



Regeneration and Development Panel
Tuesday, 25th July, 2017 at 6.00 pm
in the Sailing Club, Hunstanton

Reports marked to follow on the Agenda and/or Supplementary Documents

1. **Background Document – Visit England – Welcoming Coaches and Groups (Pages 2 - 17)**

Attached background document which may be useful for Members to read in advance of the meeting.

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VisitEngland 

Advice Document

Welcoming Coaches and Groups



The coach plays a vital role in carrying millions of visitors to destinations, attractions and hotels throughout England. Coaches and groups are a significant market and for many, the most important element to building a buoyant local tourism economy and making visitor attractions into successful businesses.

Coaches are one of the cleanest forms of transport and can reduce congestion. A coach carrying 50 passengers takes the place of more than 20 cars, freeing up space in car parks. Their passengers help the local economy too, with domestic visitors on organised coach tours (day trips and overnight stays) spending £1.4 billion.

This advice document and examples of best practice has been produced by VisitEngland in association with the Coach Tourism Council. It has been designed to help Destination Organisations, attractions and hotels understand the needs of the coach and its passengers and how to welcome what for many is an untapped yet profitable market.

VisitEngland is the country's national tourist board responsible for driving forward England's Strategic Framework for Tourism with industry partners.

VisitEngland works in partnership to lead the development of a thriving tourism industry, supporting its national and local partners to achieve economic growth and increase investment and employment by encouraging the development of excellent visitor experiences and effective business practices.

The Coach Tourism Council was established 25 years ago to promote travel and tourism by coach. Today it has 300 members, split equally between coach tour operators from across the UK and industry suppliers.



Windsor Castle, Berkshire

The coach market

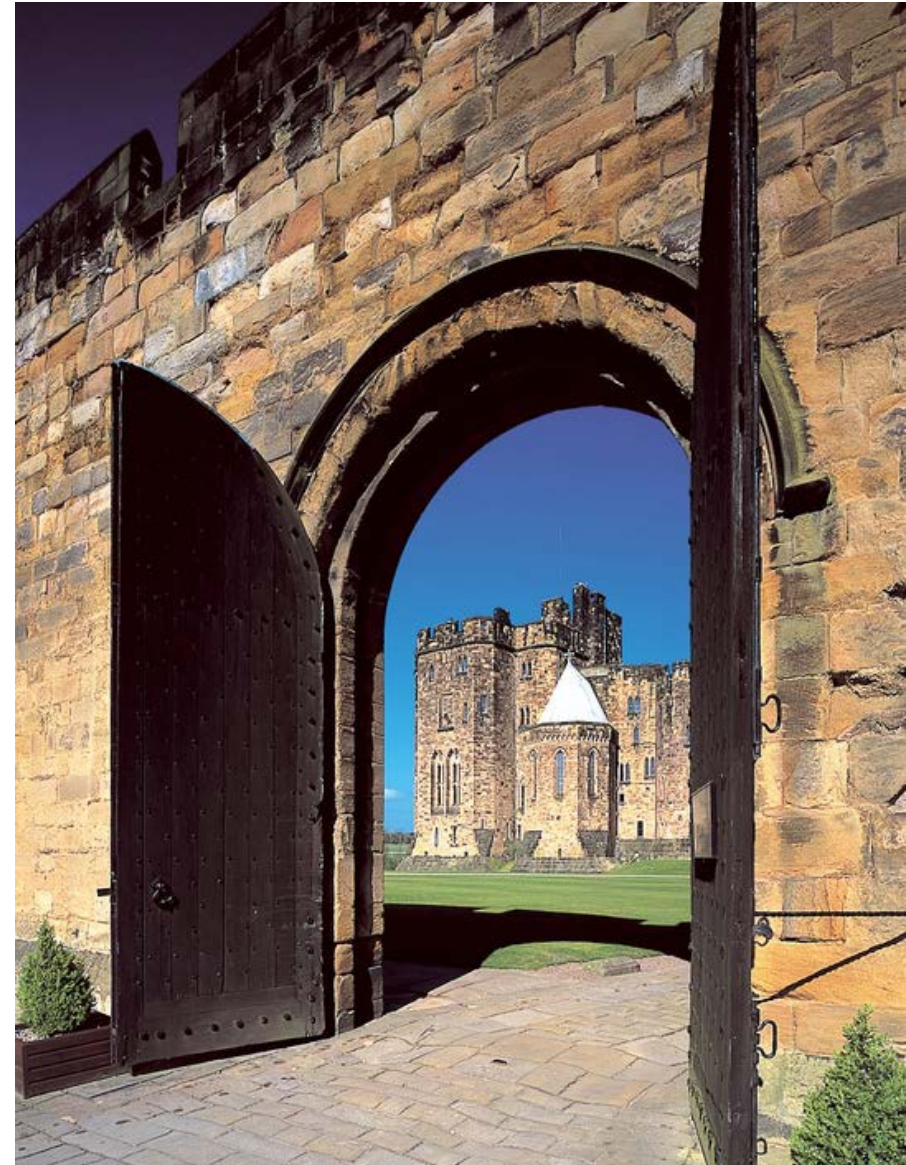
CURRENT STATUS

- In 2012 almost 2.4 million overnight trips were taken by domestic residents as part of an organised coach tour in Great Britain, accounting for 8.6 million overnight stays, contributing £617 million to the domestic tourism economy. When overnight trips using regular coach and bus services are included, this figure rises to £1.4 billion (VisitEngland/Great Britain Tourism Survey)
- The increasing popularity of day trips in Great Britain saw a further 18 million day trips taken in 2012 as part of an organised coach tour, with spending of £766million. A further 136 million day trips were taken using a regular bus or coach service for transport, generating another £4bn in spending (VisitEngland/Great Britain Day Visits Survey)
- The average spend by domestic coach passengers on overnight trips in 2012 was £72 a day, compared to average daily expenditure of £62 across all overnight trips. These findings contradict the commonly held notion that coach visitors are of lower economic value to destinations (VisitEngland/Great Britain Tourism Survey)
- Latest IPS data from the 2013 International Passenger Survey shows that private coaches are used on 4% of inbound trips. The survey reveals that school age visitors are the most frequent users of private coaches from the inbound market and that China and India were among only a handful of markets where one in ten visits encompassed using a private coach
- London's theatres have enjoyed a boom in the last decade and in no small way thanks to the number of people going by coach, who account for 15% of the 14 million plus theatre seats sold annually (Society of London Theatres)
- The Association of Leading Visitor Attractions (ALVA) reports that visitor numbers to attractions are continuing to increase, with outdoor attractions seeing an 8% rise in sales in 2013 and indoor attractions an increase of 5%. (ALVA figures as reported at the 2014 Coach Holiday Conference by ALVA director Bernard Donoghue). 5 million day trips to visitor attractions in 2012 used an organised coach trip as transport and a further 6.7 million a regular bus or coach (VisitEngland/Great Britain Day Visits Survey)
- Historic cities benefit from coach tourism as it limits the influx of cars. A survey completed by the Confederation of Passenger Transport UK (CPT) in Bath, carried out on behalf of the CPT, revealed 17% of visitors arrived to the city on a coach, equating to around 11,000 coaches carrying as many as 450,000 people (Figures for both generated by CPT in its Britain's Coaches – Delivering Prosperity to You – report issued in October 2010)
- Hotels throughout the country rely on coach groups for a large part of their business. Best Western for example, which has more than 220 hotels conducting group business, has enjoyed a 38% increase in coach groups in the last five years. (Best Western figures as stated by Richard Lewis, CE of Best Western, when speaking at the 2014 Coach Holiday Conference)



GROWTH POTENTIAL

- The biggest demand for coach travel comes from retired people. VisitEngland research shows that 48% of those taking overnight trips on organised coach tours are 65+ (VisitEngland/Great Britain Tourism Survey)
- Long term prospects for the industry appear good with the demand for coach travel expected to increase due to the demographic boost of an ageing population. Over the next decade, English society will age steadily, with increasing numbers of people aged over 50 and a rise in the average age of society. Most of this growth is concentrated amongst the over 80s (which will grow by 19% by 2020), but both the 50-64 year olds and 65-79 year old age groups will also see significant growth
- This baby boomer generation (those born between 1946 and 1964) is far more leisure focused (and in many cases, more affluent) than previous generations of older people, and as such will have profound implications for future tourism behaviour in the UK. (VisitEngland Trends Report). They provide both an opportunity and a challenge for the coach sector, as whilst this is the age group where the biggest demand for coach travel comes from, they are also more active and demanding than ever before, meaning coach operators will need to ensure their product offering continues to evolve and improve to meet their changing demands
- A survey carried out by Mail Newspapers in 2013 on behalf of the Coach Tourism Council revealed the potential to attract new customers to coach touring. 16% of Mail readers, the equivalent of 1.3 million people, have never been on a coach tour before, but would consider doing so in the future. When asked about the benefits of coach holiday, 60% said having everything organised for you, 57% indicated value for money, 54% appreciated the stress-free travel, while half enjoyed the touring aspect and visiting multiple attractions
- The Confederation of Passenger Transport UK has a 'Coach Friendly' status scheme which is awarded to cities and towns who can show a real commitment to working with and welcoming coaches to make them must-visit coach destinations. To date, 'Coach Friendly' status has been awarded to just 20 destinations, including Rochester, Stratford-on-Avon, Windsor, Southport, Salisbury, Scarborough, Eden Valley, Chester, Bury, Lichfield, Alnwick Castle, Alnwick Town, Ironbridge, Liverpool, Coventry, Shrewsbury, Chesterfield, Burnham-on-Sea and most recently Devizes. There is much potential therefore for other destinations to tap into this significant market



Alnwick Castle, Northumberland



The coach market

MARKET SEGMENTS

The coach market is split into three sectors:

1. Transport providers:

Companies such as National Express and Megabus provide coach travel from A to B and are generally used by commuters and leisure users who prefer this form of transport to going by train or car.

2. Private hire:

A large number of private hire coach companies and coach tour operators are among more than 1,000 members of the Confederation of Passenger Transport UK (CPT) which represents the bus, coach and light rail industries. Private hire operators are contracted by some coach tour companies to provide coaches for their tours, but the majority are independent companies who provide coaches for corporate clients and businesses, schools and social groups, who plan their own tours for work groups, societies and special interest groups.

3. Tour operators:

The Coach Tourism Council has around 150 coach and wholesaler members who run the majority (more than 70%) of day trips and short breaks to resorts and destinations across England. They include national operators such as Shearings Holidays, Alfa Travel, David Urquhart Travel, Leger and Grand UK, large regional tour companies and smaller family run concerns. Their tours are usually based on a package price to include all travel, hotel accommodation (generally on a half board basis) and entrance tickets to attractions.

THE BENEFITS OF COACH TRAVEL

Many potential customers are unaware of the advantages of travelling by coach:

Relax in comfort

Today leading operators are investing in state-of-the-art, air-conditioned coaches costing between £250,000 - £400,000. Many have the latest internet access, refreshment facilities, video systems and luxury seating. The driver benefits from traction control, anti-lock brakes and electronic stability control. After all, the stars of Premiership football, international rugby teams, Olympic athletes, pop stars and celebrities travel by coach because they demand not just luxury and comfort, but privacy, security and space.

Convenience

Coach passengers can start their tour from near to their home and on many tours will be collected by taxi. They get the personal service of their own driver and the security of being looked after during the tour, without having to worry about getting lost.

Environmentally friendly

Coaches are the most fuel-efficient form of transport; they are six times less polluting than an aircraft, four times cleaner than a car and twice as clean as a train (CPT). Destination Organisations should welcome coaches to help improve and protect their environment. In London, coach operators must comply with the Low Emission Zone (LEZ) covering the Greater London boundary, meaning they have to meet certain emission standards and therefore are one of the cleanest modes of transport for the capital.

Less congestion

Coaches take up less road and car parking space, a coach carrying 50 passengers is the equivalent to more than 20 cars on the road. They help traffic flow and cause fewer hold-ups.

Safety

Coaches are seven times safer than travelling by car (CPT).



Chatsworth, Derbyshire



Liverpool, Merseyside

MARKET CHALLENGES

Coaches and groups are a significant and for many, the most important element to building a buoyant local tourism economy and making visitor attractions into successful businesses. There are however common challenges facing coach operators, destinations and attractions particularly as this large potential market is often ignored or discouraged through a lack of understanding of its requirements.

In recent years some destinations have put up barriers to welcoming coaches. Many have introduced measures to stop coaches having drop-off zones as well as closing central and out of town coach parks. Others have introduced prohibitive parking charges which can add £2 to £5 per person to the cost of a day visit.

This has resulted in coach and group travel organisers removing towns and destinations from their excursions and tour schedules, instead focusing on locations that proactively encourage groups.

Many Destination Organisations have implemented measures to underline a clear commitment to welcoming coaches. The next section of this guidance document explains ways to attract and provide for this important tourism market, drawing on examples of best practice.

Advice for welcoming coach groups

BASIC FUNDAMENTALS

Before even considering whether to target coach tourism, Destination Organisations, attractions and hotels must be able to accommodate the basic requirements of this market.

1. Transport infrastructure

- Is the transport network suitable for coaches i.e. are the roads big enough to accommodate large vehicles?
- Where and how will passengers be dropped-off and picked-up safely?
- If town centre car parks are accessible, introduce dedicated parking spaces for coaches, preferably free of charge
- If coaches cannot use town centre car parks, ensure there is a lay-by or bus stop where the coach can drop-off passengers safely and also pick-up, ideally close to public toilets and refreshment outlets. In Southport for example there are four town centre coach 'set down/ pick up' points

2. Signage

- Is there clear and suitable signage from motorways and main roads along the preferred route to the destination or attraction?
- Are attractions, facilities and services clearly signed within the destination?

It is advisable to carry out an assessment to ensure these fundamentals can be met, so that further investment of time, effort and resource in this area is not wasted.

Once it has been agreed that the basic requirements can be met, in the long term some Destination Organisations may need to commit funds to infrastructure improvements, but in the short term, a number of low cost coach friendly initiatives can be introduced without the need for major investment.



Afternoon tea in a coffee house in Lincoln

SHORT TERM SOLUTIONS

1. As a first step, Destination Organisations and Tourist Information Centres could delegate a member of staff to be the coach group point of contact, to answer calls and deal with questions. Medway for example has a tourism unit dedicated to looking after the needs of visiting coach parties. It will also meet and greet coach parties
2. It is easy and not costly to produce simple information packs on coach facilities, route directions, parking maps and any parking charges. In addition, think about creating a directory of coach friendly cafes, pubs, historic monuments and local attractions. Bournemouth for example has a dedicated groups section on the Bournemouth Tourism official website www.bournemouth.co.uk/lovegroups. It also provides tailor-made itineraries specifically for coach operators and a free group accommodation booking service. Latest news and events information is included in a quarterly newsletter to coach tour planners and it also publishes an annual Group and Coach Travel Guide
3. It is advisable for attractions to have an up-to-date, informative and easy to navigate website and where possible a dedicated group contact to help with queries and bookings
4. Consider substantial group discounts on the standard public entry ticket price which could be set and issued to tour organisers at least nine months in advance. If there are special events, publicise details at least six months, but preferably twelve months in advance
5. Attractions and hotels should plan how they will accommodate coach groups; a convenient set-down and pick-up point close to the entrance to avoid a long walk for passengers; a dedicated member of staff to meet and greet and provide an introductory talk; a gift shop that stays open until the attraction closes; a café which is prepared to accommodate large numbers of visitors at one time; wet weather plans for outdoor attractions; free on-site parking where possible; facilities for coach drivers including refreshments
6. Look to raise your profile through public relations in the specialist coach and groups travel trade press. These magazines are all receptive to hearing about relevant industry news stories – special events, new openings or new initiatives – and remember to include a high quality visually interesting photo
7. Destination Organisations and attractions could work together to organise educational familiarisation trips for coach and group tour planners to showcase their facilities. Ask local hotels who want to attract groups to provide accommodation at free of charge or at special rates
8. Consider exhibiting at national and regional trade shows which provide excellent opportunities to meet buyers. Join an industry body to underline your commitment to welcoming groups. The Coach Tourism Council slogan is ‘Join the coach party’ and it organises several networking events throughout the year which offer the chance to meet and do business with buyers directly



The Godiva Awakes street theatre carnival, Coventry



'Shakespeare Aloud' Actor, Stratford-upon-Avon

LONGER TERM SOLUTIONS

1. When considering how to maximise business from this sector, Destination Organisations and planning departments should have a coherent strategy for integrating coaches and group tourism into long term infrastructure development plans. Many Councils already have plans in place to meet the requirements of the industry. The need for long term planning for coach visitors has been recognised in London for example where Transport for London (TFL) and the Confederation of Passenger Transport (CPT) launched (October 2013) the Tourist Coach Action Plan, a 5 year study which sets out a list of achievable actions and goals designed to improve the experience for coach tour operators/drivers coming into the capital
2. Plan to provide parking for coaches as part of new city/ town centre developments. Ensure roads are wide enough to accommodate coaches as well as local bus services, provide a clearly marked designated area exclusively for coaches for drop-offs and pick-ups, preferably with a shelter and which allows passengers to board and disembark safely. This should be conveniently sited to public toilets, shops, hotels and local attractions. Where possible coaches should also be able to access car parks
3. Acknowledging the pressure on space in town centres, consider including coach parking and facilities in out-of-town car parks. Make allowances for ample, secure coach parking with CCTV, coach and driver facilities, including rest rooms, coach washing and cleaning facilities and preferably all free of charge. Medway Council's Acorn Wharf coach park for example has a dedicated 36 bay coach park with brick built drivers' rest facility, an on-site toilet disposal point with hose pipe and large waste bins for refuse collection, CCTV surveillance cameras and a remote controlled rising bollard system which operates via the council's CCTV system when an attendant is not on duty

Medway

Best practice case studies

Medway is often held up as a best practice example of how a local authority has embraced coaches and invested in providing the service required.

Medway was the first local authority to be awarded the CPT 'Coach Friendly Local Authority' status and has a tourism unit dedicated to looking after the needs of visiting coach parties. Over the past 15 years it has won many more awards both in the UK and abroad and has established a presence on the Continent, in particular in Germany, which has resulted in dozens of coaches stopping in Medway en route to London.

The Acorn Wharf coach park has 36 dedicated parking bays, brick built drivers' rest facility, on-site toilet disposal point with hose pipe and large waste bins for refuse collection, CCTV surveillance cameras and a remote controlled rising bollard system which operates via the council's CCTV system when there is not an attendant is not on duty. This ensures that unauthorised users cannot enter the parking area. Above all coach parking is free.

To complement the coach park, four dedicated coach setting down/pick-up bays are provided at the Rochester Visitor Information Centre located just 200 yards from the coach park. The Visitor Information Centre leads straight onto the historic high street, so drivers can drop-off and collect their passengers in complete safety. The bays are fully wheelchair accessible too.

The centre receives 300,000 visitors per annum, with the vast majority of them arriving by coach. Passenger facilities at the centre include public conveniences, café, inside and outside waiting areas, tourist information service and an art gallery.

Medway is often asked by other Destination Organisations for advice when developing or relocating their own coach parks. Destinations who have consulted Medway include Cardiff, Canterbury, Hastings, Eastbourne, Norwich and Lakeside Shopping Centre.

Rochester Castle, Kent

Southport

Best practice case studies

Southport, Merseyside

The seaside resort of Southport is an example of what towns can do by providing an excellent service to coach operators and group organisers. It was one of the CPT's first 'Coach Friendly Towns' and has won many industry awards for its service.

Southport's offer includes:

- Four town centre coach 'set down/pick-up' points
- Free 'meet & greet' service by Coach Hosts from Easter to the end of September
- Southport Visitor Passports containing money off vouchers for coach visitors
- Secure coach parking for up to 65 vehicles with CCTV and on-site drivers facilities including lounge, kitchen and shower
- Coach Driver's Passport scheme where stickers are collected on each visit and can then be redeemed for high street shopping vouchers
- Discounted tickets to Southport events with free coach parking and admission for the driver
- An annual Travel Trade Guide and e-newsletters 4 times a year
- Travel trade specific pages on its website www.visitsouthport.com
- Travel trade familiarisation visits to showcase the town to coach and group operators

Canterbury

Best practice case studies

Canterbury Cathedral, Kent

Canterbury together with Canterbury Cathedral recognises the importance of providing a welcome service for coaches and groups.

As a destination Canterbury offers:

- A coach terminal in a convenient location for easy access to attractions and the city centre
- Welcome and information facilities for coach passengers at the coach terminal
- Dedicated bus lanes and drop-off facilities if the coach terminal is not within easy walking distance
- Clear signage, leaflets and website information to indicate access routes and coach facilities
- Provision of free promotional material such as images, maps and information for use on website/brochures
- Regular destination 'news & events' updates
- A dedicated travel trade contact

As an attraction Canterbury Cathedral offers:

- Attractive group rates
- Separate, fast processing of groups on arrival
- Pre-bookable time-slots which allow penalty-free flexibility in case of delays
- Easy and efficient booking process and credit facilities (invoicing in arrears)
- Free facilities for driver and tour leader
- Provision of free promotional material such as images, maps and information for use on website/brochures
- Regular 'news & events' updates
- A dedicated travel trade contact



Bournemouth

Best practice case studies

Bournemouth Pier, Dorset

Bournemouth continues to be one of the most popular resorts in the country for coach tour day trips, short breaks and longer stay holidays with a great choice of hotels, shops, sightseeing, leisure activities and evening entertainment, as well as many free festivals which are staged throughout the year.

Bournemouth Tourism and local businesses work together to ensure there is always something new for visitors.

Bournemouth Tourism has a dedicated groups department to provide coach operators with:

- A dedicated groups section on Bournemouth Tourism's official website www.bournemouth.co.uk/lovegroups
- Free group accommodation finding service
- Tailor-made itineraries specifically for coach operators
- Free access to the Bournemouth Image Library
- A quarterly newsletter and annual Group and Coach Travel Guide which has the latest information to help coach groups explore Bournemouth and the surrounding area in a way that suits them. It includes coach specific information including a list of coach parking locations and drop-off and pick-up points
- Social media: Coach tour operators can keep up to date with news for their tours via Bournemouth Tourism on Facebook, Twitter and YouTube

Bournemouth Tourism has been a member of the Coach Tourism Council for many years and attends the annual Coach Holiday Conference. This is an excellent opportunity for Bournemouth Tourism to understand the coach industry, learn more about what they need and network with those who decide where tours go. Bournemouth Tourism and its local trade partners also attend a number of coach and group related exhibitions each year to underline their commitment to welcoming coaches and groups.

London

Best practice case studies

EDF Energy London Eye, London

Coach travel has long provided an important component to transport and tourism in London. It offers a dedicated, almost door-to-door service, at a relatively low-cost. One of its strengths has been the ability to take people exactly where they want to go and this is particularly important for mobility impaired people, older people, school children and tourists travelling in groups.

Although it has always been the most popular destination by far for coach tours, for many years London failed to recognise the importance of coaches coming into the capital. Westminster and Camden Councils in particular faced accusations of driving coach traffic out by removing drop-off points and coach parking slots with operators continually being hit with heavy parking fines given by over zealous parking wardens when dropping passengers off outside London theatres, attractions and even at their hotels.

Tourist coaches account for 31% of coach movements in London, some 3,000 coaches a day and are important to the capital's tourism economy.

This led Transport for London (TfL) and the Confederation of Passenger Transport (CPT) to launch in October 2013, the 'Tourist Coach Action Plan', a 5 year study which sets out a list of achievable actions and goals designed to improve the experience for coach tour operators/drivers in London.

It focuses on a number of key areas including providing better access to tourist coaches; more flexible/smarter use of stopping and parking space using modern technology; improving the perception of coaches; and adopting a more

robust approach to discussing the challenges and opportunities for coaches in the capital.

Actions will be carried out and monitored by members of the London Tourist Coach Forum. This London-wide body brings together representatives of local and national government, the tourism and coach industries, as well as other interested parties, to discuss matters relating to tourist coach operations in London.

The London Eye is a good example of efficient tourist coach operations. Merlin Entertainment Group marshals eight coach bays at the attraction on behalf of the London Borough of Lambeth. The bays are free to use, although drivers must have a permit obtained from Merlin. In 2012 around 11,000 coaches served the London Eye and London Aquarium alone. At the busiest times there can be up to 120 vehicles per day picking up and setting down passengers. Congestion is minimal however, due to the effective way in which the facility is managed. This example highlights how a relatively small kerbside space can be used and disruption to the wider road network minimised.

This document has been developed by VisitEngland in partnership with Coach Tourism Council.

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FOR FURTHER INFORMATION

The Confederation of Passenger Transport UK (CPT) is the national trade association representing bus and coach operators and it runs the 'Coach Friendly' status scheme. The CPT provides advice on how to improve coach facilities through its network of regional managers.

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