourism, demographic, and BT Mobile Data identified a series of locations for improvements, listed in **Table 7-2**, and mapped in **Figure 7-1**. In this table, listed against

each location, are a series of suggestions for key actions that could be taken forward based on the existing opportunities to connect them to coach. Further detail on the context of each location, and current transport situations, can be found in **Appendix C**. Detail of the scores given to each route against the categories listed in **Table 7-1** can be found in **Appendix D**.

Services have scored highly overall when they have frequent journeys, an existing high-quality interchange with the coach network, and can reach at least one small to medium sized town / large village. Though this optioneering comes with the caveat of not having access to passenger data (and so longer distance journeys may not have significant demand), that does not mean to say that the addition of these third-party connections would not look to attract users to coach, who may not have considered it previously.

12 potential routes were scored (as listed in **Appendix D**). Many of these received at least 80% of the points available. These high scores indicate that it would be possible for these routes to be brought onto the third-party network with little impact on the existing service.

Table 7-2 – Key Actions for Improving the Existing Network

Locations	Area	Journey Time to Existing Network	Suggested Key Action(s)			
			Introduce Third-Party Connection	Improved Promotion of Existing Connection	Consider improvements to Facilities	Consider addition to possible 'Strategic Bus and Coach Network'
Bude	Cornwall	1hr – 1hr 10mins (Stagecoach Service 6 to Okehampton Railway Station)		✓ to Rail network at Okehampton, via Service 6		
Padstow and Wadebridge	Cornwall	55mins / 30mins (Go Cornwall Bus Service 57 from Padstow / Wadebridge to Bodmin)	✓			
St Ives	Cornwall	20mins (First Kernow Service 17 / 17A to St Erth)	✓			
Redruth and Camborne	Cornwall	40mins / 1hr 10mins (First Kernow Tinner Service T1 / T2 from Redruth / Camborne to Truro)	✓			✓
Ilfracombe	Devon	50mins – 1hr (Stagecoach Service 21B to Barnstaple)	✓			
Sidmouth, Honiton and Seaton	Devon	1hr / 1hr 35mins / 1hr 30mins (Stagecoach Services 9 / 9A from Sidmouth / Honiton / Seaton to Exeter)	✓		✓ at Honiton Road Park & Ride	✓
Bideford	Devon	30mins (Stagecoach Service 21 / 21A to Barnstaple)	✓			
Tavistock	Devon	55mins (Stagecoach Service 118 to Okehampton Railway Station) 1hr 10mins (Stagecoach Service 1 to Plymouth)	✓ to Coach network at Plymouth, via Service 1	✓ to Rail network at Okehampton, via Service 118		

Accessibility Gap Analysis
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Ivybridge	Devon	40mins / 20mins / 45mins / 1hr 5mins (Stagecoach Service 80 to Plymouth / A38 Marley Mansion, for Falcon / Totnes / Paignton)	✓		✓ at Marley Mansion	✓
Brixham	Torbay	20mins (Stagecoach Service 12 to Brixham)	✓			✓
Burnham-on-Sea	Somerset	40mins (First Bus 21 to Bridgwater)	✓			✓
Frome	Somerset	55mins – 1hr 10mins (First Bus D2x / D2 to Bath) 1hr 20mins (Faresaver X34 to Chippenham)	✓			
Yeovil	Somerset	1hr 45mins (First Bus 54 to Taunton)	✓			

Note: Highlighted rows indicate the location(s) that have been identified as a priority for improvements

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Figure 7-1 – Map showing proposed Third-Party Connections in the Peninsula Region
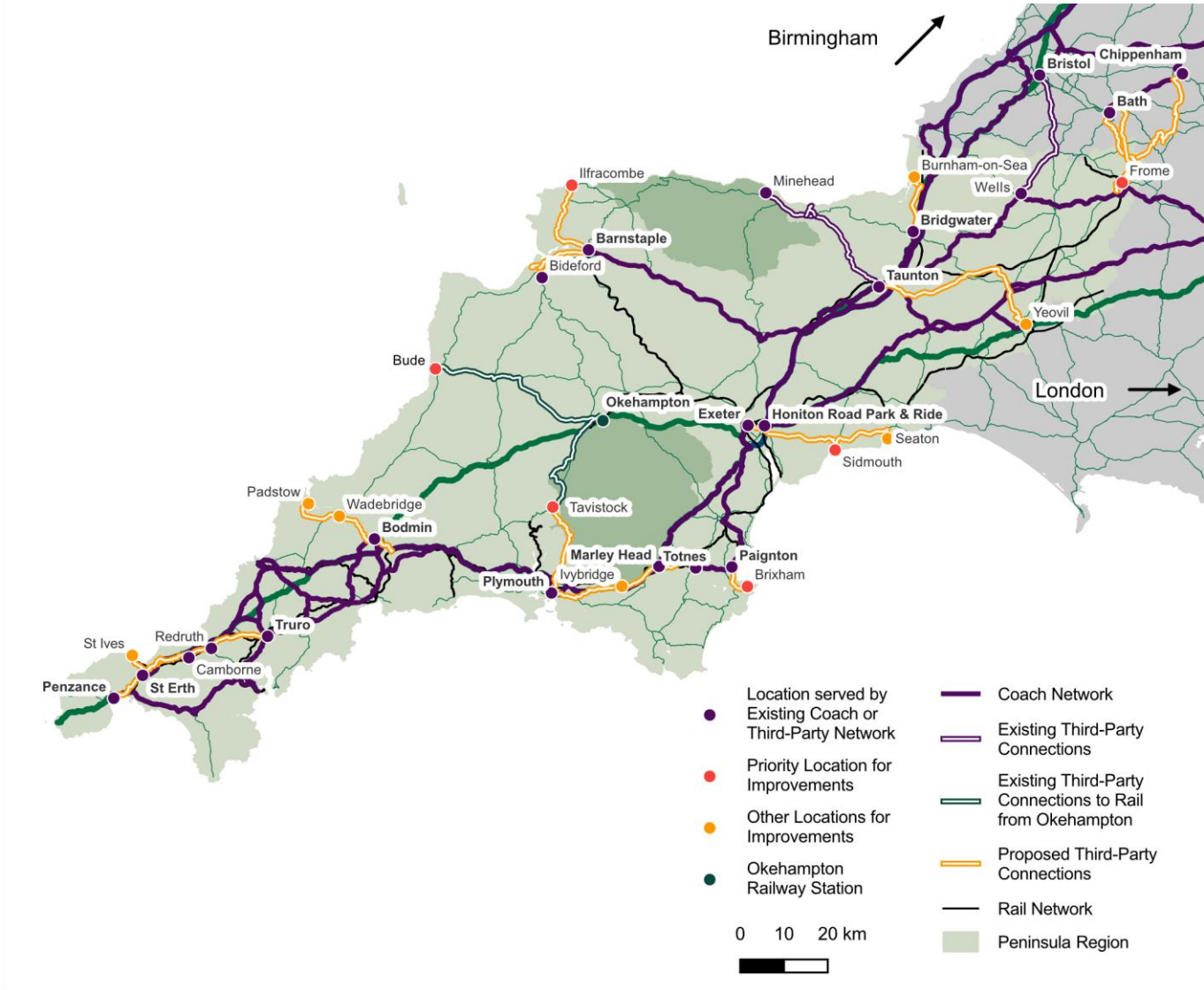
Note: Existing third-party connections to the rail network from Okehampton are shown to highlight potential connections to the A30 corridor, as well as highlight the most suitable option for connecting Bude to the national transport network. These have not been subject to the optioneering process.

Note that in terms of rail connectivity, additional connections to the rail network for the Stagecoach 21 / 21A Barnstaple to Bideford, and 21B Barnstaple to Ilfracombe services should also be considered as an early "quick win" for improvements towards "A Connected Peninsula".

7.1.3 Key Assumptions

Several assumptions have been made as part of the optioneering process. These include:

- Not accounting for passenger flow data within scoring:

  - It is notable from the BT Mobile Data that areas around Padstow and Wadebridge have notable volumes of journeys to and from Greater London, which would suggest that the addition of these locations to the coach network could help improve the uptake of coach for long distance journeys to and from these areas. A further example of this is journeys from the Braunton area (between Barnstaple and Ilfracombe) to Greater London: this area is not currently linked to the coach or rail networks but is served by the existing 21B service (one of the proposed third-party connections).

  - Traffic flow data away from the Strategic Road Network does highlight areas including Barnstaple, Bideford, and Brixham as having a noticeable increase in traffic during the peak tourist season.

- Any costs incurred to provide improved connectivity: this should be considered both in the context of the third-party operator and the scheduled coach operator (including where both services are provided by the same operator, typical of connections to the Stagecoach Falcon service).

7.2 Improved Access to Bristol Airport

7.2.1 North Devon to Bristol Airport – A Potential New Coach Connection?

A currently missing connection highlighted by a number of stakeholders, including Bideford Town Council and Stagecoach, was the opportunity to introduce a connection between North Devon (specifically the Barnstaple / Bideford areas), Tiverton Parkway Railway Station, and Bristol International Airport.

Bristol Airport is currently served by a range of coach services, including:

- The Stagecoach Falcon between Bristol and Plymouth;

- Several National Express routes connecting the Airport to Birmingham, Cardiff, Plymouth and Penzance; and

- The FlixBus 910 service to Cardiff and Swansea

Bristol Airport is not linked to the rail network and so is reliant on a combination of these coach services and specific airport shuttle services to Bristol. The most straightforward connection for passengers travelling into Bristol Airport by rail from the south west would be at Bristol Temple Meads, though this would naturally involve the need to "double-back" on the journey. Therefore, an alternative option for passengers coming from Cornwall could be considered by interchanging at Tiverton Parkway, which is located close to the M5 and already served by all long-distance rail services.

Based on the feedback received, a suggested route could consider connecting:

- Barnstaple / Bideford
- South Molton
- Tiverton
- Tiverton Parkway Station

Then following one of two routes to reach Bristol Airport:

Option 1: following National Express route

- Wellington
- Taunton County Hall
- North Petherton
- Bridgwater Bus Station

  then Bristol Airport

Option 2: following Falcon route

- Chelston
- Taunton BP Garage
- Bridgwater Huntworth Lane

  then Bristol Airport

7.2.2   Park and Fly Options

In addition to potentially considering new links between North Devon and Bristol Airport, opportunities should also be considered to offer, and subsequently promote, "Park & Fly" from existing or future Park & Ride sites to Bristol Airport, with the connection being made by coach. This could be of particular significance for areas in the north of the region, where there are already notable numbers of road journeys each day to Bristol Airport (based on findings from the BT Mobile Data). Alternatively, the M5 / A38 corridor to Plymouth (the Falcon route) could be considered for three reasons: (i) as the Falcon already provides a frequent service to Bristol Airport, (ii) stops are strategically located close to the motorway network, and (iii) engagement with Stagecoach (operators of the service on behalf of Megabus) has highlighted that Falcon stops can be popular for informal Park & Ride already, and as such it is hoped that facilities can be improved for existing and prospective passengers.

Arle Court Park & Ride, Cheltenham, is already offering such connectivity for coach passengers to and from Bristol Airport. With well-regulated, secure parking, and regular coaches to Bristol and Heathrow Airports serving the site, this has provided a viable alternative to driving, thus intercepting journeys earlier and reducing car mileage. Provided sites are well promoted and regulated (Arle Court providing a good example of both), these provide further opportunities to increase coach usage in the Peninsula.

7.2.3   Tiverton Parkway Station

Tiverton Parkway is not served by any scheduled coach services. Its proximity to the M5 Motorway, combined with the rail connection, make this a potential interchange point for Bristol Airport passengers coming from Cornwall, who currently have no direct connectivity to the Airport. Such a calling point on a suggested route from North Devon to Bristol Airport would also provide a direct alternative for passengers travelling from Barnstaple (and the surrounding area) wishing to connect with northbound rail services towards London Paddington, instead of changing trains at Exeter St David's.

7.3 A Strategic Bus and Coach Network for the Peninsula Region

Many of the routes identified as part of the optioneering for third-party connections have potential to form a wider "Strategic Bus and Coach Network" across the Peninsula Region, providing an additional layer of connectivity for towns and cities. By no means would these routes form the complete network, as the Peninsula region has a number of other frequent inter-urban bus connections that could form strategic and direct links along several corridors. This would include several routes to supplement where coach may provide a fast service currently but may not offer direct connectivity (e.g. due to pick up and set down not being permitted at particular locations). Furthermore, these connections have potential to sit alongside the existing rail network to fill gaps between population centres in the region to help build A Connected Peninsula.

The TrawsCymru network presents a strategic regional bus network across Wales (sponsored by the Welsh Government), with a unified brand and numbering scheme that links to the existing rail network through several bus and rail interchanges across the country. The TrawsCymru bus routes offer standard service patterns of hourly and two-hourly across the network.

The regional bus network for the Peninsula has similar potential, even if only through a unified brand and network identity: it does not necessarily need to be the same approach as TrawsCymru (i.e. through a fully branded and sponsored network), there is scope for creating a network of high quality inter-urban routes across the Peninsula.

7.4 Additional Third-Party Connections to Rail – An Alternative to Coach?

Not all locations can be as easily connected to the coach network as they can be to the rail network. In some cases, this is due to local bus provision that does not support the wider coach network. In others, the road network can increase journey time against rail, which isn't influenced by traffic and is often more direct. This reduces the incentive to travel by coach despite the fact it is often cheaper and may take passengers directly to key destinations.

For Bude and Launceston, the most straightforward connections to the wider public transport network can be afforded using rail connections at Okehampton, from where GWR operate an hourly service to Exeter St David's, with a journey time of 40 minutes. Currently, bus connections are already provided and partially supported between Okehampton, Bude / Launceston and Tavistock – these are integrated with trains at Okehampton Station. With the future Okehampton Interchange opening close to the A30 in 2026, there may be opportunities to consider the station supporting future medium-long distance connections for North Cornwall and Tavistock.

Investigation into opportunities for Ilfracombe also highlighted the potential for improved connectivity to rail at Barnstaple by also considering the Stagecoach 21B service. Upon review of the existing connections, the 21 / 21A between Barnstaple and Bideford would provide a third key link between Bideford and the wider transport network, and with a 20min frequency, would not require any significant changes to the existing bus service provision. Addition of these services as third-party connections could be seen as a 'quick win'.

8.   Next Steps

From the datasets analysed (Tourism, Demographic and BT Mobile Data), as well as building an understanding of the existing network, it has been possible to identify a range of next steps that can be adopted to help support the development of the coach network in the region, in line with the Peninsula Coach Action Plan. These actions are listed in **Table 8-1**, and highlight Peninsula Transport's likely role in implementing these actions[22].

Table 8-1 – Next Steps

Theme	Action	Peninsula Transport STB Role	Timescale	Cost
Improved Connections / Supporting the Passenger Experience	Work with operators and other stakeholders to implement additional 'Third-Party Connections', providing better access to several towns across the Peninsula Region identified as 'Priorities for Improvement'.	Facilitator	Short-Medium Term	££
Improved Connections	Further understand key road traffic flows to, from, and within the Peninsula Region. From this, determine the parameters for a possible 'Strategic Bus and Coach Network', drawing upon lessons learned from other regions (including TrawsCymru in Wales).	Researcher	Short Term	£
Improved Connections	Support and work alongside stakeholders to implement new services, particularly a potential North Devon to Bristol Airport coach link.	Influencer / Facilitator	Medium Term	££
Supporting the Passenger Experience	Support and work alongside stakeholders to improve passenger facilities across the region at key interchange points to/from potential 'Third-Party Connections'	Influencer	Medium-Long Term	£££
Supporting the Passenger Experience	Understand passenger experiences and perceptions of coach, including gaining insights from users and non-users of the network to identify opportunities to remove or minimise barriers to travel by coach.	Researcher	Short Term	££

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[22] Roles follow the approach referred to in the Peninsula Coach Action Plan – "Researcher", "Influencer", and "Facilitator"

Appendices

Appendix A – Details of Existing Scheduled Rail Services in the Peninsula Region

Table 8-2 – Detail of existing scheduled rail services in the Peninsula Region

*Note: tph = trains per hour; tpd = trains per day; * indicates Request Stop*

Region	Route	Stations	Standard Service Pattern
Long Distance Connections	Cornish Main Line (GWR / XC)	Penzance / St Erth / Camborne / Redruth / Truro / St Austell / Par / Bodmin Parkway / Liskeard	2tph Plymouth – Penzance *Services typically extend to Bristol / Cardiff / London Paddington / Birmingham and the North East/Scotland*
Long Distance Connections	Cornish Main Line (GWR / XC)	Lostwithiel / Hayle / St Germans / Saltash	1-2tph Plymouth – Penzance
Long Distance Connections	Cornish Main Line (GWR / XC)	Menheniot	1tp2h Plymouth – Penzance
Long Distance Connections	Devon (GWR / XC)	Plymouth	Min. 2tph Main Line Services (North and South) 1tp2h Plymouth – Gunnislake
Long Distance Connections	Devon (GWR / XC)	Exeter St David's	Min. 2tph Main Line Services (North and South) 1tph London Waterloo – Exeter Central / St David's 2tph Exmouth – Paignton
Long Distance Connections	Devon (GWR / XC)	Tiverton Parkway / Totnes	2tph to Plymouth 1tph to Bristol 1-2tph to London Paddington
Long Distance Connections	Devon (GWR / XC)	Newton Abbot	2tph Exmouth – Paignton 1-2tph Long Distance (GWR/XC)
Long Distance Connections	Devon (GWR / XC)	Dawlish	2tph Exmouth – Paignton 1tph Long Distance (GWR/XC)
Long Distance Connections	Devon (GWR / XC)	Ivybridge	1tp2h in each direction

Long Distance Connections	Devon (GWR / XC)	St Budeaux Ferry Road	Limited Service
Long Distance Connections	Somerset	Taunton	2tph to Plymouth 2tph to Bristol 1-2tph to London Paddington
Long Distance Connections	Somerset	Castle Cary	1tp2h London – Exeter St David's
Devon	Avocet Line (GWR)	Exmouth / Lympstone Village / Topsham* / Digby and Sowton / Exeter Central	2tph Exmouth - Paignton
Devon	Avocet Line (GWR)	Lympstone Commando* / Exton / St James Park	1tph Exmouth - Paignton
Devon	Dartmoor Line (GWR)	Okehampton / Crediton	1tph Exeter Central - Okehampton
Devon	Riviera Line (GWR / XC)	Paignton / Torquay	2tph Exmouth – Paignton + additional Long-Distance services to London Paddington / Manchester
Devon	Riviera Line (GWR / XC)	Torre	2tph Exmouth – Paignton + Limited Long-Distance service to London Paddington
Devon	Riviera Line (GWR / XC)	Teignmouth	2tph Exmouth – Paignton + Limited Long-Distance service (GWR/XC)
Devon	Riviera Line (GWR / XC)	Dawlish	2tph Exmouth – Paignton 1tph Long Distance (GWR/XC)
Devon	Riviera Line (GWR / XC)	Dawlish Warren / Exeter St Thomas / Newcourt	2tph Exmouth – Paignton
Devon	Riviera Line (GWR / XC)	Starcross / Marsh Barton / Polsloe Bridge	1tph Exmouth – Paignton
Devon	Tarka Line (North Devon Line) (GWR)	Barnstaple / Crediton / Umberleigh* / Eggesford* / Lapford* / Morchard Road* / Copplestone* / Yeoford*	1tph Exeter Central / St David's – Barnstaple
Devon	Tarka Line (North Devon Line)	Chapelton / Portsmouth Arms / Kings Nympton	Limited Service Exeter Central / St. David's - Barnstaple

	(GWR)		
Devon	Tarka Line (North Devon Line) (GWR)	Newton St Cyres	Limited Service Exeter Central / St. David's – Barnstaple / Okehampton
Devon	West of England Line (SWR)	Pinhoe / Cranbrook / Honiton / Axminster / Crewkerne / Yeovil Junction / Templecombe	1tph London Waterloo – Exeter Central / St David's (via Salisbury)
Devon / Somerset	West of England Line (SWR)	Whimple / Feniton	1tp2h London Waterloo – Exeter Central / St David's (via Salisbury)
Devon / Cornwall	Tamar Valley Line (GWR)	Gunnislake / Calstock / Bere Alston / Bere Ferrers / St Budeaux Victoria Road / Keyham / Dockyard* / Devonport	1tp2h Plymouth - Gunnislake
Cornwall	Atlantic Coast Line (GWR)	Newquay	1tp2h Par - Newquay + *Long Distance services during summer season*
Cornwall	Atlantic Coast Line (GWR)	Quintrell Downs / St Columb Road* / Roche* / Bugle* / Luxulyan*	1tp2h Par - Newquay
Cornwall	Looe Valley Line (GWR)	Looe	1tph Liskeard – Looe
Cornwall	Looe Valley Line (GWR)	Sandplace / St Keyne Wishing Well Halt / Causeland	1tp2h Liskeard – Looe
Cornwall	Looe Valley Line (GWR)	Coombe Junction Halt	2tpd Liskeard – Looe
Cornwall	Maritime Line (GWR)	Falmouth Docks / Falmouth Town / Penmere / Penryn / Perranwell	2tph Truro – Falmouth Docks
Cornwall	St Ives Bay Line (GWR)	St Ives / Carbis Bay	2tph St Erth – St Ives

Cornwall	St Ives Bay Line (GWR)	Lelant	1tph St Erth – St Ives
Cornwall	St Ives Bay Line (GWR)	Lelant Saltings	1tpd St Erth – St Ives
Somerset	Bristol to Exeter Line (GWR)	Bridgwater / Highbridge and Burham	1tph Cardiff – Bristol – Taunton (with some services extending further south)
Somerset	Gloucester – Bristol – Weymouth (GWR)	Frome	1t2ph Gloucester – Weymouth Limited London Paddington – Frome Limited London Waterloo – Yeovil
Somerset	Gloucester – Bristol – Weymouth (GWR)	Bruton / Castle Cary / Yeovil Pen Mill*	1tp2h Gloucester – Bristol – Weymouth Limited London Waterloo – Yeovil

Appendix B – Findings from BT Mobile Data

The following figures illustrate average daily road trips from the Peninsula to a range of destinations outside of the region:

Figure 8-1   Greater London

Figure 8-2   Bristol

Figure 8-3   Birmingham

Figure 8-4   Bristol Airport

Figure 8-5   Heathrow Airport

Figure 8-6   Birmingham Airport

Figure 8-1 – Average Daily Road Trips to Greater London (BT Mobile Data)

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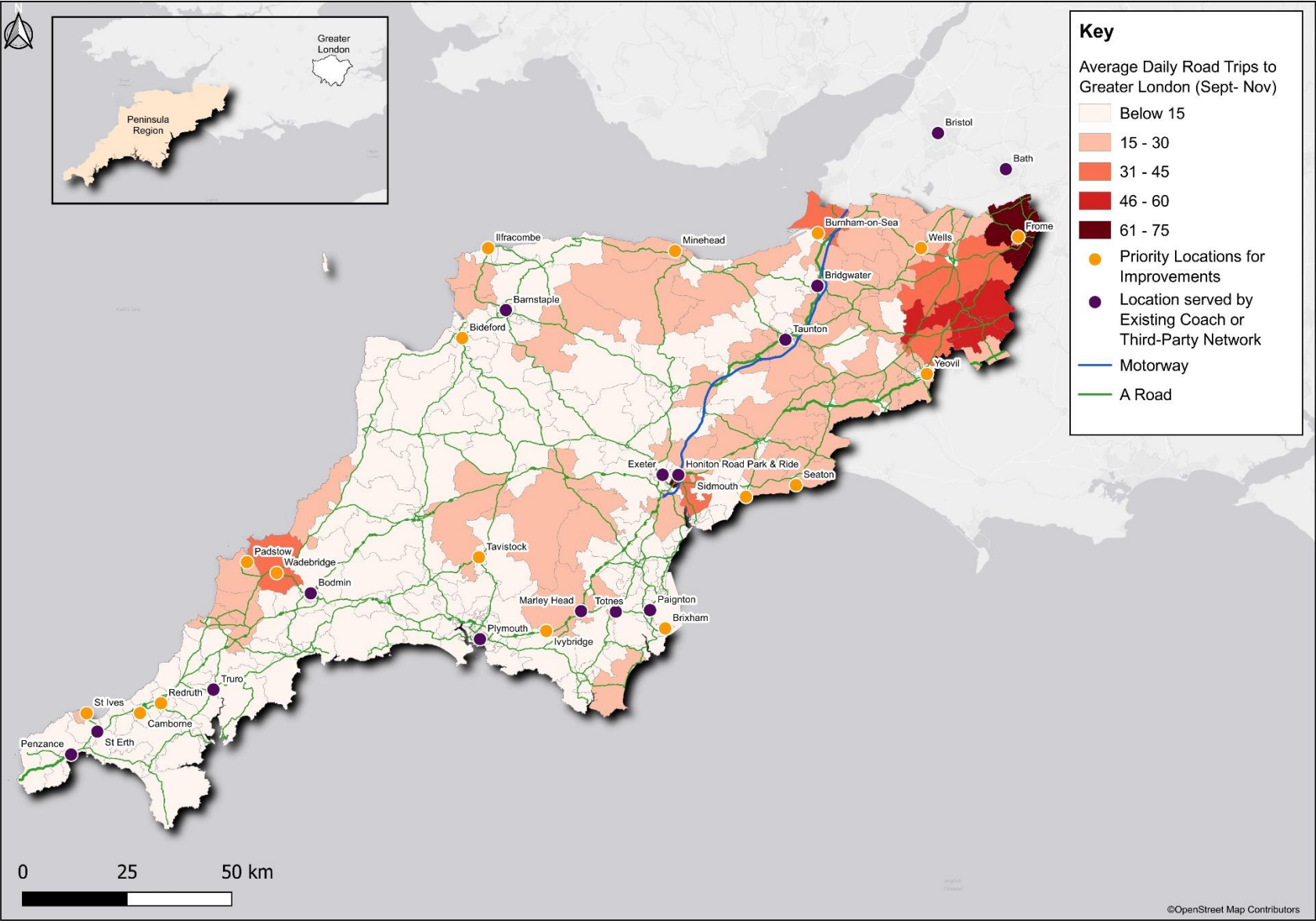
Figure 8-2 – Average Daily Road Trips to Bristol (BT Mobile Data)
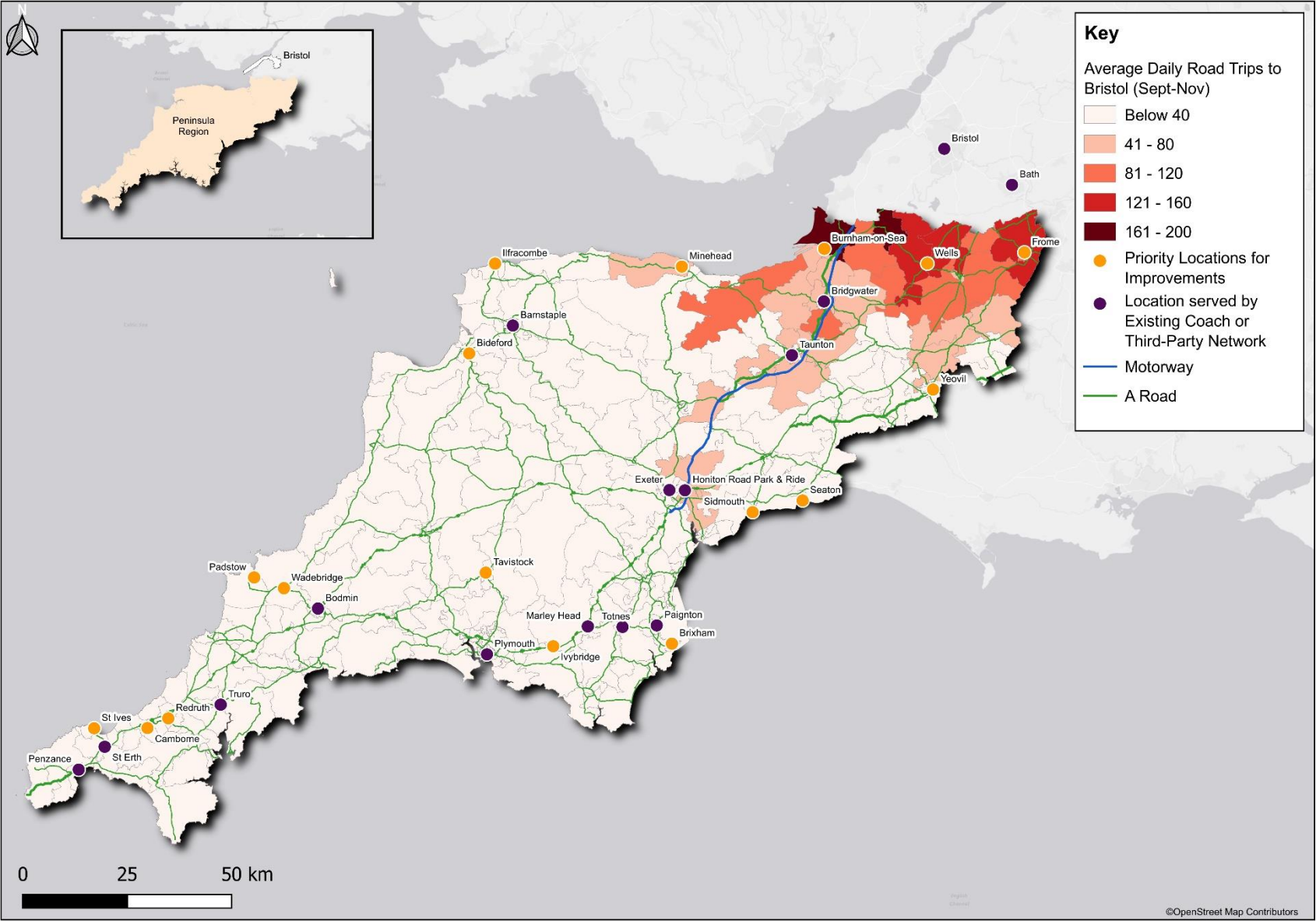
Figure 8-3 – Average Daily Road Trips to Birmingham (BT Mobile Data)

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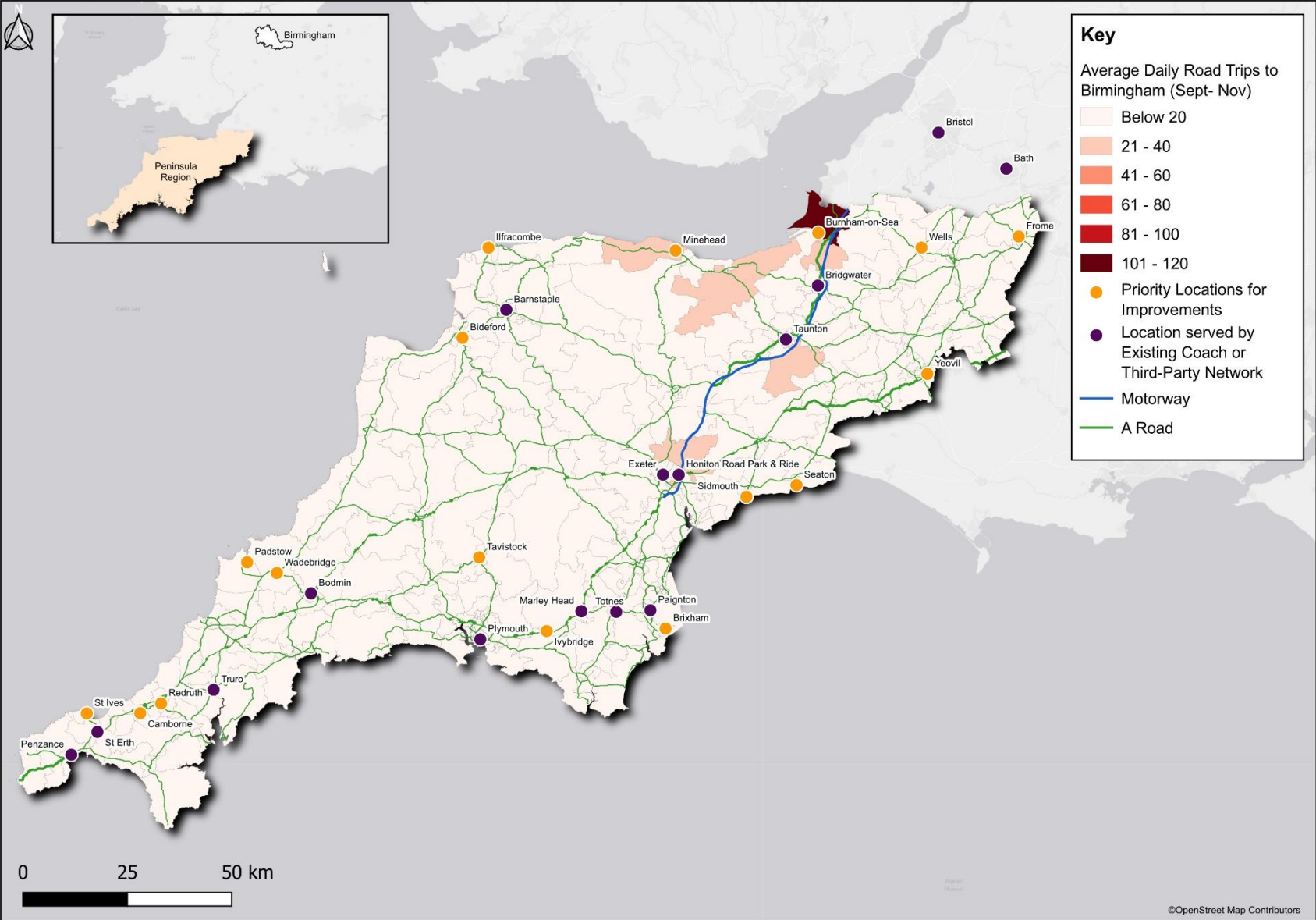November 2025 | **Error! No text of specified style in document.**

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Figure 8-4 – Average Daily Road Trips to Bristol Airport (BT Mobile Data)
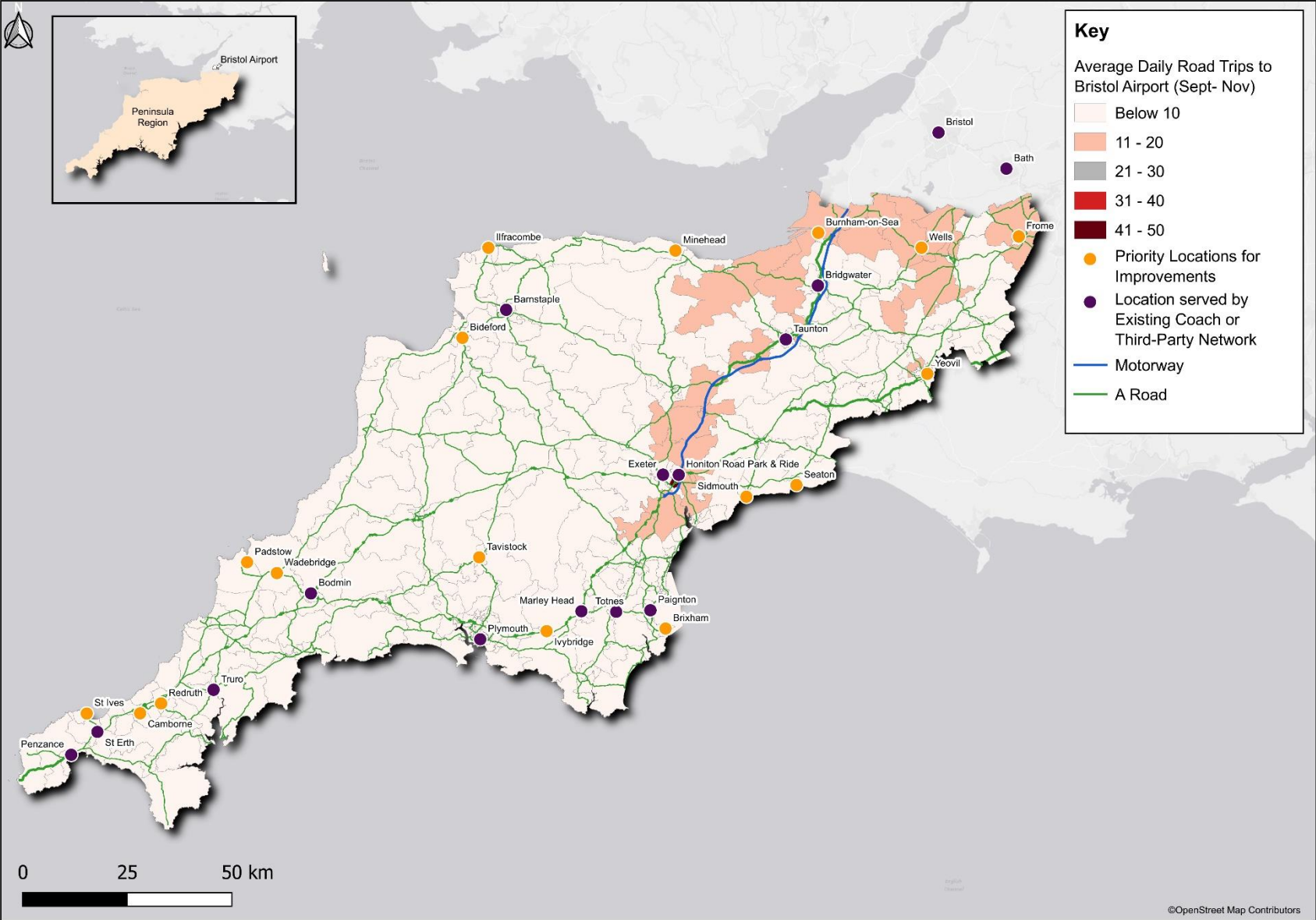
Figure 8-5 – Average Daily Road Trips to Heathrow Airport (BT Mobile Data)
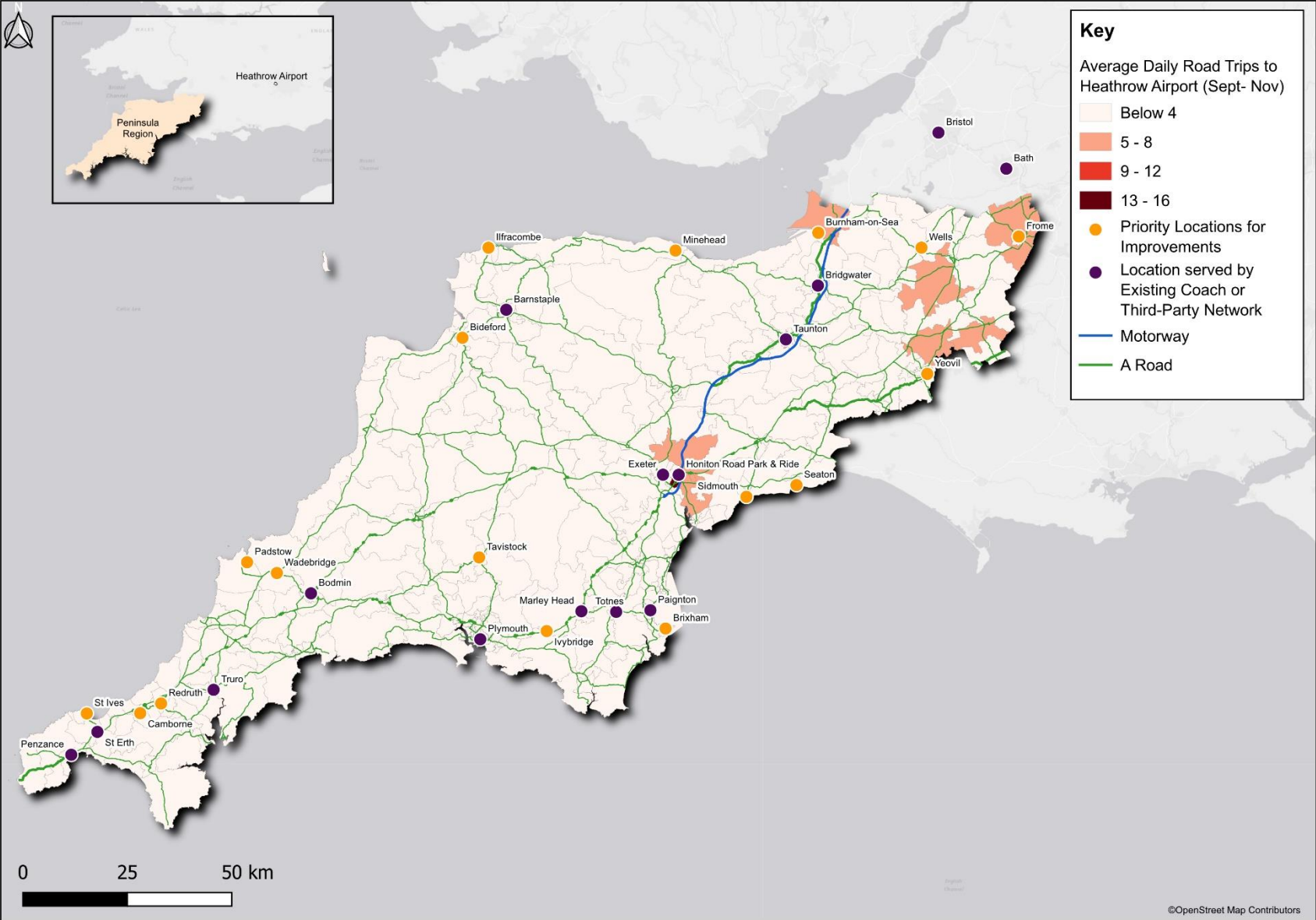
Figure 8-6 – Average Daily Road Trips to Gatwick Airport (BT Mobile Data)
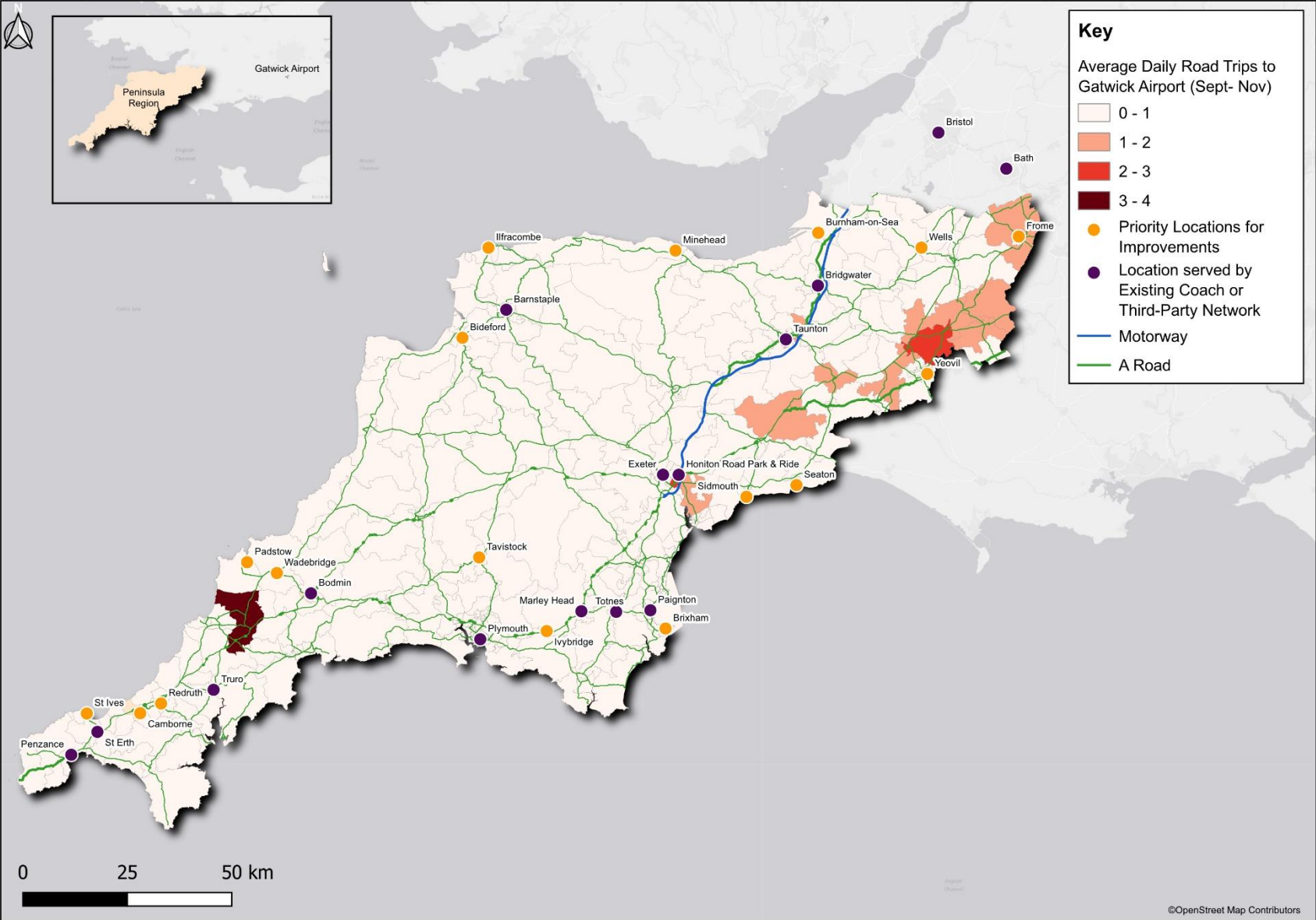
Appendix C – Detail of Current Transport Situation and Suggested Actions

Table 8-3 – Detail of Current Transport Situations and Suggested Actions

Location	Context	Current Transport Situation		Suggested Actions
		Existing Connections / Services	Journey Time	
Priority Locations				
Bude	Bude, Cornwall, is approx. 20 miles north of Launceston (Cornwall), 30 miles west of Okehampton (Devon), and 50 miles north of Plymouth (Devon). Previously, Bude could have been connected at Launceston for the (currently withdrawn) National Express 503 service. Following changes to the Cornwall network, Bude is also no longer directly connected to Plymouth, instead requiring changes at both Launceston and Callington, though these have been timed such that there is a 5-minute connection at each location.	Bude no longer has a single-journey connection to the coach network. However, Bude is connected to Okehampton Railway Station via Stagecoach Service 6 (5 return journeys Monday-Saturday, 3 return journeys Sunday). Through rail tickets are already available.	Bude to Okehampton – 1hr – 1hr 10mins	• Look to further promote the existing Stagecoach Service 6 connection to Okehampton, improving the service where possible.

Ilfracombe	From Barnstaple to the north and east, coach offers the fastest journey times over rail. Taunton can be reached in 1hr 40mins by coach (comparable to in-vehicle time via rail; this does not include connection time). Ilfracombe, Devon, is approx. 12 miles from the rail and coach network at Barnstaple.	Stagecoach Service 301 is already part of the rail network, with 10 return journeys Monday-Saturday (3 return journeys Sunday). Stagecoach Service 21B operates half-hourly during the day, and hourly evenings and Sundays. These provide reasonable connections with trains at Barnstaple, and the majority of current coach services operating on the National Express 502 London - Bideford service. The service also serves Braunton (population 7,000) and RM Chivenor.	Ilfracombe to Barnstaple (Service 301) – 50mins Ilfracombe to Barnstaple (Service 21B) – 50mins – 1hr	• Look to add Stagecoach Service 21B as a 'Third-Party Connection' to both the coach and rail networks at Barnstaple, in addition to the existing connection to rail via Stagecoach Service 301.
Bideford	Bideford, Devon, is approx. 10 miles south west of Barnstaple. Currently, 2 of the 3 National Express 502 services continue from Barnstaple onto Bideford. However, there is no through ticket connection from Bideford to the rail network at Barnstaple, despite bus services calling at the station.	Stagecoach Service 21 / 21A offers a 20min frequency service during the day, with a less frequent service during evenings and Sundays. Based on the current timetable, it would be possible to connect on weekdays into the coach journeys terminating / starting at Barnstaple, as well as late evening arrivals on Saturdays and Sundays. This could also form a feasible third-party connection into any further developments to the coach network in north Devon.	Barnstaple to Bideford – 30mins	• Look to add Stagecoach Service 21 / 21A as a 'Third-Party Connection' to both the coach and rail networks at Barnstaple.
Sidmouth, Honiton and Seaton	Sidmouth and Honiton, Devon, are approx. 15 miles east of Exeter. Seaton,	Stagecoach Service 9 / 9A offers a combined half-hourly service during the day Monday to Saturday between	Exeter to Sidmouth – 1hr	• Look to add Stagecoach Service 9 / 9A as a 'Third-Party Connection'

	Devon, is approx. 20-25 miles east of Exeter. All three towns could be connected with the South West Falcon or National Express networks at either Honiton Road Park & Ride (to the east of the city) or in Exeter City Centre.	Exeter and Sidmouth, with hourly extensions to Honiton (9) and Seaton (9A). Hourly 9A services operate between Exeter and Seaton during Sunday daytimes. Hourly evening services operate between Exeter and Sidmouth.	Exeter to Seaton – 1hr 35mins Exeter to Honiton – 1hr 30mins	to the coach network, including to the South West Falcon at Honiton Road Park & Ride and in Exeter City Centre. • Work with relevant authorities and stakeholders to consider opportunities to improve facilities at Honiton Road Park & Ride for the benefit of passengers interchanging at the site to / from the coach network. • When considering opportunities for a 'Strategic Bus and Coach Network' for the Peninsula Region, look to incorporate the Stagecoach 9 / 9A service, given its frequency and connectivity in East Devon.
Other Locations identified for improvement				
St Ives	St Ives, Cornwall, is approx. 7 miles from St Erth, the main coach and mainline rail	First Kernow Service 17 / 17A currently operates half-hourly during the day (hourly evenings and Sundays)	St Erth to St Ives – 20mins	• Look to add First Kernow Service 17 / 17A as a 'Third-Party

	interchange for the town. St Ives is currently the largest town in West Cornwall without any coach connections currently. St Ives is currently connected by rail with a frequent service to St Erth but is no longer part of the coach network: all services instead continue to Penzance.	between Penzance, St Erth and St Ives.		Connection' to the coach network at St Erth.
West Cornwall	West of Plymouth, National Express routes split and generally follow one of two routes to reach Penzance: • To the north via Newquay, Redruth, Camborne, Hayle, St Erth and Crowlas (Service 106 to Birmingham, and the overnight Services 406 to London and 106 to Birmingham). Newquay is also served by 2 daily 504 services to London. • To the south via Truro, Penryn, Falmouth and Helston (Services 504, and overnight 404, to London).	First Kernow Tinner Services T1 / T2 provide a backbone connection through the county, connecting Penzance and St Erth / St Ives, Camborne, Redruth and Truro on a combined 15-minute frequency during the day Monday to Saturday. Whilst not necessarily attractive for passengers travelling from Truro to St Ives, a viable connection could be offered for Redruth and Camborne, where early / late services are also available on the Tinner to/from Truro Bus Station.	Truro to St Ives – 2hrs Truro to Redruth – 40mins Truro to Camborne – 1hr 10mins	• Look to add First Kernow Tinner Services T1 / T2 as a 'Third-Party Connection' to the coach network. • When considering opportunities for a 'Strategic Bus and Coach Network' for the Peninsula Region, look to incorporate the Tinner services, given their frequency and connectivity in West Cornwall.

Padstow and Wadebridge	Padstow, Cornwall, is approx. 16 miles north west of Bodmin. Wadebridge, Cornwall, is approx. 8 miles north west of Bodmin. Bodmin is the closest connection to the coach network for both towns. However, based on current stopping arrangements, a 3	Go Cornwall Bus Service 57 operates hourly between Bodmin and Padstow via Wadebridge during the day and could offer a viable connection to at least some of the coach services passing through Bodmin. This service also continues to Bodmin Parkway Railway Station, from where through rail tickets are already available to Padstow and Wadebridge.	Bodmin to Wadebridge – 30mins Bodmin to Padstow – 55mins	• Look to add Go Cornwall Bus Service 57 as a 'Third-Party Connection' to the coach network from Bodmin. • Look to further promote the existing connection from Bodmin Parkway, improving the service where possible.
Tavistock	Tavistock, Devon, is approx. 15 miles north of Plymouth. Located on the edge of the Dartmoor National Park, no strategic or major routes pass through the town. The nearest railway stations are at Gunnislake, Okehampton or Plymouth.	Stagecoach Service 118 connects Tavistock with Okehampton Railway Station, with 6 return journeys Monday to Saturday (3 return journeys Sundays). Through rail tickets are already available. *Note: other trips on Service 118 operate to Okehampton Hospital via the Town Centre, not serving the Rail Station.* Stagecoach Service 1 operates generally every 20-30mins between Tavistock and Plymouth, with an hourly evening and Sunday daytime service.	Tavistock to Okehampton (118) – 55mins Tavistock to Plymouth (1) – 1hr 10mins	• Look to further promote the existing Stagecoach Service 6 connection to Okehampton, improving the service where possible. • Look to add Stagecoach Service 1 as a 'Third-Party Connection' to the coach network from Plymouth.
Ivybridge	Ivybridge, Devon, is located approx. 12 miles east of Plymouth, along the A38 Devon Expressway. The town is currently served by a single National Express	Stagecoach Service 80 connects Ivybridge with Plymouth, Totnes and Paignton, and also calls at Marley Mansion (where connections can be made to the South West Falcon). This route follows the line of the A38, but	Ivybridge to Plymouth – 40mins Ivybridge to Marley Mansion – 20mins	• Look to add the Stagecoach 80 service as a 'Third-Party Connection' to the coach network, especially to the South

	journey to/from London in each direction and has a station on the main line between Exeter and Plymouth. Most services operate between Exeter and Penzance only, with some services calling on journeys to/from London Paddington.	unlike coach services, serves settlements on the parallel local road. This service operates half-hourly during the day Monday to Saturday, with an hourly evening and Sunday daytime service.	Ivybridge to Totnes – 45mins Ivybridge to Paignton – 1hr 5mins	West Falcon. This could help connect the Falcon to Ivybridge, Totnes and Paignton. • When considering opportunities for a 'Strategic Bus and Coach Network' for the Peninsula Region, look to incorporate the Stagecoach 80 service, given its frequency and connectivity from Torbay to Plymouth. • Consider improvements to facilities at Marley Mansion for passengers connecting to/from the South West Falcon.
Brixham	Brixham, Devon , is approx. 6 miles from Paignton. Regular coach and local rail services operate from Paignton, with some long-distance services operating to/from London Paddington.	Stagecoach Service 12 connects Paignton and Torquay with Brixham, operating Every 12mins during the day Monday to Saturday (Every 20mins on Sundays), with a half-hourly daily evening service.	Paignton to Brixham – 20mins	• Look to add the Stagecoach 12 service as a 'Third-Party Connection' to the coach and rail network. • When considering opportunities for a 'Strategic Bus and Coach Network' for the Peninsula Region, look to incorporate the

				Stagecoach 12 service, given its frequency and connectivity in Torbay.
Burnham-on-Sea	Burnham-on-Sea, Somerset, is approx. 11 miles north of Bridgwater. Regular coach services operate to Bridgwater, and regular rail services operate from the nearby station at Highbridge & Burnham to Bristol, Weston-Super-Mare and Exeter.	First Bus Service 21 / 21A connects Taunton, Bridgwater and Burnham-on-Sea with a combined half-hourly service during the day Monday to Saturday (hourly evenings), with an hourly daytime Sunday service.	Bridgwater to Burnham-on-Sea – 40mins	• Look to add the First Bus 21 / 21A service as a 'Third-Party Connection' to the coach and rail network from Bridgwater. • When considering opportunities for a 'Strategic Bus and Coach Network' for the Peninsula Region, look to incorporate these services, given their frequency and the route following that of the existing coach network.
Frome	Frome, Somerset, is located approx. 15 miles south of Bath, and 20 miles south of Chippenham and is in the north east of the Peninsula Region. Frome Railway Station is served by a range of local and main line services to a range of destinations.	First Bus Services D2 and D2x connect Frome to Bath Bus Station approx. hourly during the day with several evening departures Monday to Saturday. A two-hourly D2 service operates during Sunday daytimes. Faresaver Service X34 connects Frome with Chippenham half-hourly during Monday to Saturday daytimes.	Frome to Bath – 55mins (D2x) to 1hr 10mins (D2) Frome to Chippenham (X34) – 1hr 20mins	• Look to add the First Bus Service D2 / D2x and Faresaver Service X34 as 'Third-Party Connections' to the coach network at Bath and Chippenham, respectively.

Yeovil	Yeovil, Somerset, is located approx. 30 miles east of Taunton. Whilst the town is served by the twice-daily Berry's Superfast service, this is oriented towards trips (particularly day trips) from Somerset into London. As such, the town may benefit from improved connections south-westwards from Taunton.	First Bus Service 54 connects Taunton with Somerton, Langport, and Yeovil. Services operate two-hourly during the day Monday to Saturday.	Yeovil to Taunton – 1hr 45mins	• Look to add the First Bus Service 54 as a 'Third-Party Connection' to the coach network at Taunton.

Appendix D – Detail of Optioneering

The criteria used as part of the optioneering process, as well as the approach to scoring routes are shown in **Table 8-4**.

Table 8-4 – Criteria for Third-Party Connection Optioneering

Consideration	Criteria	Scoring Approach
1. Interchange Location and Quality Total 4 points	Quality of Interchange	2 = Same Stop / Station, with Facilities (e.g. Toilets) 1 = Same Stop / Station, with No Facilities *or* Short Walk between Stops, with Facilities (at either / both ends) = Short Walk between Stops, with No Facilities at either end
	Level of Work Needed	2 = Major Works Needed (e.g. Significant infrastructure 1 = Minor Works Needed (e.g. Wayfinding improvements) 0 = No / Almost No Work Needed
2. Third-Party Connection Service Provision Total 5 points	Daytime Service Frequency	1 = Service interval of 60 minutes or less 0.5 = Service interval of between 60 and 120 minutes 0 = Service interval of more than 120 minutes If no Sunday evening service is provided, the Sunday score loses 0.25 points.
	Evening Service Frequency	1 = Service interval of 60 minutes or less 0.5 = Service interval of between 60 and 120 minutes 0 = Service interval of more than 120 minutes If no Sunday evening service is provided, the Sunday score loses 0.25 points.
	Sunday Service Frequency	1 = Service interval of 60 minutes or less 0.5 = Service interval of between 60 and 120 minutes 0 = Service interval of more than 120 minutes

		If no Sunday evening service is provided, the Sunday score loses 0.25 points.
	Level of Work Needed for Timetable / Route	2 = No / Almost No Work Needed / No Suggestions 1 = Suggestion for Minor Changes (e.g. Slightly retimed journey / 1 additional journey to directly connect to coach network) 0 = Suggestion for More Significant Changes (e.g. Additional Evening / Sunday services)
3. Population Reach Total 2 points	Estimated Population Reach *(considering main towns / villages only)*	2 = Estimated Population Reach > 15,000 people 1 = Estimated Population Reach > 2,000 people 0 = Estimated Population Reach < 2,000 people

Each connection was scored individually. The services considered are shown in **Table 8-5**, with the full scoring table being displayed in **Table 8-6**.

Table 8-5 – Services considered as part of the Optioneering process

Service	Operator	Connection at	Third-Party Service Destination(s)
21B	Stagecoach South West	Barnstaple (Devon)	Braunton; Ilfracombe
21 / 21A	Stagecoach South West	Ilfracombe (Devon)	Bideford; Westward Ho! (21); Appledore (21A)
12	Stagecoach South West	Paignton (Torbay)	Brixham
T1 / T2 (Tinner)	First Kernow	Truro (Cornwall)	Redruth, Camborne
GOLD	Stagecoach South West	Plymouth / Marley Head / Totnes (Devon)	Ivybridge
21 / 21A	First Buses of Somerset	Bridgwater (Somerset)	Burnham-on-Sea
17A	First Kernow	Penzance / St Erth (Cornwall)	St Ives
D2 / D2x	First Bath, Bristol and The West	Bath	Frome (Somerset)
9 / 9A	Stagecoach South West	Exeter / Honiton Road Park & Ride (Devon)	Sidmouth, Seaton
X34	Faresaver	Chippenham (Wiltshire)	Frome (Somerset), *Potential to consider Trowbridge and Melksham (Wiltshire, and therefore outside Peninsula Region)*
11	Go Cornwall Bus	Bodmin (Cornwall)	Padstow (Cornwall), Wadebridge (Cornwall)
54	First Buses of Somerset	Taunton (Somerset)	Somerton (Somerset), Yeovil (Somerset)

Table 8-6 – Detail of Route Optioneering and Scoring

				Service Information						Scores						Outcomes	
Area	Route	Operator	Primary Aim for Third Party Connection	Route Origin	Route Destination	Via Points	Interchange Location (Third Party)	Interchange Location (Coach/Rail)	Interchange		Service Provision		Population Reach		Total Score	Rank
									Quality of Interchange	Level of Work (Interchange)	Frequency Score	Level of Work (Route / Timetable)	Estimated Population Reach	Score		
Devon	21B	Stagecoach South West	Connect Ilfracombe to Coach Network	Barnstaple Rail Station	Ilfracombe St James Place	Chivenor Camp; Braunton; Trimstone	Barnstaple Bus Station	Barnstaple Bus Station	2	2	3	2	21,000	2	11	1
Devon	21B	Stagecoach South West	Improve connection for Ilfracombe to Rail Network	Barnstaple Rail Station	Ilfracombe St James Place	Chivenor Camp; Braunton; Trimstone	Barnstaple Rail Station	Barnstaple Bus Station	2	2	3	2	21,000	2	11	1
Devon	21	Stagecoach South West	Connect Bideford to Rail Network	Barnstaple Bus Station	Westward Ho! Swanswood Gardens	Bideford Quay	Barnstaple Rail Station	Barnstaple Bus Station	2	2	2.5	2	20,000	2	11	3
Devon	21A	Stagecoach South West	Connect Bideford to Rail Network	Barnstaple Bus Station	Appledore Seagate Hotel	Bideford Quay	Barnstaple Rail Station	Barnstaple Bus Station	2	2	2.5	2	21,000	2	11	3
Torbay	12	Stagecoach South West	Connect Brixham to Coach Network	Newton Abbot Sherborne Road	Brixham Town Square	Shiphay; Torquay Cary Parade; Paignton Bus Station	Paignton Bus Station	Paignton Great Western Road	1	2	3	2	17,000	2	10	5
Cornwall	T1	First Kernow	Improve connection for Camborne and Redruth to Coach Network	Penzance Bus Station	Truro Bus Station	St Erth Interchange; Hayle; Camborne; Redruth	Truro Bus Station	Truro Bus Station	2	2	1.75	2	47,000	2	10	6
Cornwall	T2	First Kernow	Improve connection for Camborne and Redruth to Coach Network	St Ives Bus Station	Truro Bus Station	Hayle; Camborne; Redruth	Truro Bus Station	Truro Bus Station	2	2	1.75	2	58,000	2	10	6
Devon	GOLD	Stagecoach South West	Improve connection for Ivybridge to Coach Network	Plymouth Royal Parade	Paignton Bus Station	Ivybridge Town Hall; Marley Mansion; Totnes Royal Seven Stars	Totnes Royal Seven Stars / Coronation Road	Totnes Royal Seven Stars / Coronation Road	2	2	2.75	2	12,000	1	10	6
Somerset	21	First Buses of Somerset	Connect Burnham-on-Sea to Coach Network	Taunton Castle Way	Burnham-on-Sea Sea View Road	North Petherton Verriers; Bridgwater Bus Station; Highbridge Cemetery	Bridgwater Bus Station	Bridgwater Bus Station	2	2	1.75	2	26,000	2	10	6
Devon	21	Stagecoach South West	Improve connection for Bideford to Coach Network	Barnstaple Bus Station	Westward Ho! Swanswood Gardens	Bideford Quay	Barnstaple Bus Station	Barnstaple Bus Station	2	2	2.5	1	20,000	2	10	10
Devon	21A	Stagecoach South West	Improve connection for Bideford to Coach Network	Barnstaple Bus Station	Appledore Seagate Hotel	Bideford Quay	Barnstaple Bus Station	Barnstaple Bus Station	2	2	2.5	1	21,000	2	10	10
Cornwall	17A	First Kernow	Connect St Ives to Coach Network	St Ives Bus Station	Lower Boscaswell	St Erth Interchange; Crowlas; Penzance Bus Station	St Erth Interchange	St Erth Interchange	2	2	2.5	2	11,000	1	10	10
Somerset	D2	First Bristol, Bath, and the West	Improve connection for Frome to Coach Network	Bath Bus Station	Frome Sainsbury's	Frome Market Place	Bath Bus Station	Bath Bus Station	2	2	1.25	2	29,000	2	9	13
Devon	9A	Stagecoach South West	Connect Sidmouth to Coach Network	Exeter Bus Station	Seaton Sea Front	Sidmouth Triangle	Exeter Bus Station	Exeter Bampfylde Street	1	2	2	2	21,000	2	9	14
Devon	9A	Stagecoach South West	Connect Sidmouth to Coach Network	Exeter Bus Station	Seaton Sea Front	Sidmouth Triangle	Honiton Road Park & Ride	Honiton Road Park & Ride	1	2	2	2	21,000	2	9	14
Somerset	21A	First Buses of Somerset	Connect Burnham-on-Sea to Coach Network	Taunton Castle Way	Burnham-on-Sea Sea View Road	North Petherton Verriers; Bridgwater Bus Station; Highbridge Cemetery	Bridgwater Bus Station	Bridgwater Bus Station	2	2	1	2	26,000	2	9	14

County	Route	Operator	Action													
Devon	1	Stagecoach South West	Connect Tavistock to Coach Network	Plymouth North Road	Tavistock Bus Station	Plymouth Royal Parade	Plymouth Royal Parade	Plymouth Coach Station	1	2	2.75	2	13,000	1	9	17
Devon	GOLD	Stagecoach South West	Improve connection for Ivybridge to Coach Network	Plymouth Royal Parade	Paignton Bus Station	Ivybridge Town Hall; Marley Mansion; Totnes Royal Seven Stars	Plymouth Royal Parade	Plymouth Coach Station	1	2	2.75	2	12,000	1	9	17
Devon	GOLD	Stagecoach South West	Improve connection for Ivybridge to Coach Network	Plymouth Royal Parade	Paignton Bus Station	Ivybridge Town Hall; Marley Mansion; Totnes Royal Seven Stars	Marley Mansion	Marley Mansion	1	2	2.75	2	12,000	1	9	17
Somerset	D2X	First Bristol, Bath, and the West	Improve connection for Frome to Coach Network	Bath Bus Station	Frome Sainsbury's	Frome Market Place	Bath Bus Station	Bath Bus Station	2	2	0.5	2	29,000	2	9	20
Devon	9	Stagecoach South West	Connect Sidmouth to Coach Network	Exeter Bus Station	Honiton Lace Walk	Sidmouth Triangle	Exeter Bus Station	Exeter Bampfylde Street	1	2	1.5	2	13,000	1	8	21
Devon	9	Stagecoach South West	Connect Sidmouth to Coach Network	Exeter Bus Station	Honiton Lace Walk	Sidmouth Triangle	Honiton Road Park & Ride	Honiton Road Park & Ride	1	2	1.5	2	13,000	1	8	21
Somerset	X34	Faresaver	Improve connection for Frome to Coach Network	Chippenham Bus Station	Frome Market Place	Chippenham Sainsbury's; Melksham Market Place; Trowbridge	Chippenham Sainsbury's	Chippenham Sainsbury's	1	2	1	0	29,000	2	6	24
Cornwall	11	Go Cornwall Bus	Connect Padstow and Wadebridge to Coach Network	Plymouth Royal Parade	Padstow Bus Terminus	Wadebridge Bus Station; Bodmin; Liskeard	Bodmin Mount Folly	Bodmin Dennison Road Car Park	0	1	2.25	2	8,000	1	6	23
Somerset	54	First Buses of Somerset	Improve connection for Yeovil to Coach Network	Taunton The Parade	Yeovil Bus Station	Somerton White Hart	Taunton Market House	Taunton County Hall	0	1	0.5	1	55,000	2	5	25