

Synovate report: introduction

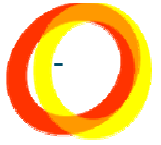
Between 17 November and 18 December, the CC commissioned Synovate Ltd (Synovate) to conduct interviews for quantitative research among customers of FirstGroup buses, Wessex Trains, Stagecoach buses and National Express Group coaches. The report which follows describes the results relevant to this inquiry, namely surveys of passengers using FirstGroup buses and Wessex Trains between Bristol and Bath, and Bristol and Weston-super-Mare.

As part of its commitment to transparent conduct of the inquiry, the CC is making available the Synovate report, setting out the results of this research. This follows below.

Report

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Research reinvented

Greater Western Passenger Rail Franchise Inquiry Survey of Public Transport Users in South West England

Prepared for	The Competition Commission
Prepared by	Synovate
Job number	952991
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Table of Contents

	Page
1. Background	1
2. Research Methodology	2
3. Executive Summary	4
4. Respondent Profile	7
5. Detailed Results	10
5.1 Current Journey Information	10
5.2 Ticket Information	18
5.3 Current Transport Factors	20
5.4 Alternatives Modes of Transport	23
5.5 Actions if Situation Changed	30
5.6 Perception of Fare Changes	32
Appendices	
Appendix 1 - Questionnaire	34
Appendix 2 - Qualifying Stops	45

1. Background

The Competition Commission (CC) is an independent public body charged with the responsibility to conduct in-depth inquiries into mergers, markets and the regulation of the major regulated industries, undertaken in response to a referral made to it by another authority.

The Office of Fair Trading (OFT) referred the acquisition of the Greater Western Passenger Rail Franchise by FirstGroup plc, National Express Group plc, Stagecoach Holdings plc and Wessex Trains (operated by National Express Group plc) to the Competition Commission.

The Competition Commission was asked to consider the effects of the acquisition on certain routes in the area covered by the Greater Western rail franchise. Synovate was asked to survey public transport users in the franchise area.

The main objective was to establish if the acquisition may be expected to result in a substantial lessening of competition in the market for the supply of passenger transport services in the franchise area. Specific research objectives were to:

- Understand attitudes and the propensity to use alternative transport links available in the franchise area
- Identify reasons for choice of transport services
- Identify factors for current/recent journey
- Establish whether passengers consider possible services as realistic alternatives

This report covers the surveys conducted on FirstGroup and Wessex Trains, but does not make any reference to the data collected in the surveys conducted on National Express Group and Stagecoach.

2. Research Methodology

The research was conducted using self-completion questionnaires, administered by interviewers, with public transport passengers of FirstGroup buses, Wessex Trains, Stagecoach buses and National Express Group coaches. A copy of the questionnaire can be seen in Appendix 1.

The transport routes covered by the research are as follows:

- FirstGroup and Wessex Trains:
 - Bristol - Bath
 - Bristol - Weston
- National Express Group:
 - ✂
- Stagecoach
 - ✂

Interviewers joined the vehicle (bus, coach or train) at the origin of the route and after a short period, administered surveys based on the passengers meeting the following key criteria:

- Boarded and left the vehicle at qualifying stops (a list of which can be found in Appendix 2).
- Only be travelling on **one** of the vehicle types on board which they were surveyed i.e. if onboard a train they were excluded from the research if they had already been on a different train or if they were transiting onto another train as part of their current journey.
- To have personally decided the ticket type that they purchased for their current journey.
- To have purchased their ticket for their current journey separately i.e. not as part of a package.

Once interviewers had established that passengers qualified for the survey questionnaires were distributed. These were then collected once respondents had completed them. In addition, reply paid envelopes were provided where passengers did not have sufficient time to complete the survey during their journey.

The fieldwork was conducted between 17th November and 18th December, across week days and weekends. Approximately 20% of the Wessex Train fieldwork shifts were conducted at weekends and 38% of FirstGroup fieldwork shifts were conducted at weekends. Fieldwork shifts were conducted between 7am and 7.45pm.

A total of 482 surveys were completed with FirstGroup passengers and 529 with Wessex Trains passengers.

All data within this report relate to this sample of respondents only and no reference is made to any other sources. All data was collected using self-completion questionnaires and therefore all information is stated by the respondent.

No weighting has been applied to the data.

3. Executive Summary

Passenger Profile and Behaviour

The respondent profile of passengers of each of the modes of transport is as follows:

- FirstGroup passengers tend to be older and more skewed towards females, with a higher proportion of retired respondents amongst the passengers.
- Wessex Trains passengers are more likely than other passengers to be employed and use the train for daily commuting to/from work.

Current Journey Profile

The journey profile does differ somewhat between passengers of FirstGroup and Wessex:

- Over a third of Wessex passengers are heading to work (36%) compared to just 17% of FirstGroup passengers.
- 'Bus' is used by almost half (49%) of the FirstGroup passengers to reach their destination with 'walking' used second most (43%).
- Over half the Wessex Trains passengers reach their final destination on 'foot' (53%).
- The expected journey time amongst Wessex passengers is much shorter, with 73% expecting it to be less than 30 minutes compared to 22% of FirstGroup passengers expecting the same journey time.
- The frequency of travel is fairly similar, with 31% of FirstGroup passengers travelling on the bus route 3 or more times a week compared to 41% of Wessex Trains passengers.

Factors of Importance

In line with the passenger profile identified previously, the factors of most importance differ according to the transport type used:

- The factors of most importance to passengers of FirstGroup are 'stops at convenient station/stop', 'frequency of service' and 'cost of ticket', which are identified as the top three factors of importance.
- Wessex Trains passengers identify the 'short journey time', 'departure time' and 'stops at convenient station/stop' as most important.
- 'Space for luggage' is of least importance to passengers on both FirstGroup buses and Wessex Trains.

Ticket Types and Prices

Passengers on board both FirstGroup and Wessex are likely to have purchased similar ticket types:

- Amongst FirstGroup passengers 'adult return' is most frequently cited as the ticket type purchased (34%), followed by 'period/season ticket' (23%) and 'adult single' (17%).

- Wessex Trains passengers most frequently cite 'standard day return' as their ticket type (39%), followed by 'cheap day return' (20%) and 'period/season ticket' (18%).
- The majority of both FirstGroup and Wessex passengers indicate that their bus or train ticket accounts for either the total cost of their journey or over half the cost.

Alternative Modes of Transport

With regard to alternative modes of transport available to them in terms of awareness, perception of most expensive mode and ease of permanently changing, there are some similarities across the passengers of both FirstGroup and Wessex Trains.

- Passengers of FirstGroup are predominantly aware of the alternative train service that is available and most perceive the train to be most expensive.
- Passengers of Wessex Trains are mostly aware of the alternative bus service available and these passengers also perceive the train to be the most expensive form of transport.
- In terms of how easy it would be to permanently change their mode of transport, no more than half the FirstGroup or Wessex passengers identify any alternatives as easy (quite or very) to change to.
- FirstGroup passengers would find it easiest to change to 'train' (48% saying it would be quite or very easy) and Wessex Trains passengers would find it easiest to change to using a 'car as a driver' (48% saying quite or very easy).
- Conversely the majority of passengers would find it somewhat difficult to change to most alternative modes of transport.
- FirstGroup passengers are most likely to have used a 'car as a passenger' (37%) over the last 12 months followed by 'train' (32%).
- Wessex Trains passengers are most likely to have used a 'car as a driver' (33%) or a 'car as a passengers' (29%).

Comparison of Current Mode of Transport with Alternatives

- FirstGroup passengers are most positive about the fact that the buses 'stop at convenient station/stop'; with 53% saying it is better or much better than their alternative mode of transport. This is also the most important factor for these passengers.
- Wessex passengers are most positive about the 'short journey time'; with 69% saying it is better or much better than their most frequently used alternative mode of transport. Once again this is the most important factor identified by these passengers.

Likely Actions if Services Changed

- When presented with the scenario of the current service no longer operating, the 'train' (46%) is cited most frequently by FirstGroup passengers as the mode they would switch to, while Wessex Trains passengers would switch most frequently to 'bus' (36%), with a fair proportion saying 'car' (25% as a driver and 5% as a passenger).
- In the event of a 5% price increase on the current service, 44% of FirstGroup passengers indicate that they would switch to a specified alternative transport mode and 30% of Wessex passengers indicate that they would switch mode of transport.
- In the event of a 5% fare increase on the current service, around two-fifths of FirstGroup passengers (37%) and a similar proportion of Wessex passengers (39%) do not know what action they would take. In terms of the proportion that would not change, 26% of Wessex would not and 13% of FirstGroup would not change.
- The transport that passengers cite most frequently as those that they would change to are 'train' (20%) amongst FirstGroup passengers and amongst Wessex passengers it is 'car as driver' (13%) or 'bus' (12%).

Perception of Changes to Fares

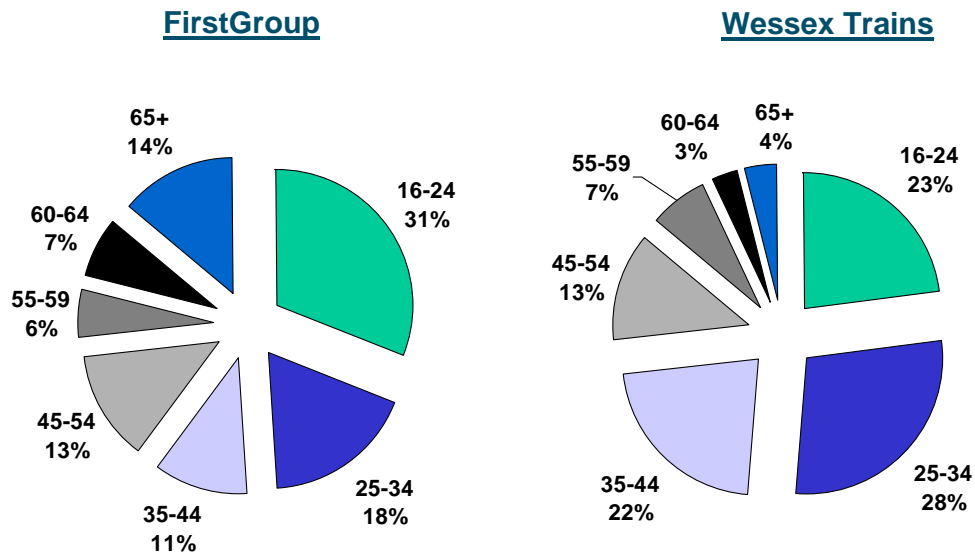
- Over half the FirstGroup passengers surveyed believe that fares on FirstGroup buses have increased (56%) over the last 12 months, whereas only a third believe they have increased on other modes of transport on the same route.
- Around two-fifths of Wessex Trains passengers (39%) believe that fares on Wessex have increased over the last 12 months and a similar proportion believe that they have increased on other modes of transport (37%).

4. Respondent Profile

The following table provides a breakdown of the respondents profile according to the key demographics for both FirstGroup and Wessex Trains passengers.

		FirstGroup	Wessex Trains
		<i>Base: 482</i>	<i>Base: 529</i>
Age (Q26) Excludes 'not answered'	16-34	48%	50%
	35-54	23%	35%
	55-64	13%	9%
	65+	14%	4%
Gender (Q25) Excludes 'not answered'	Male	33%	49%
	Female	65%	50%
Employment (Q28) Excludes 'not answered'	Employed (FT/PT/self)	58%	78%
	Retired	17%	5%
	Other	24%	16%
Number of Adults in Group (Q27) Excludes 'not answered'	One	72%	75%
	Two	15%	14%
	Three +	6%	4%

Respondent Profile - Age

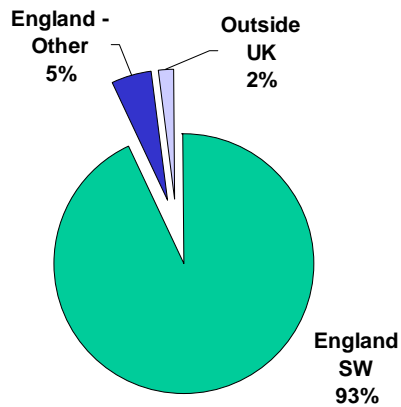


Base: All respondents (Q26): FirstGroup: 471 (excludes not answered). Wessex: 521 (excludes not answered).

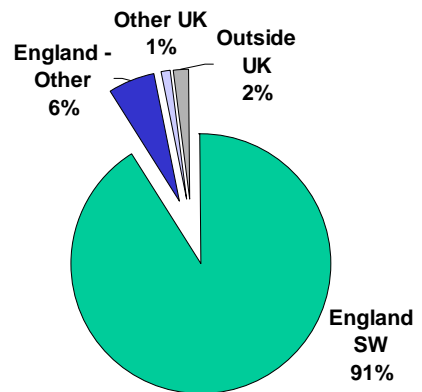
- Just under a third of FirstGroup passengers are aged between 16 and 24 years of age (31%), whilst 27% are aged 55 or over.
- Just under a quarter of the Wessex Trains passengers are aged 16 to 24 years of age (23%), whilst 14% are aged 55 or over. The age group accounting for most passengers is 25 to 34 years olds (28%).

Respondent Profile - Residence

FirstGroup



Wessex Trains



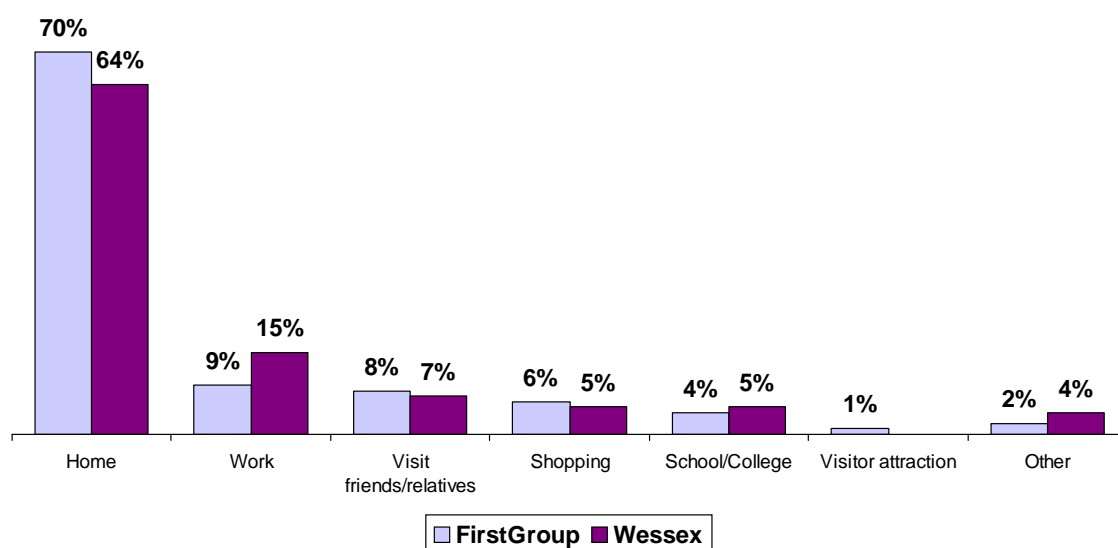
Base: All those that responded (Q29): FirstGroup: 474. Wessex: 517

- The residence profile of FirstGroup passengers and Wessex Trains passengers is very similar, with the majority of each residing in South West England, 93% and 91% respectively.

5. Detailed Results

5.1 Current Journey Information

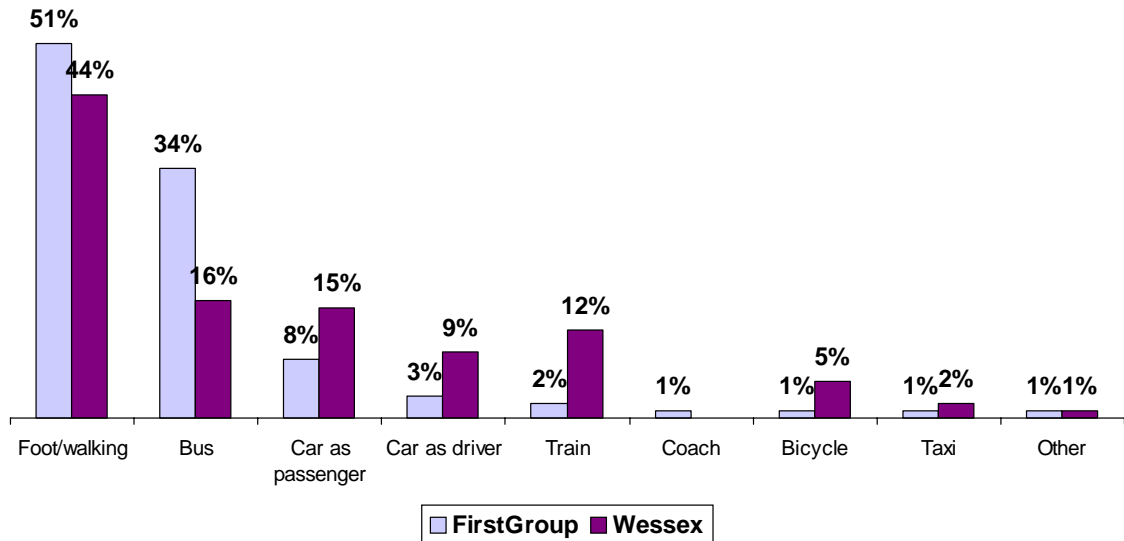
Journey Origin



Base: All respondents (Q1): FirstGroup: 482, Wessex: 529.

- The vast majority of FirstGroup passengers start their journey from 'home' (70%) and this is also true of the Wessex passengers (64%).
- 'Work' is cited by 15% of Wessex passengers as their origin compared to 9% of FirstGroup passengers.
- Other origins mentioned include 'visiting friends/relatives' (8% for FirstGroup and 7% for Wessex) and 'shopping' (6% and 5% respectively).

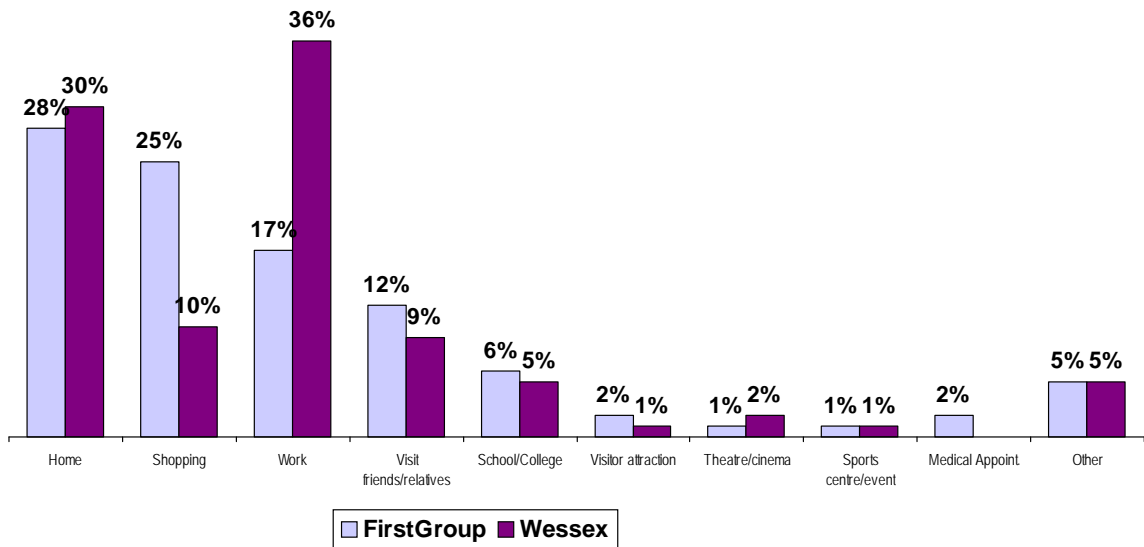
Mode of Transport from Origin



Base: All respondents (Q2): FirstGroup: 482, Wessex: 529.

- Around half the FirstGroup passenger indicate that they reached the vehicle 'on foot/walking' (51%) and slightly fewer Wessex passengers identified the same (44%).
- The 'bus' is cited by 34% of FirstGroup passengers and by just 16% of Wessex passengers.
- Wessex passengers tend to be more likely to have used a 'car as a passenger' (15%) or a 'car as a driver' (9%) to reach the train compared to 8% and 3% of FirstGroup passengers using each of these modes to reach the bus.

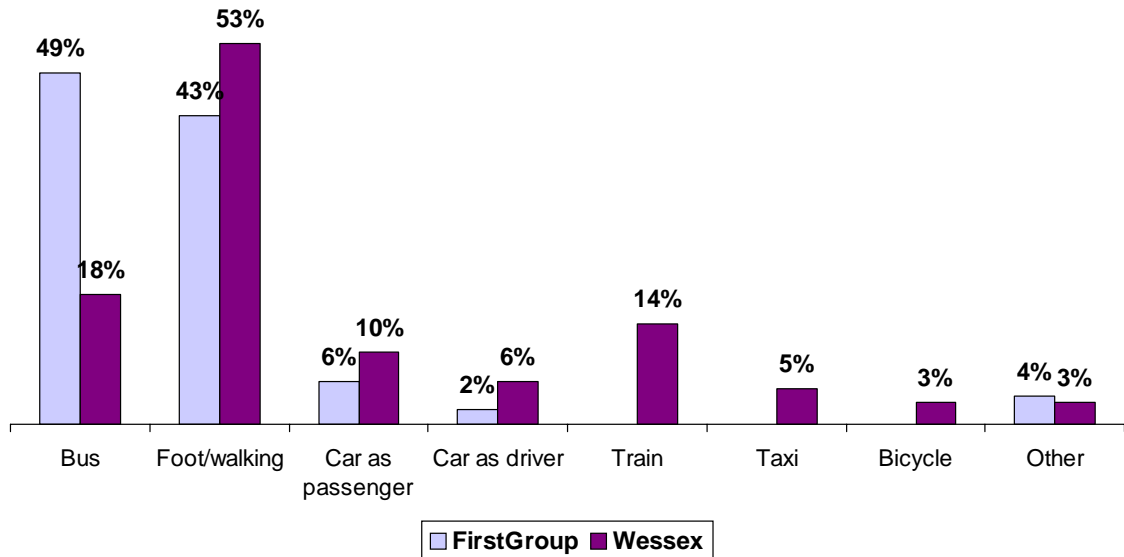
Journey Destination



Base: All respondents (Q3): FirstGroup: 482, Wessex: 529.

- 'Home' is mentioned most frequently amongst FirstGroup passengers when asked what their destination is (28%) followed by 'shopping' (25%), 'work' (17%) and 'visiting friends/relatives' (12%).
- For Wessex Trains passengers, 'work' is cited most frequently as the destination (36%), followed by 'home' (30%), 'shopping' (10%) and 'visiting friends/relatives' (9%).

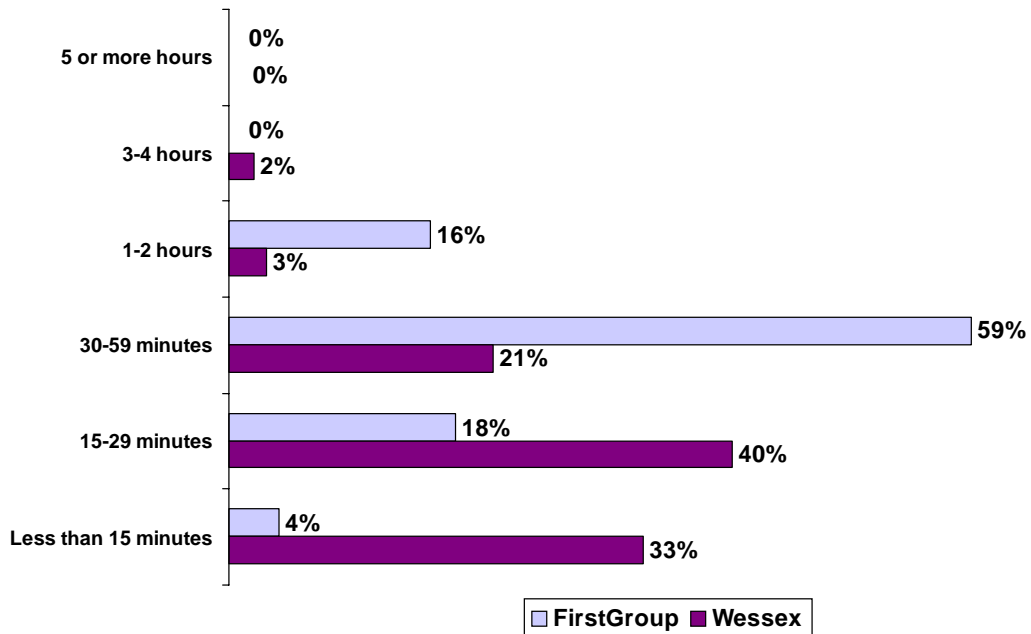
Mode of Transport to Destination



Base: All respondents (Q4): FirstGroup: 482, Wessex: 529.

- The 'bus' is mentioned by 49% of FirstGroup passengers as a mode used to reach their final destination and a further 43% go on 'foot/walking'.
- Just over half the Wessex passengers indicate that they go on 'foot/walking' to reach their destination (53%) and a further 18% cite the 'bus'.

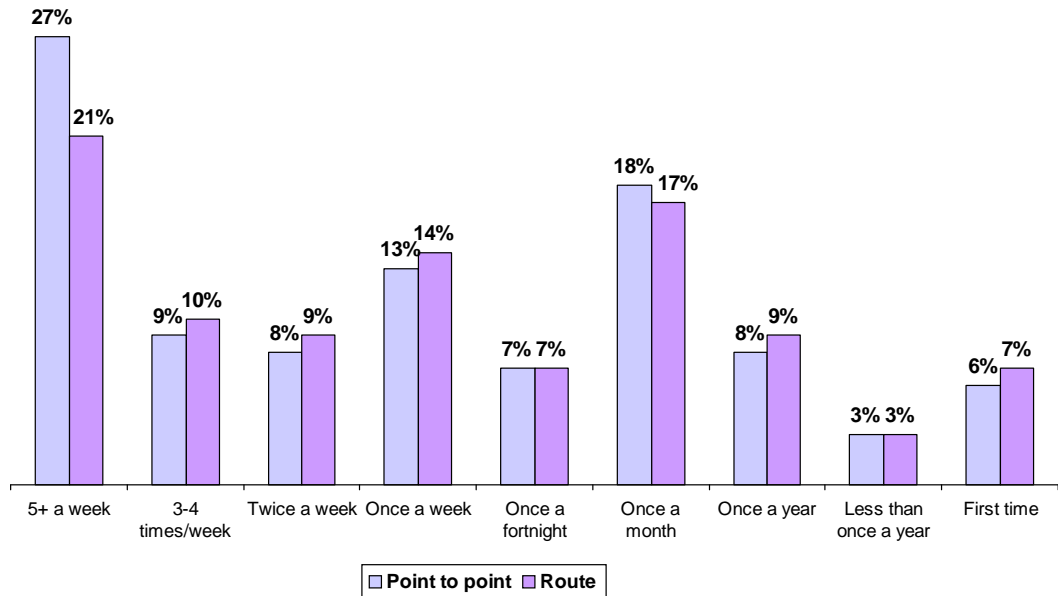
Expected Journey Time



Base: All respondents (Q5): FirstGroup: 482, Wessex: 529.

- The majority of passengers on FirstGroup buses expect their journey to take '30-59' minutes (59%) and a further 16% expect it to take '1-2 hours'.
- A third of passengers on Wessex Trains expect their journey to take 'less than 15 minutes' (33%) and a further 40% expect it to take slightly longer, '15-29 minutes'.
- None of the passengers on either FirstGroup buses or Wessex Trains expect their journey to be more than 4 hours.

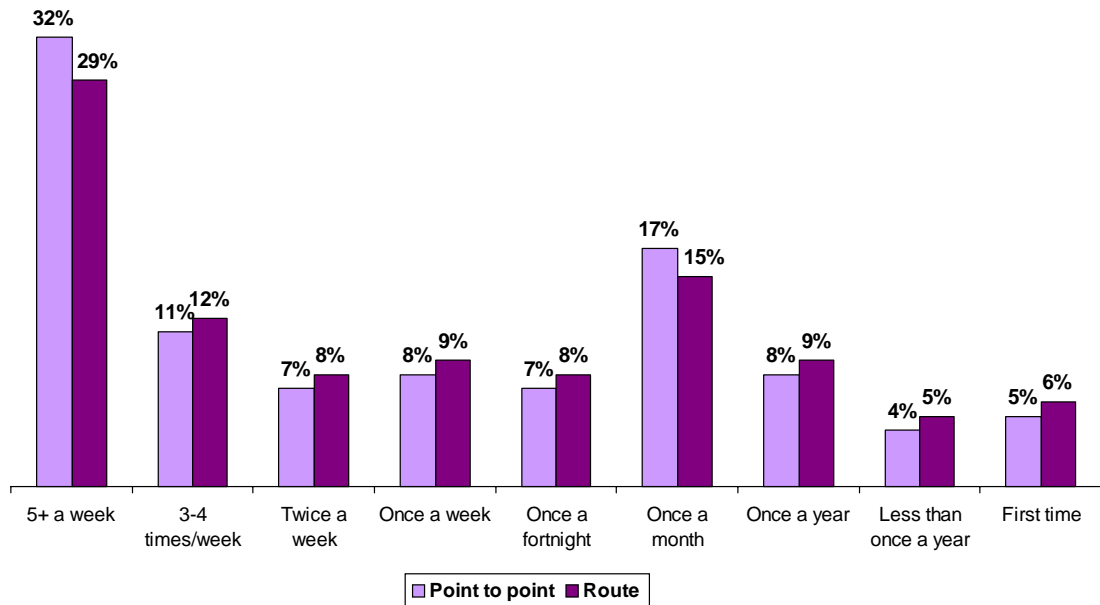
Frequency of Travel - FirstGroup



Base: All respondents (Q6/7/9): FirstGroup: 482, Wessex: 529.

- Over a quarter of FirstGroup passengers travel point-to-point 5 or more times a week (27%) and 30% travel point-to-point 1-4 times a week. Almost a fifth of passengers travel once a month (18%), although just 6% indicate that it is their first time travelling point-to-point.
- Over a fifth of the FirstGroup passengers surveyed travel 5 times or more a week (21%) on this bus route and 33% travel 1-4 times a week. Similar to the point-to-point travel, 17% of passengers travel on this bus route once a month and 7% are travelling for the first time on this bus route.

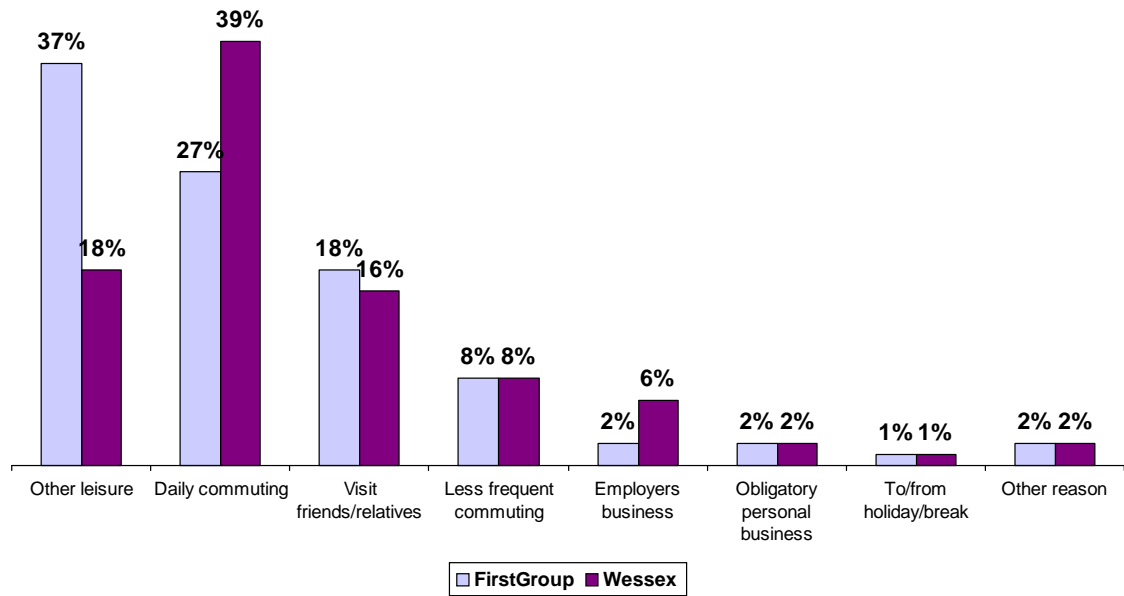
Frequency of Travel – Wessex Trains



Base: All respondents (Q6/7): 529.

- Almost a third of Wessex passengers travel point-to-point 5 or more times a week (32%) and 26% travel point-to-point 1-4 times a week. Almost a fifth of passengers travel once a month (17%), although just 5% indicate that it is their first time travelling point-to-point.
- Over a quarter of the Wessex passengers surveyed travel 5 times or more a week (29%) on this bus route and 29% travel 1-4 times a week. Similar to the point-to-point travel, 15% of passengers travel on this bus route once a month and 6% are travelling for the first time on this bus route.

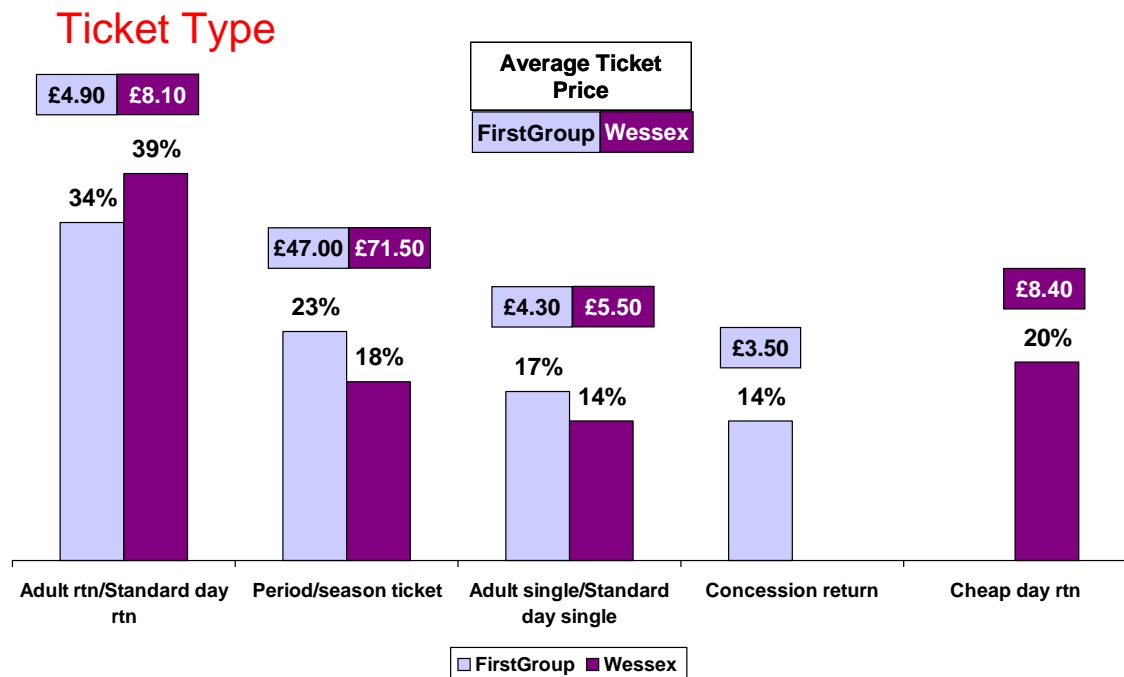
Purpose of Travel



Base: All respondents (Q9): FirstGroup: 482, Wessex: 529.

- Almost two-fifths of FirstGroup passengers are travelling for 'other leisure (shopping, sports event, concert, theatre or day trip)' (37%) and a further 27% are 'daily commuting - to/from work, school or college' with 18% 'visiting friends/relatives'.
- The most frequently mentioned reason for travelling amongst Wessex passengers is 'daily commuting - to/from work, school or college' (39%), followed by 'other leisure (shopping, sports event, concert, theatre or day trip)' (18%) and 'visiting friends/relatives' (16%).

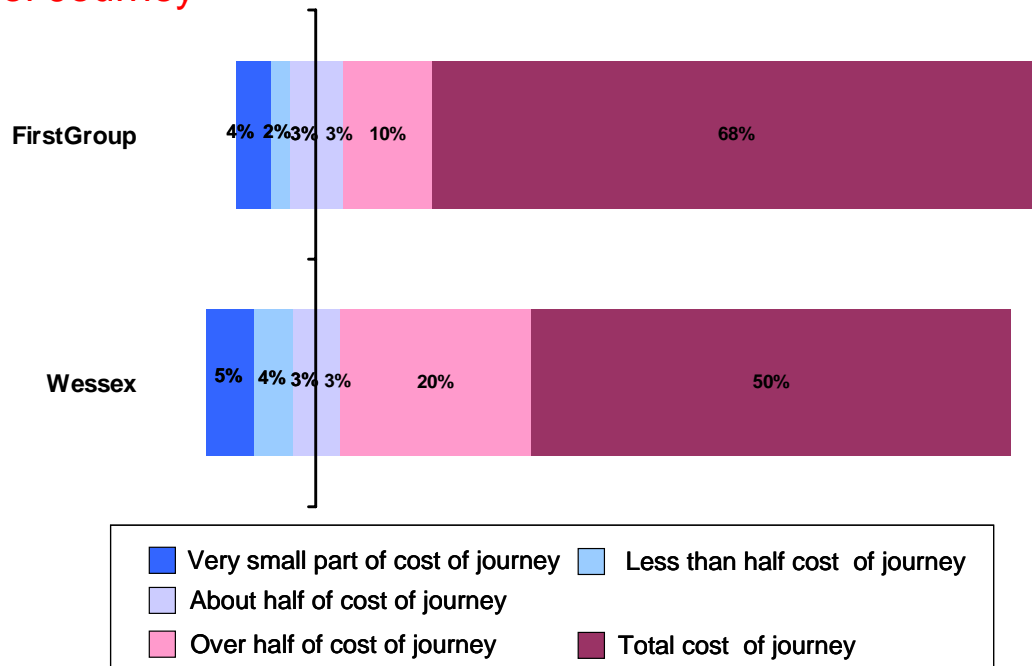
5.2 Ticket Information



Base: All respondents (Q10): FirstGroup: 482, Wessex: 529. FirstGroup: Adult return: 163, Period/season ticket: 109, Adult single: 81, Concession return: 68. Wessex: Standard day return: 205, Cheap day return: 108, Period/season ticket: 97, Standard day single: 75.

- Over a third of FirstGroup passengers are travelling on an 'adult return' ticket (34%) and the average cost cited by passengers for this ticket is £4.90. A further 23% are travelling on a 'period/season ticket' and the average price is £47.00.
- 'Standard day return' is the most frequently mentioned ticket type (39%) amongst Wessex Trains passengers and the average cost is £8.10. A fifth of passengers are travelling on a 'cheap day return' and the average cost is £8.40.

Ticket Price Compared to Total Cost of Journey

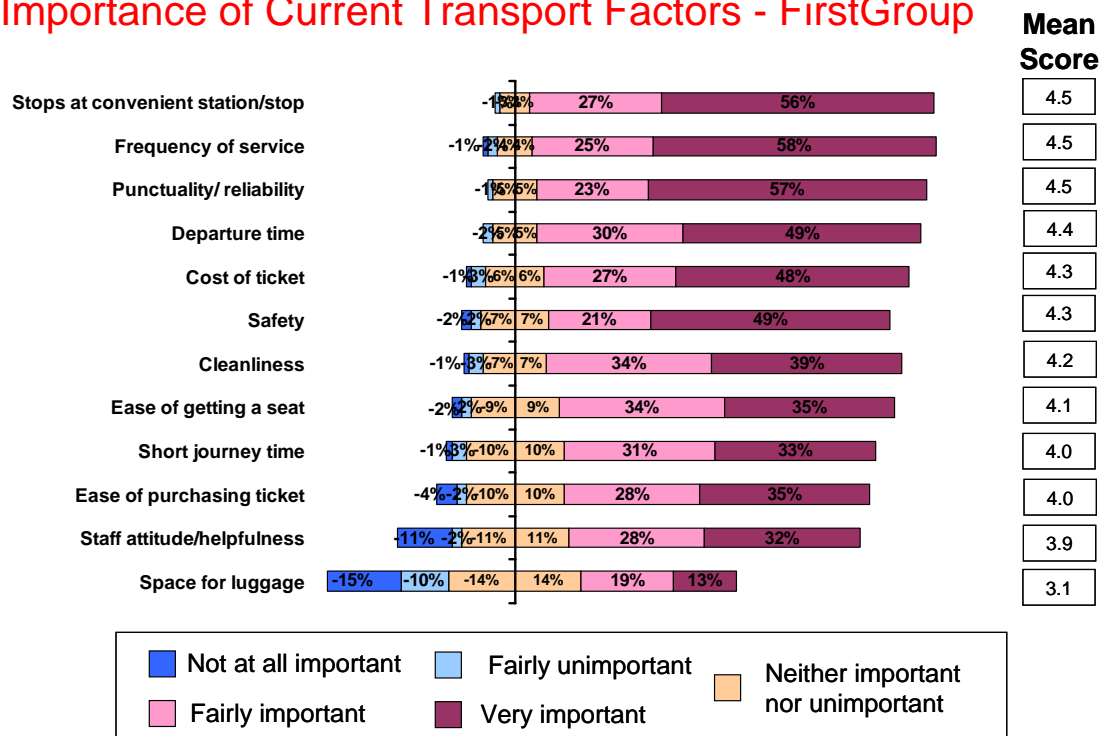


Base: All respondents (Q12): FirstGroup: 482, Wessex: 529.

- Over two thirds of FirstGroup passengers indicate that their bus ticket accounts for the 'total cost of their journey' (68%) and a further 10% say that it accounts for 'over half the cost of their journey'.
- Exactly half of the Wessex Trains passengers indicate that their train ticket accounts for the 'total cost of their journey' (50%), whilst 20% say that it accounts for 'over half the cost of their journey'.

5.3 Current Transport Factors

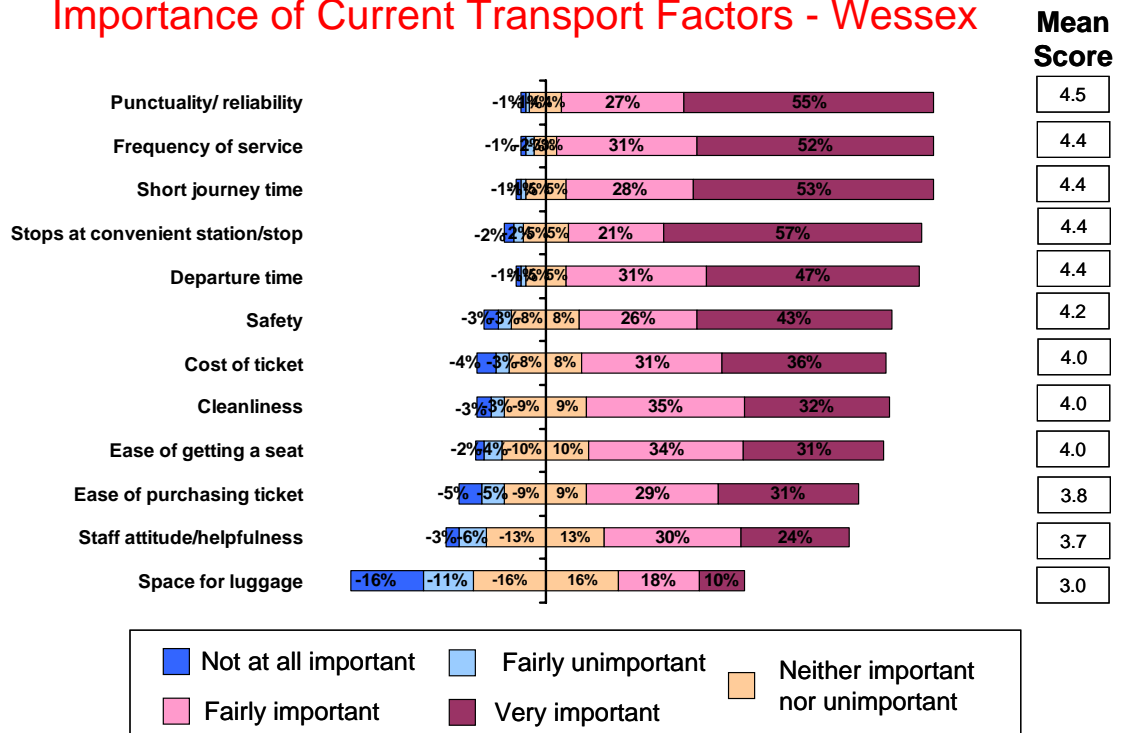
Importance of Current Transport Factors - FirstGroup



Base: All respondents (Q15): 482.

- With the exception of 'space for luggage', the majority of passengers on FirstGroup buses identify each of the factors listed as either fairly important or very important. The factor that is most frequently identified as being of importance is 'stops at convenient station/stop' and 'frequency of service' (83% identify each as either fairly or very important).
- Thirty two percent of FirstGroup passengers identify 'space for luggage' as being either fairly or very important and a quarter say that it is either fairly or very unimportant (25%).

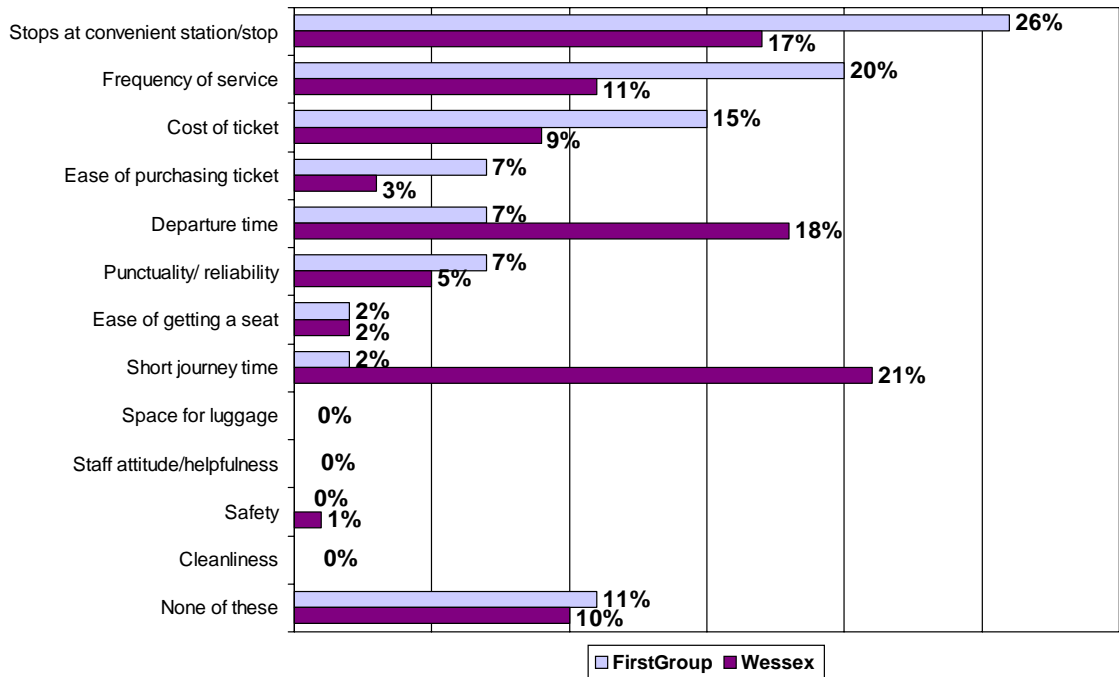
Importance of Current Transport Factors - Wessex



Base: All respondents (Q15): 529.

- With the exception of 'space for luggage', the majority of passengers on Wessex Trains identify each of the factors listed as either fairly important or very important. The factor that is most frequently identified as being of importance is 'punctuality/reliability', 'frequency of service' and 'short journey time', with 82%, 83% and 81% identify each of these respectively as either fairly or very important.
- Twenty eight percent of Wessex passengers identify 'space for luggage' as being either fairly or very important and 27% say that it is either fairly or very unimportant.

Most Important Factor

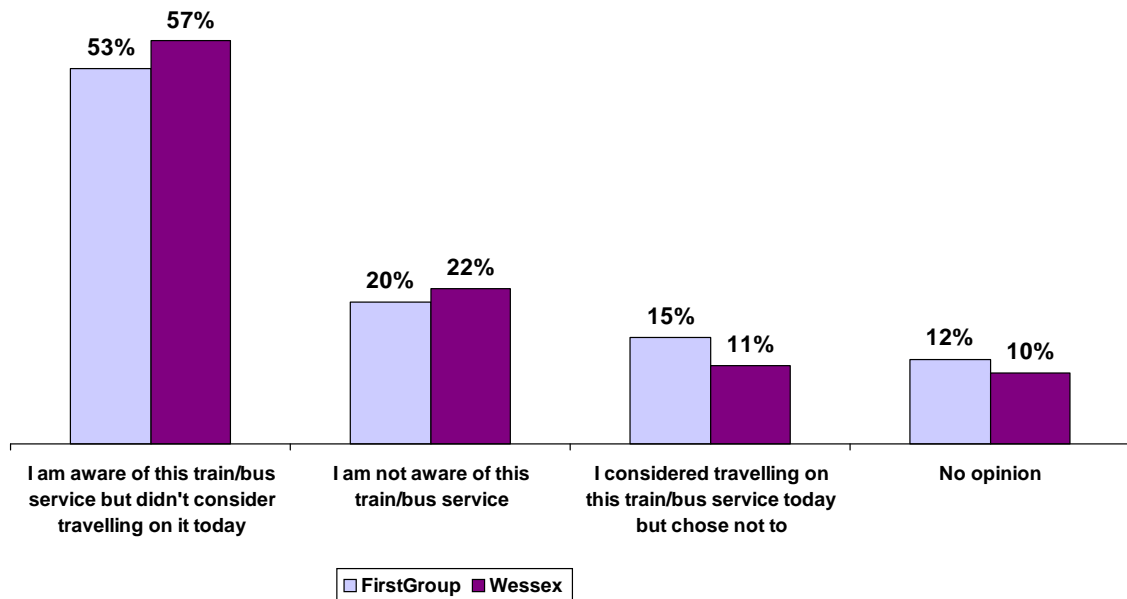


Base: All respondents (Q16): FirstGroup: 482, Wessex: 529.

- When asked to identify the factor of *most* importance, over a quarter of FirstGroup passengers cite 'stops at convenient station/stop' (26%) and a further 20% cite 'frequency of service' followed by 15% identifying 'cost of ticket'.
- For Wessex passengers, the most frequently mentioned factor is 'short journey time' (21%), followed by 'departure time' (18%) and 'stops at convenient station/stop' (17%).

5.4 Alternatives Modes of Transport

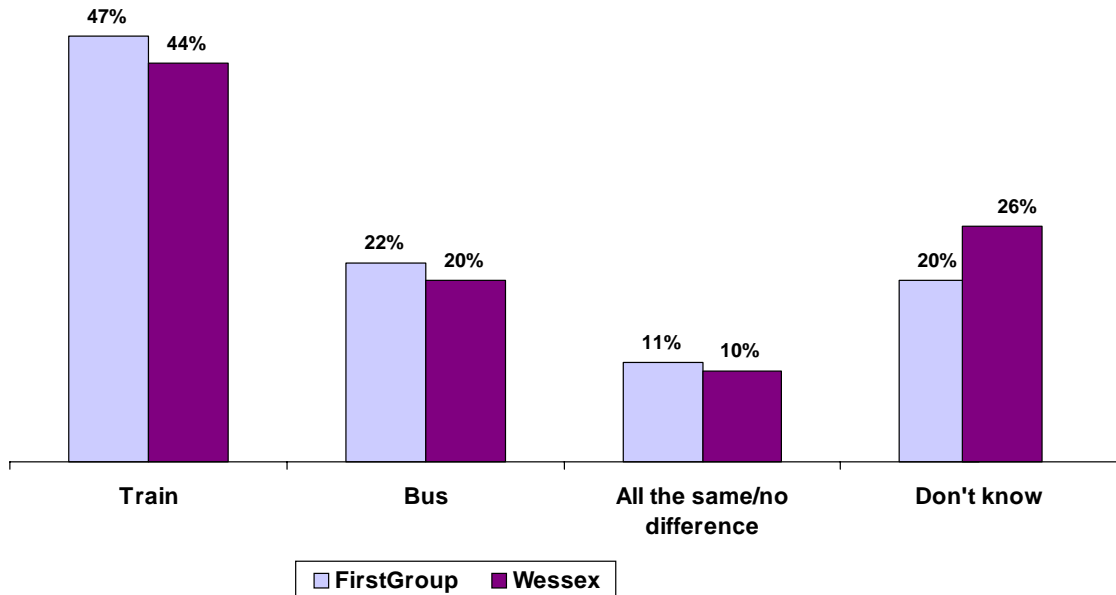
Awareness of Other Services – Train/Bus



Base: All respondents (Q13): FirstGroup: 482, Wessex: 529.

- The majority of the FirstGroup passengers are aware of the alternative train service (68%), with 53% that did not actually consider the train for their current journey and 15% that did consider it.
- The majority of Wessex Trains passengers (68%) are aware of the alternative bus service, with 57% that did not consider it as an alternative and 11% that did consider it.
- A fifth of FirstGroup passengers are not aware of the alternative train service and a similar proportion of Wessex Trains passengers are not aware of the alternative bus service (22%).

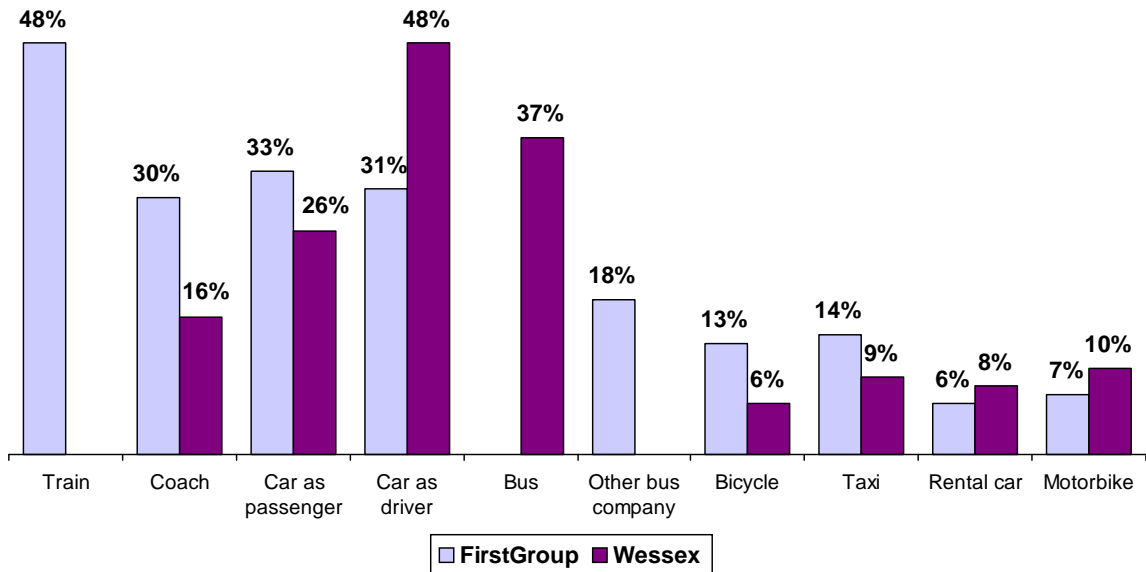
Perception of Which is Most Expensive Service



Base: All respondents (Q14): FirstGroup: 482, (Q13): Not aware: 96, Aware but did not consider: 255, Considered but chose not to: 74, Wessex: 529, (Q13): Not aware: 117, Aware but did not consider: 304, Considered but chose not to: 57

- Almost half of the FirstGroup passengers (47%) and the Wessex Trains passengers (44%) believe that the 'train' service is the most expensive.
- Around a fifth of FirstGroup passengers (22%) identify the 'bus' as most expensive and a similar proportion of Wessex passengers (20%) also identify the 'bus'.
- However a fifth of FirstGroup passengers do not know which is most expensive (20%) and 26% of Wessex passengers do not know which is most expensive.

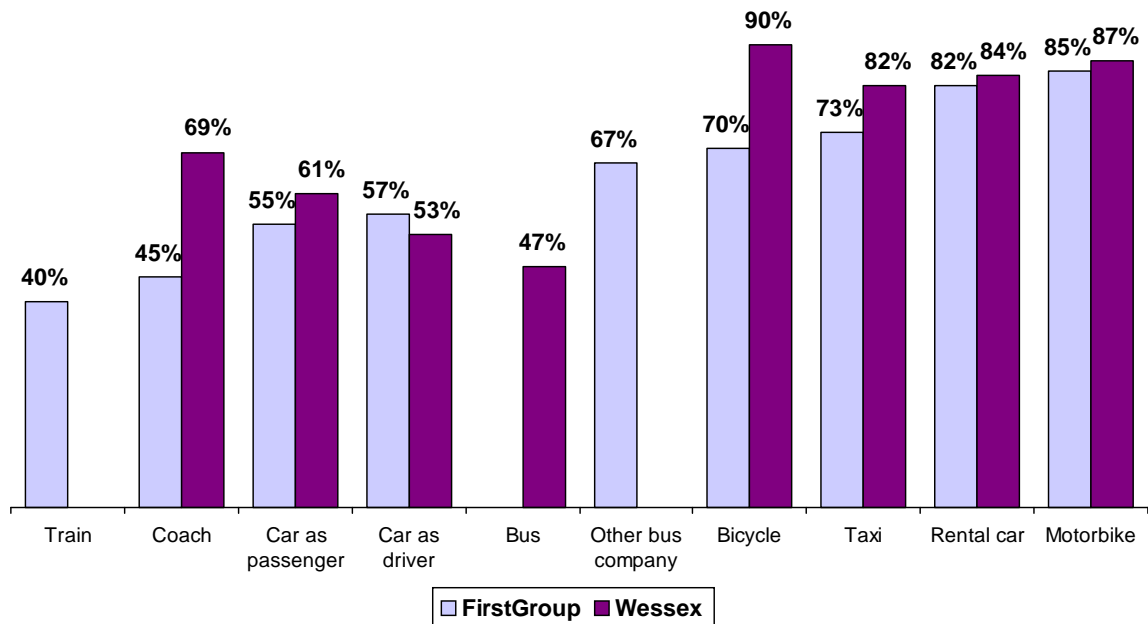
Ease of Permanently Changing: those finding it quite easy/very easy



Base: All respondents expressing an opinion (Q17): FirstGroup: Train: 424, Coach: 146, Car as passenger: 390, Car as driver: 372, Rental car: 324, Other bus company: 327, Taxi: 356, Motorbike: 327, Bicycle: 149, Wessex: Bus: 465, Car as driver: 451, Car as passenger: 447, Coach: 436, Taxi: 428, Rental car: 376, Motorbike: 365, Bicycle: 391.

- In terms of how easy it would be for passengers to permanently change to other modes of transport, 'train' tends to be the easiest to change to for FirstGroup passengers, with 48% indicating that it would be either quite or very easy.
- Around a third of FirstGroup passengers would also find it quite or very easy to change permanently to using a 'car as a passenger' (33%), 'car as a driver' (31%) or 'coach' (30%).
- For Wessex passengers almost half indicate that it would be quite or very easy to permanently change to using a 'car as driver' (48%), with 37% identifying the 'bus' as quite or very easy to change to and 26% identifying 'car as a passenger'.

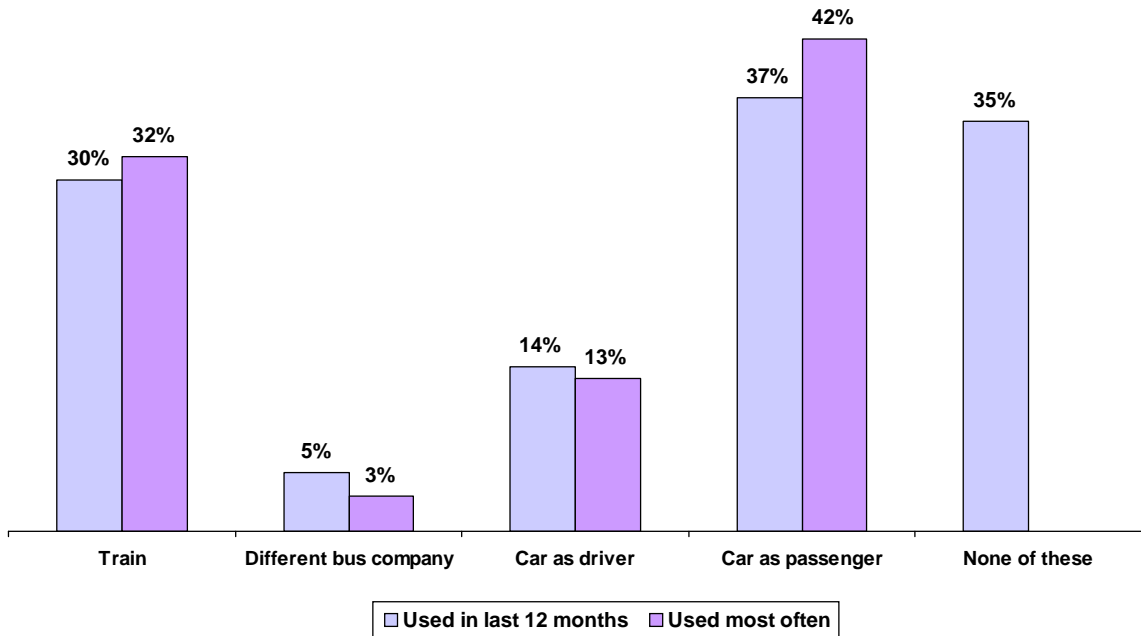
Ease of Permanently Changing: those finding it quite difficult/very difficult



Base: All respondents expressing an opinion (Q17): FirstGroup: Train: 424, Coach: 146, Car as passenger: 390, Car as driver: 372, Rental car: 324, Other bus company: 327, Taxi: 356, Motorbike: 327, Bicycle: 149, Wessex: Bus: 465, Car as driver: 451, Car as passenger: 447, Coach: 436, Taxi: 428, Rental car: 376, Motorbike: 365, Bicycle: 391.

- Looking at the information from the other viewpoint, the modes of transport that both FirstGroup and Wessex passengers would find it hardest to permanently switch to are 'bicycle' (70% of FirstGroup and 90% of Wessex would find it quite or very difficult), 'taxi' (73% and 82% respectively), 'rental car' (82% and 84% respectively) and 'motorbike' (85% and 87% respectively).
- Over half the FirstGroup passengers would find it quite or very difficult to permanently switch to using 'another bus company' (67%), 'car as driver' (57%) or 'car as passenger' (55%).
- Wessex passengers would generally find it hard to permanently switch to using a 'coach' with 69% indicating that it would be quite or very hard, 'car as passenger' (61% quite or very hard) or 'car as driver' (53%).

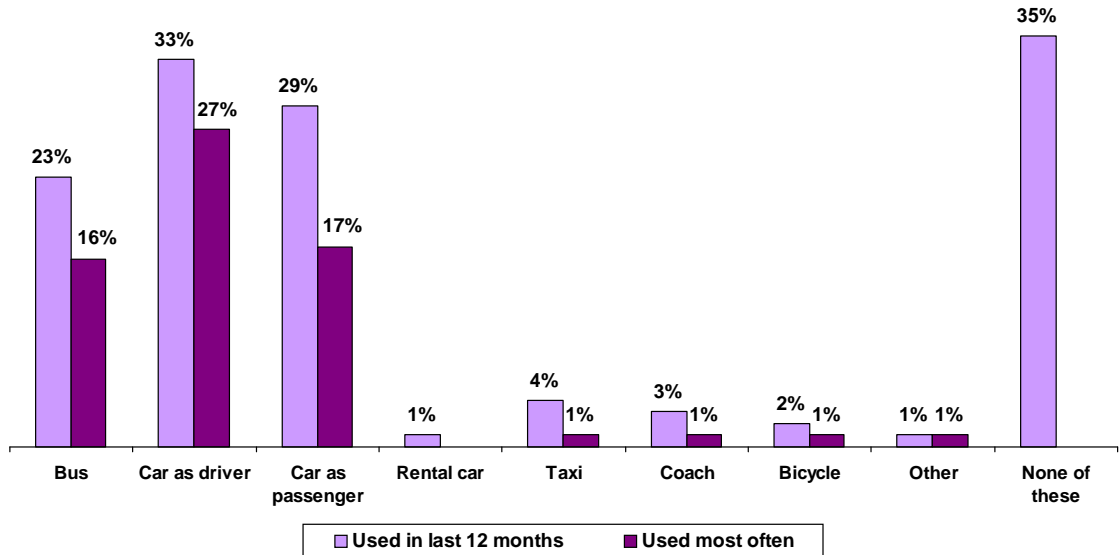
Use of Other Modes of Transport on this Journey - FirstGroup



Base: All respondents (Q19): FirstGroup: 482, (Q20): 313, Wessex: (Q19): 529, (Q20): 529.

- In terms of the modes of transport used in the last 12 months and used most frequently, the pattern is very similar. Around two-fifths of FirstGroup passengers have used a 'car as a passenger' in the last 12 months (37%) and a similar proportion indicates it is the most frequently used alternative (42%). Just under a third have used the 'train' in the last 12 months (30%) and 32% identify this mode as the most frequently used mode.
- Over a third of FirstGroup passengers have not used any of the other modes of transport listed (35%).

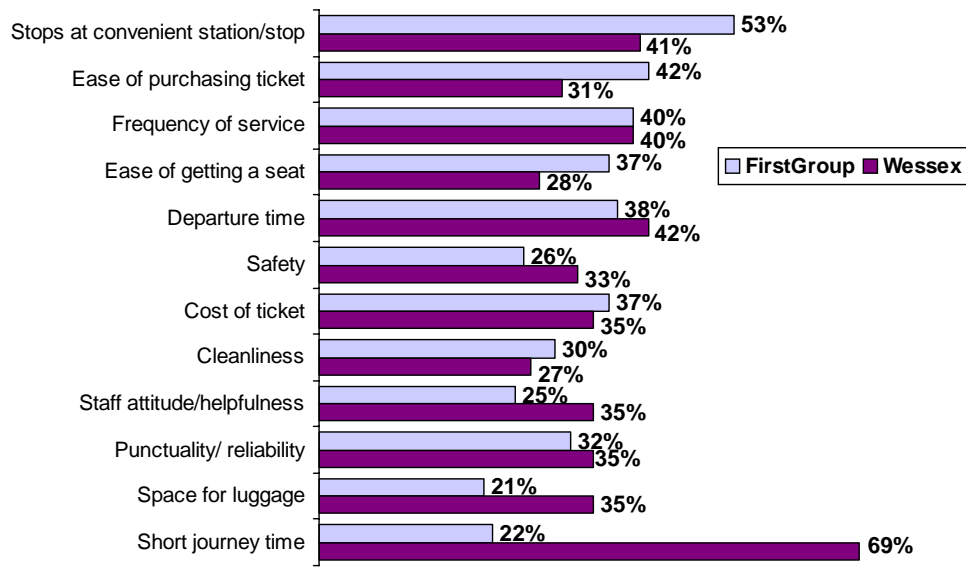
Use of Other Transport Types on this Journey – Wessex Trains



Base: All respondents (Q19): 529, (Q20): 529.

- In terms of the modes of transport used in the last 12 months and used most frequently, the pattern is fairly similar. A third of Wessex passengers have used a 'car as a driver' in the last 12 months (33%) and 27% indicate it is the most frequently used alternative.
- Just under a third have used a 'car as a passenger in the last 12 months (29%) and 23% have used a 'bus' in the last 12 months, although only 17% and 16% respectively identify these as the most frequently used alternative mode of transport in the last 12 months.
- Over a third of Wessex Trains passengers have not used any of the alternative modes of transport listed in the last 12 months (35%).

Comparison of Current with Alternative Transport Used Most in Last 12 Months: those indicating it is better/much better

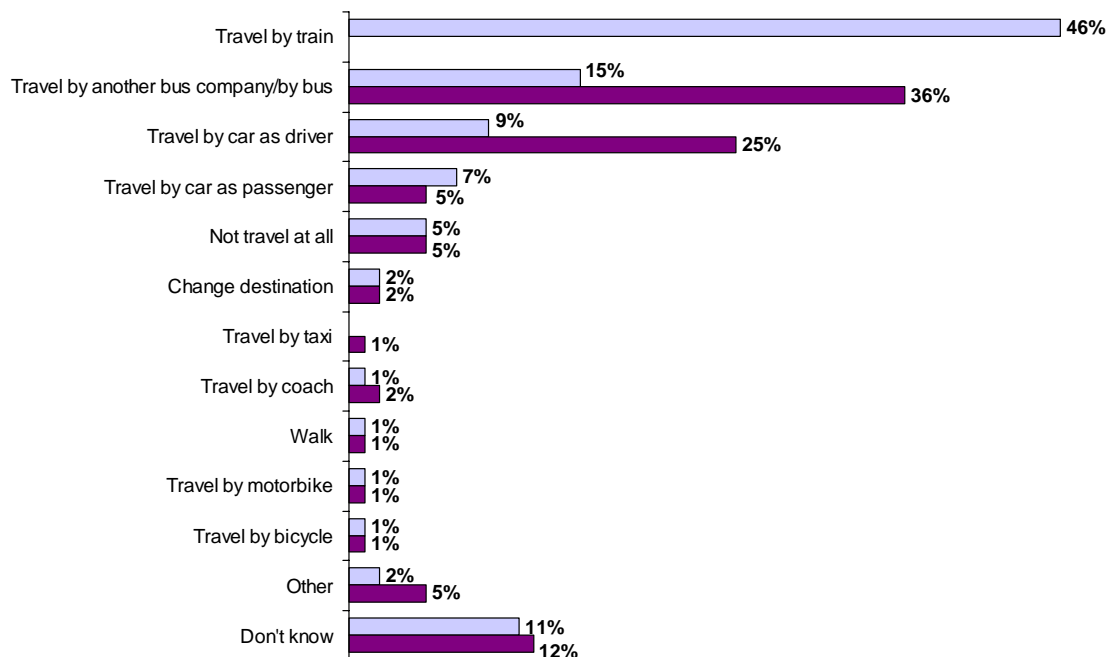


Base: All respondents expressing an opinion (Q21): FirstGroup: Ease of purchase: 220, Cost of ticket: 239, Frequency of service: 242, Departure time: 236, Punctuality/reliability: 245, Ease of getting seat: 238, Space for luggage: 214, Staff attitude & helpfulness: 221, Safety: 222, Cleanliness: 236, Stops at convenient stop: 248, Short journey time: 245, Wessex: Ease of purchase: 222, Cost of ticket: 234, Frequency of service: 249, Departure time: 250, Punctuality/reliability: 256, Ease of getting seat: 258, Space for luggage: 233, Staff attitude & helpfulness: 217, Safety: 248, Cleanliness: 246, Stops at convenient stop: 253, Short journey time: 280.

- When asked how their current transport compares to their most frequently used alternative, over half the FirstGroup passengers indicate that it is better or much better in terms of 'stops at convenient station/stop' (53%), which is also the factor identified as being of most importance.
- The majority of Wessex Trains passengers believe that the trains are better or much better in terms of the 'short journey time' (69%), once again the most important factor to these passengers.

5.5 Actions if Situation Changed

Most Likely Action if FirstGroup/Wessex No Longer Operated on this Route

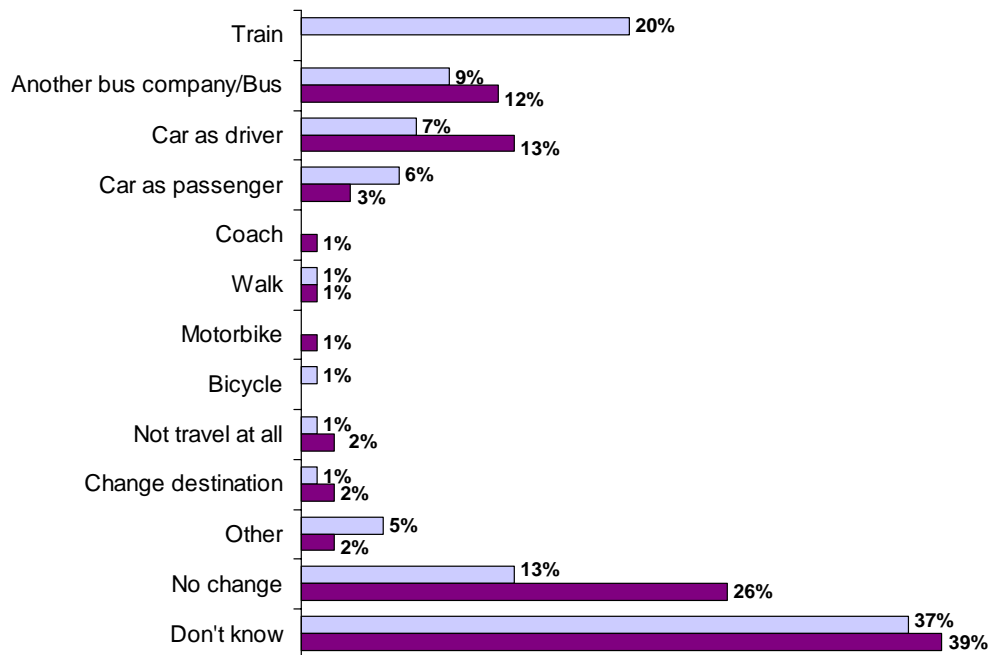


Base: All respondents (Q18): FirstGroup: 482, Wessex: 529.

- In the event that FirstGroup no longer operated on the route, almost half the passengers surveyed would 'travel by train' instead (46%). The next most frequently mentioned alternative is to 'travel by another bus company', identified by 15% of FirstGroup passengers.
- If Wessex Trains no longer operated on the route¹, 36% would 'travel by bus' and 25% would 'travel by car as driver'.
- 11% of FirstGroup passengers are unsure as to what they would do if FirstGroup no longer operated and 12% of Wessex passengers are unsure of what action they would take in the event that Wessex Trains no longer operated on the route.

¹ Wessex travellers were not explicitly asked to specify train as an alternative since Wessex offered the only train service for most journeys and otherwise the only frequent train service.

Most Likely Action if FirstGroup/Wessex Fares Increased by 5%

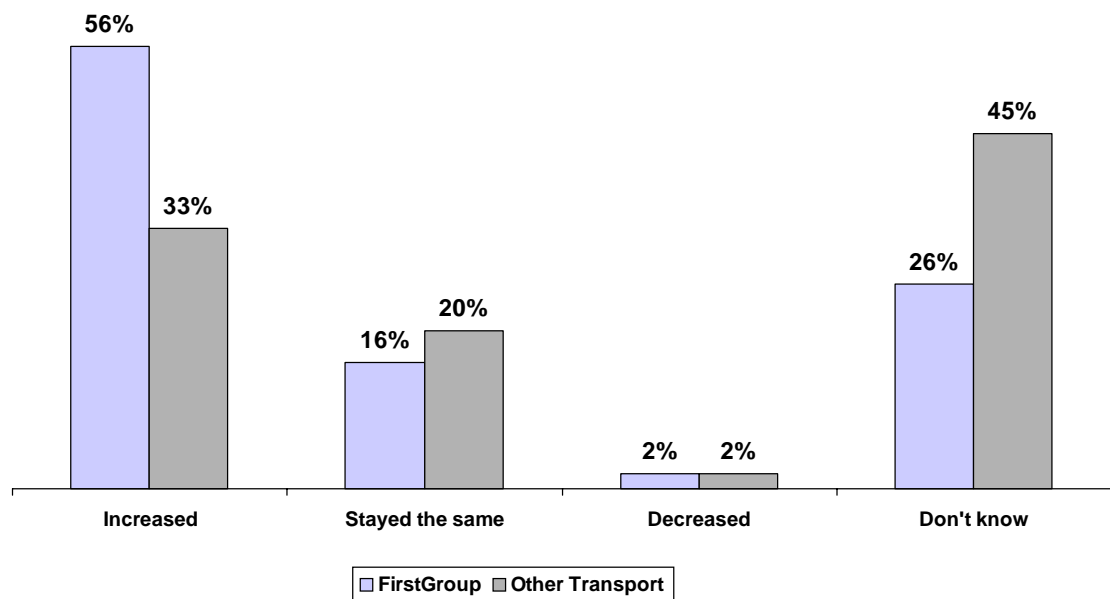


Base: All respondents (Q24): FirstGroup: 482, Wessex: 529.

- In the event that FirstGroup fares increased by 5%, a fifth of passengers say that they would switch to the 'train' (20%). However, over a third do not know what action they would take (37%).
- In the event that Wessex Trains fares increased by 5%, 13% would switch to using a 'car as a driver' and 3% would switch to using a 'car as a passenger'. A further 12% would switch to using the 'bus'. However 39% of passengers on Wessex Trains do not know what they would do.
- Only 13% of FirstGroup passengers say that they would not change their mode of transport and 26% of Wessex passengers would not change their mode of transport in the event of a fare increase.

5.6 Perception of Fare Changes

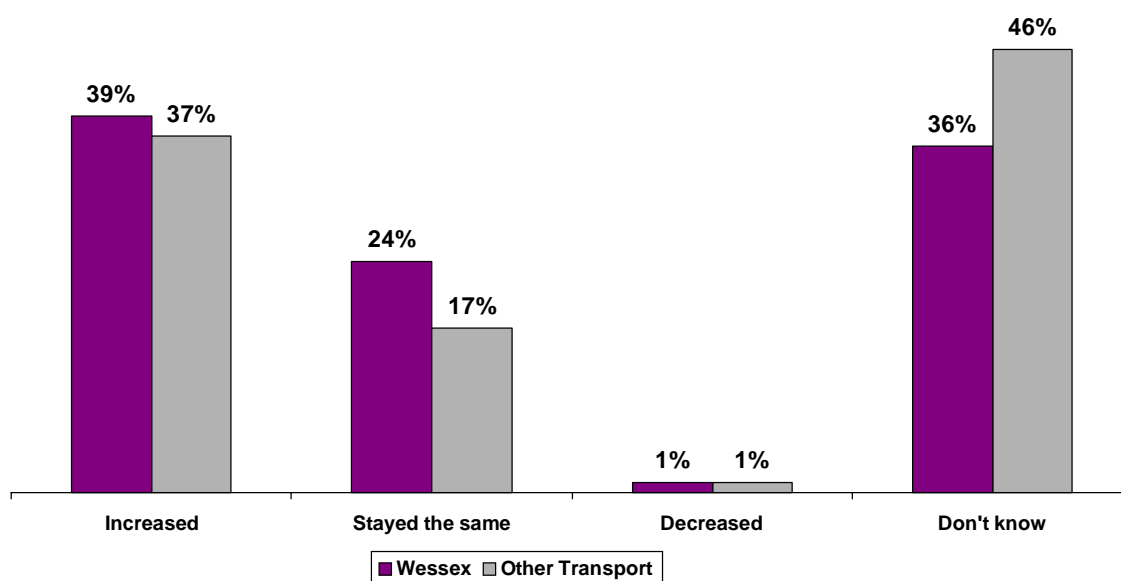
Perception of Changes to Price of Ticket on this **FirstGroup** Service and to Other Transport on Same Route Over Last 12 Months



Base: All respondents (Q22/Q23): 482.

- Over half the FirstGroup passengers believe that the fares on FirstGroup have 'increased' in the last 12 months (56%), whereas only 33% believe that there has been an increase on other modes of transport on the same route over the same period.
- 16% of FirstGroup passengers believe that the fares have 'stayed the same' and this increases to 31% amongst those purchasing a 'concession return'.
- A fifth believe that fares on other modes have 'stayed the same'.
- A quarter of FirstGroup passengers do not know if the fares have changed at all on FirstGroup and 45% are unsure as to whether fares have changed on other modes of transport on the same route.

Perception of Changes to Price of Ticket on this **Wessex** Service and to Other Transport on the Same Route Over Last 12 Months



Base: All respondents (Q22/Q23): 529.

- Almost two-fifths of the Wessex Trains passengers believe that the fares on Wessex have 'increased' in the last 12 months (39%) and this increases to 49% amongst passengers that have purchased a 'period/season ticket'. A similar proportion believe that there has been an increase in fares (37%) on other modes of transport on the same route over the same period.
- A quarter of Wessex passengers believe that Wessex Trains fares have 'stayed the same' (24%) and 17% believe that fares on other modes have 'stayed the same'.
- Over a third of Wessex passengers do not know if the fares have changed at all on Wessex (36%) and 46% are unsure as to whether fares have changed on other modes of transport on the same route.

Appendix 1 - Questionnaire

A slightly different questionnaire was used for FirstGroup bus and Wessex Trains passengers to reflect the different references required to train and bus, however the below questionnaire has been adapted for the purpose of this report to show the differences.

HOW TO COMPLETE THIS QUESTIONNAIRE

Please complete the questionnaire by putting a tick in the appropriate box or, where relevant, writing in an answer in the space provided.

SCREENERS	
<i>Dear Passenger,</i>	
<i>Thank you for taking part in this important survey that is being carried out on behalf of the Competition Commission. Please note that this is an anonymous survey and none of the information you provide will be used to identify you and we will not contact you in the future. We are interested in your experience and opinions regarding First Group Bus/Wessex Trains services. The questions below relate to the journey you were making when you were handed this questionnaire.</i>	
INTERVIEWER TO RECORD	
S1:	Where did you get on the bus/train? CHECK AND WRITE IN & CONTINUE IF ORIGIN ON SHEET
.....	
S2:	Which bus/train station/stop will you leave from today? CHECK AND WRITE IN & CONTINUE IF DESTINATION ON SHEET
.....	
S3:	Is this the only bus/train you will be travelling on as part of this journey, or will you change to another bus/train?
Yes, only bus/train	<input type="checkbox"/> 1 CONTINUE
No, another	<input type="checkbox"/> 2 CLOSE
S4:	Did you personally decide which ticket to purchase for your journey today?
Yes	<input type="checkbox"/> 1 CONTINUE
No	<input type="checkbox"/> 2 CLOSE
Don't know	<input type="checkbox"/> 3 CLOSE
S5:	Did you buy your ticket for this bus/train separately, or as part of a package (e.g. including tickets for your onward journey)?
Yes, purchased separately	<input type="checkbox"/> 1 CONTINUE
No, part of a package	<input type="checkbox"/> 2 CLOSE
Don't know	<input type="checkbox"/> 3 CLOSE

PART 1 - CURRENT JOURNEY INFORMATION

Q1. Where did you start your journey from immediately before getting on this bus/train today?
PLEASE TICK ONE BOX ONLY

- | | | |
|--|--------------------------|----|
| Home | <input type="checkbox"/> | 1 |
| Work | <input type="checkbox"/> | 2 |
| Shopping | <input type="checkbox"/> | 3 |
| School/College | <input type="checkbox"/> | 4 |
| Sports centre/sporting event | <input type="checkbox"/> | 5 |
| Visiting friends/relatives | <input type="checkbox"/> | 6 |
| Visitor attraction (museum/gallery/exhibition) | <input type="checkbox"/> | 7 |
| Theatre/cinema | <input type="checkbox"/> | 8 |
| Other (Please write in) | <input type="checkbox"/> | 29 |

Q2. What mode(s) of transport did you use to get from your starting point (mentioned in Q1) to this bus/train today?

- | | | |
|-------------------------|--------------------------|----|
| Train | <input type="checkbox"/> | 1 |
| Bus | <input type="checkbox"/> | 2 |
| Coach | <input type="checkbox"/> | 3 |
| Car as passenger | <input type="checkbox"/> | 4 |
| Car as driver | <input type="checkbox"/> | 5 |
| Bicycle | <input type="checkbox"/> | 6 |
| By foot/walking | <input type="checkbox"/> | 7 |
| London Underground | <input type="checkbox"/> | 8 |
| Tram | <input type="checkbox"/> | 9 |
| Taxi | <input type="checkbox"/> | 10 |
| Rental Car | <input type="checkbox"/> | 11 |
| Motorbike | <input type="checkbox"/> | 12 |
| Other (Please write in) | <input type="checkbox"/> | 29 |

Q3. And what is your destination immediately after leaving the bus/train today?
PLEASE TICK ONE BOX ONLY

- | | | |
|--|--------------------------|----|
| Home | <input type="checkbox"/> | 1 |
| Work | <input type="checkbox"/> | 2 |
| Shopping | <input type="checkbox"/> | 3 |
| School/College | <input type="checkbox"/> | 4 |
| Sports centre/sporting event | <input type="checkbox"/> | 5 |
| Visiting friends/relatives | <input type="checkbox"/> | 6 |
| Visitor attraction (museum/gallery/exhibition) | <input type="checkbox"/> | 7 |
| Theatre/cinema | <input type="checkbox"/> | 8 |
| Other (Please write in) | <input type="checkbox"/> | 29 |

Q7. And how often do you travel on this particular bus/train route you are using today?

PLEASE TICK ONE BOX ONLY

- 5 or more times a week 1
- 3-4 times a week 2
- Twice a week 3
- Once a week 4
- Once a fortnight 5
- Once a month 6
- Once a year 7
- Less than once a year 8
- First time travelling between these points 9

Q8. How long have you been using the bus/train route you are using today?

PLEASE TICK ONE BOX ONLY

- Less than 1 month 1
- 1 - 5 months 2
- 6 - 11 months 3
- 1 - 2 years 4
- 3 - 4 years 5
- 5 or more years 6
- Can't remember 7
- Don't know 8

Q9. Which one of the following best describes the main purpose of your journey today?

PLEASE TICK ONE BOX ONLY

- Daily commuting journey to/from work, school or college 1
- Less frequent commuting to/from work, school or college 2
- Visiting friends/ relatives 3
- To/ from holiday or short break 4
- Other leisure (Shopping, sports event, concert, theatre or day trip) 5
- Employers business (Including self-employed travelling on business) 6
- Obligatory personal business (e.g. wedding, funeral, job interview) 7
- Other reason (Please write in)..... 29

PART 2 - COST OF YOUR TICKET

Q10. Which kind of ticket did you purchase for yourself for this journey?

PLEASE TICK ONE BOX ONLY

- Adult single/standard day single 15
- Child single/standard day return 16
- Concession Single/cheap day return 17
- Adult return/First class day single 18
- Child return/First class day return 19
- Concession return/ [None] 20
- Period/ Season ticket/Period/season ticket 21
- Other (Please write in) 59

Q11. Please write in below how much your own bus/train ticket cost for this journey today?

£ :

Q12. Which of these statements best describes the cost of your bus/train ticket for this journey today? Please think about the total cost of your journey including any other transport you may be using.

PLEASE TICK ONE BOX ONLY

- It is the total cost of the journey 1
- It is over half of the cost of the journey 2
- It is about half of the cost of the journey 3
- It is less than half of the cost of the journey 4
- It is a very small part of the cost of the journey 5
- Don't know 6

Q13. Are you aware that there is a train/bus service connecting the points you are travelling between today?

PLEASE TICK ONE BOX ONLY

- I am not aware of this train/bus service 1
- I am aware of this train/bus service, but didn't consider travelling on it today 2
- I considered travelling on this train/bus service today, but chose not to 3
- No opinion 4

Q14. Which do you think is the most expensive transport service connecting the points you are travelling between today?

PLEASE TICK ONE BOX ONLY

- Train 1
- Bus 2
- All the same/no difference 7
- Don't know 8

Q15. Reasons for choosing FirstGroup Bus/Wessex Trains: In the table below, for each feature listed, please tick the box which best describes if this feature was important or not important in your choice of this First Group bus/Wessex Trains service.

	Very Important	Fairly important	Neither Important nor unimportant	Fairly Unimportant	Not important at all	No opinion
Ease of purchasing ticket for journey	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Cost of ticket	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Frequency of service	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Departure time	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Punctuality/ reliability	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Ease of getting a seat	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Space for luggage	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Staff attitude and helpfulness	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Safety	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Cleanliness	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Stops at convenient station/stop	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Short journey time	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6

Q16. What is your most important reason for travelling on this First Group bus/Wessex Trains service today? PLEASE TICK ONE ONLY

- Ease of purchasing ticket for journey 1
- Cost of ticket 2
- Frequency of service 3
- Departure time 4
- Punctuality and reliability 5
- Ease of getting a seat 6
- Space for luggage 7
- Staff attitude and helpfulness 8
- Safety 9
- Cleanliness 10
- Stops at a convenient station/stop 11
- Short journey time 12
- None of the above 29

Q17. How easy or difficult would it be for you to permanently change to using each of the following types of transport to make this particular journey, instead of using the First group bus/Wessex Trains? Please think about cost, journey time and overall convenience.

	Very Easy	Quite easy	Neither easy/ difficult	Quite difficult	Very difficult	No opinion
Train/[None]	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Coach/Coach	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Car as driver/ Car as driver	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Car as passenger/Car as passenger	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Rental car/ Rental car	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Other bus company/Bus	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Taxi/ Taxi	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Motorbike/ Motorbike	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Bicycle/ Bicycle	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6

Q18. If First Group/Wessex Trains no longer operated a bus /train service on this route, what would you be most likely to do instead?

PLEASE TICK ONE BOX ONLY

- Travel by train/[None] 1
- Travel by another bus company/Bus 3
- Travel by car as driver 4
- Travel by car as passenger 5
- Travel by rental car 6
- Travel by taxi 7
- Travel by coach 9
- Walk 10
- Travel by motorbike 11
- Travel by bicycle 12
- Not travel at all 13
- Change destination 14
- Other (Please write in) 29
- Don't know 30

Q19 Have you used any other types of transport to make this journey in the last 12 months?

- Travelled by train/[None] 1
- Travelled with a different bus company/Bus 3
- Travelled by car as driver/ Travelled by car as driver 4
- Travelled by car as passenger/Travelled by car as passenger 5
- Travelled by rental car/Travelled by rental car 6
- Travelled by taxi/Travelled by taxi 7
- Travelled by coach/Travelled by coach 9
- Other (Please write in) 29
- None of the above 30 GO TO Q 22

Q20 Which ONE of the other types of transport you mentioned at Q19 did you use most often to make this journey in the last 12 months?

PLEASE TICK ONE BOX ONLY

- Travelled by train/[None] 1
- Travelled with a different bus company/Bus 3
- Travelled by car as driver/ Travelled by car as driver 4
- Travelled by car as passenger/Travelled by car as passenger 5
- Travelled by rental car/Travelled by rental car 6
- Travelled by taxi/Travelled by taxi 7
- Travelled by coach/Travelled by coach 9
- Other (as above) 29

Q21. How does the First Group bus/Wessex Train compare with the type of transport that you mentioned in question 20? Is the First Group bus/Wessex Train better or worse in terms of ...

The First Group bus/Wessex Trains is:	Much better	Better	Neither Better nor Worse	Worse	Much Worse	No opinion
Ease of purchasing ticket for journey	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Cost of ticket	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Frequency of service	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Departure time	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Punctuality/ reliability	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Ease of getting a seat	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Space for luggage	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Staff attitude and helpfulness	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Safety	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Cleanliness	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Stops at convenient station/stop	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Short journey time	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6

ALL PASSENGERS PLEASE ANSWER
PART 3 - THE COST OF YOUR JOURNEY AND ALTERNATIVES

Q22. In your opinion has the price of a ticket on this particular First Group bus /Wessex Trains service increased, decreased or stayed the same over the last 12 months? There are no right or wrong answers we are just interested in your opinion

PLEASE TICK ONE BOX ONLY

- Increased 1
- Decreased 2
- Stayed the same 3
- Don't know/can't remember 4

Q23. And in your opinion has the price of a ticket for other modes of transport connecting the points you are travelling between today increased, decreased or stayed the same over the last 12 months? There are no right or wrong answers we are just interested in your opinion

PLEASE TICK ONE BOX ONLY

- Increased 1
- Decreased 2
- Stayed the same 3
- Don't know/can't remember 4

Q24. Please think about the fare you have paid to First Group/Wessex Trains for your bus/train ticket today, (including season tickets if relevant). If all of First Group's bus/Wessex Trains fares went up by 5% (that is, 5p in every £), what would you be most likely to do - or would you not permanently change your travel behaviour in any of the ways below?

PLEASE TICK ONE BOX ONLY

- Travel by train/[None] 1
- Travel by another bus company/Bus 3
- Travel by car as driver/Travel by car as driver 4
- Travel by car as passenger/Travel by car as passenger 5
- Travel by rental car/Travel by rental car 6
- Travel by taxi/Travel by taxi 7
- Travel by coach/Travel by coach 9
- Walk/Walk 10
- Travel by motorcycle/Travel by motorcycle 11
- Travel bicycle/Travel bicycle 12
- Not travel at all/Not travel at all 13
- Change destination/Change destination 14
- No change/No change 28
- Other (Please write in) 29
- Don't know 30

Finally, in order to help us understand your answers, please could you answer the following questions.

Q25. What gender are you?

Male 1

Female 2

Q26. What age group are you in?

16-24 1

25-34 2

35-44 3

45-54 4

55-59 5

60-64 6

65 or over 7

Q27. And how many people including yourself are in your group today?

	One	Two	Three	Four	Five +	None
Adults 16+	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
Children 0-5	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Children 6-10	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
Children 11-15	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6

Q28. How would you describe your working status?

Employed full-time 1

Employed part-time 2

Self-employed 3

Full time home-maker 4

Permanently retired 5

Unemployed and seeking work 6

Full-time higher education 7

Attend school or other full-time education (not higher) 8

Long-term sick or disabled 9

Q29. Where do you live?

- England (London) 1
- England (South East) 2
- England (East) 3
- England (South West) 4
- England (West Midlands) 5
- England (East Midlands) 6
- England (Yorkshire & Humberside) 7
- England (North West) 8
- England (North East) 9
- Wales 10
- Scotland 11
- Northern Ireland 12
- Outside UK 13

Q30. What is your current UK postcode?

Stops

FirstGroup: Bath - Bristol

Route X39

X39 Bristol Temple Meads

Rupert Street
Union Street
Colston Avenue
Baldwin Street
Baldwin Street - Bristol Bridge
Victoria Street - Bristol Bridge
Victoria Street - Redcliffe Street
Victoria Street - TGWU
Temple Gate
Totterdown Bridge

Oldfield Park

Newbridge Road, Old Newbridge Hill
Newbridge Road, Holmlea park East/ West
Newbridge Road, Charmouth Road
Newbridge Road, Apsley Road
Newbridge Road, Vet Centre
The Weston - Newbridge Road/ Upper Bristol Road
Upper Bristol Road - Windsor Castle/ Windsor Villas
Upper Bristol Road - Park Lane
Upper Bristol Road - Comfortable Place
Upper Bristol Road - Nile Street

Bath Spa

Monmouth Place
James Street West - Green Park Stn
James Street West - Kingsmead Square
Westgate Buildings
Bath Bus Station

Route 339

339 Bristol Temple Meads

Rupert Street
Union Street
Colston Avenue
Baldwin Street
Baldwin Street - Bristol Bridge
Victoria Street - Bristol Bridge
Victoria Street - Redcliffe Street
Victoria Street
Temple Gate
Totterdown Bridge

Keynsham -

Keynsham Cemetery, Stockwood Vale
Bristol Road, The Crown
Keynsham Church
Post Office, High Street
Bath Hill, Memorial Park
Bath Road, The Talbot
Bath Road, Unity Road

Oldfield Park

Newbridge Road, Old Newbridge Hill
Newbridge Road, Holmlea park East/ West
Newbridge Road, Charmouth Road
Newbridge Road, Apsley Road
Newbridge Road, Vet Centre
The Weston - Newbridge Road/ Upper Bristol Road
Upper Bristol Road - Windsor Castle/ Windsor Villas
Upper Bristol Road - Park Lane
Upper Bristol Road - Comfortable Place
Upper Bristol Road - Nile Street

Bath Spa

Monmouth Place
James Street West - Green Park Stn
James Street West - Kingsmead Square
Westgate Buildings
Bath Bus Station

Route 332

332 Bristol Temple Meads

Rupert Street
Wellington street
Bond Street
Old Market, Bond Street
Old Market Street
Lamb Street
Easton Road, Lawrence Hill
Lawrence Hill Station

Oldfield Park

Kelston Road, Partis College
Newbridge Hill, Pen Lea Road
Evelyn Road
Newbridge Hill, Neston House
Chelsea Road
The Weston - Newbridge Road/ Upper Bristol Road
Upper Bristol Road - Windsor Castle/ Windsor Villas
Upper Bristol Road - Park Lane
Upper Bristol Road - Comfortable Place
Upper Bristol Road - Nile Street

Bath Spa -

Monmouth Place
James Street West - Green Park Stn
James Street West - Kingsmead Square
Westgate Buildings
Bath Bus Station

Super-Mare

Route X1

X1 Bristol Temple Meads
 Bristol Bus Station
 Hippodrome
 @ Bristol
Nailsea and Backwell
 Backwell Cross Roads
Worle
 St Georges Turn
Worle
 Priory School, Bristol Road
 New Bristol Road, West Wick
 Summer Lane, New Bristol Road
Worle
 Moor Lane, New Bristol Road
Weston Milton -
 Annandale Avenue, New Bristol Road
 Mead Vale, Locking Road
 Chelswood Avenue, Locking Road
 Borough Arms, Locking Road
 Macs Garage, Locking Road
Weston-super-Mare
 Laburnham Road, Locking Road
 Birchwood Avenue, Locking Road
 Post Office, Locking Road
 Stafford Road, Locking Road
 Locking road, Swiss Road
 Regent Street
 High Street
 Marine Parade
 Alexandra Parade
 Oxford Street
 Wilton Gardens
 Ellenborough Park, Walliscote Road
 St Pauls Church/ Severn Road Walliscote Road
 Clarence Road, Walliscote Road

Route 350

- 350 Bristol Temple Meads
Bristol Bus Station
Hippodrome
@ Bristol
- Nailsea and Backwell
Flax Bourton, Post Office Lane
Stancombe Lane
Farleigh, The George
Farleigh, Faifield Way
Backwell Leisure Centre
Backwell Cross Roads
- Yatton
High Street, Rock Road
High Street, Chescombe Road
High Street, Cherry Grove
Market Inn, North End
Roundabout, Hawthorn Crescent, North End
Frost Hill, Claverham Cricket Club/ Henley Park
- Worle -
St Georges Turn
Sainsbury's
Queensway, Becket Road
Queensway, St Marks Church
Queensway Underpass
Cornwallis Avenue
Queensway, Anson Road
The Quarry, Bramble Road
Worle, Pilgrims Way
- Weston Milton
Church Road, Hawthorne Hill
Church Road, Whittington Drive
Spring Hill, Edgecombe Avenue
The Windsor, Upper Bristol Road
Milton Brow, Upper Bristol Road
- Weston-super-Mare
Cemetary, Bristol Road Lower
Arundell Road, Bristol Road Lower
Stafford Place, Arundell Road
Alfred Street
Boulevard
Waterloo Street
College, Knightstone Road
Royal Parade
Regent Street

Route 351

- 351 Bristol Temple Meads
Bristol Bus Station
Hippodrome
@ Bristol
- Nailsea and Backwell
Flax Bourton, Post Office Lane
Stancombe Lane
Farleigh, The George
Farleigh, Faifield Way
Backwell Leisure Centre
Backwell Cross Roads
- Yatton
Frost Hill, Claverham Cricket Club/ Henley Park
- Worle -
St Georges Turn
Sainsburys
Priory School, Wansborough Road
Lisle, Wansborough Road
Kelston Road, Wansborough Road
Castle Batch School, Becket Road
Becket road, Finmere Gardens
Becket Road, Tudor Road
Magdalen Way
Queensway Underpass
Cornwallis Avenue
Queensway, Anson Road
The Quarry, Bramble Road
Worle, Pilgrims Way
- Weston Milton -
Church Road, Hawthorne Hill
Church Road, Whittington Drive
Spring Hill, Edgecombe Avenue
The Windsor, Upper Bristol Road
Milton Brow, Upper Bristol Road
- Weston-super-Mare-
Cemetary, Bristol Road Lower
Arundell Road, Bristol Road Lower
Stafford Place, Arundell Road
Alfred Street
Albert Quadrant
Alexandra Parade
Regent Street
Oxford Street
High Street

Route 353

- 353 Bristol Temple Meads -
Bristol Bus Station
Hippodrome
@ Bristol
- Nailsea and Backwell -
Flax Bourton, Post Office Lane
Stancombe Lane
Farleigh, The George
Farleigh, Faifield Way
Backwell Leisure Centre
Backwell Cross Roads
- Yatton -
High Street, Rock Road
High Street, Chescombe Road
High Street, Cherry Grove
Market Inn, North End
Roundabout, Hawthorn Crescent, North End
Frost Hill, Claverham Cricket Club/ Henley Park
- Worle -
St Georges Turn
- Worle -
Priory School, Bristol Road
New Bristol Road, West Wick
Summer Lane, New Bristol Road
- Worle -
Moor Lane, New Bristol Road
- Weston Milton -
Annandale Avenue, New Bristol Road
Mead Vale, Locking Road
Chelswood Avenue, Locking Road
Borough Arms, Locking Road
Macs Garage, Locking Road
- Weston-super-Mare -
Laburnham Road, Locking Road
Birchwood Avenue, Locking Road
Post Office, Locking Road
Stafford Road, Locking Road
Locking road, Swiss Road
Regent Street
High Street
Marine Parade
Marine parade
Royal Parade
Cabot Hotel
Knightstone
Rozel Hotel
Westcliffe Annexe

Wessex Trains: Bath - Bristol

Bristol Temple Meads
Keynsham
Oldfield Park
Bath Spa

Wessex Trains: Bath - Weston-Super-Mare

Bristol Temple Meads
Parson Street
Nailsea & Backwell
Yatton
Worle
Weston Milton
Weston-super-Mare