

APPENDIX A

Coach Tourism in East Devon Task and Finish Forum

COACH TOURISM IN DEVON BRIEFING PAPER

(May 2024)

Background

This paper looks to provide an insight into the coach tourism as an industry, and specifically its development in Devon, in order to inform the work and decision-making process of the newly formed Coach Tourism in East Devon Task and Finish Forum at EDDC.

Key UK stats

- Coach tourism contributed £14 billion to the UK economy (2019)
- One coach can keep up to 50 cars off the road.
- In 2019 there were 23 million visits to tourist attractions and locations by coach
- The coach industry employs 42,000 people
- There are 2,500 coach operators in the UK
- 80% of the coach industry's income is from tourism-related work

Key facts about coach tourism and its importance

- Year-round operation, significant contributor to occupation during the shoulder season
- Very loyal customer base; consistency, predictability, ability to plan - bookings occur up to an year in advance
- Requires a 'full package' approach - a destination must tick all of the boxes for operators and group organisers in order to be attractive: from coach parking, accommodation and attractions to visit to food & drink and shopping experiences
- Itineraries are key
- Accessibility is very important, both in terms of ease of access for coaches and accessible facilities, incl. public toilets provision
- Economic enabler - very important to expanding the season/maintaining business during shoulder periods
- Resilience of the sector – predicted decline has not materialised; growing market nationally, but tends to stick to familiar destination, tried & tested approach
- Not high-end but good volumes
- Tends to cater for an older demographic, for many holiday makers this type of travel is now their holiday of choice. However, it's not just an OAP market - attracting younger profile of visitors via increasing share of school trips, university groups, professional associations, special interest groups, etc.
- Green credentials, lesser environmental impact, minimising traffic on roads: one single coach can take a minimum of 12 single cars off the road and that can easily rise to 24 cars for a full 48-seater coach.
- Inclusivity: coach travel enables people who cannot yet drive, for example school children and students and those who can no longer drive to enjoy cultural, educational and leisure experiences. Coach travel is an inclusive form of transport that brings customers to

destinations and towns which they may otherwise not visit or experience. Contributes to a more welcoming and inclusive visitor experience that benefits local residents, as well.

Main enablers for its development

- Road infrastructure and parking facilities
- Good signage and accessibility
- Established itineraries and content to sell
- Sufficient accommodation provision: 75 – 80 bedrooms min; 120 – 130 rooms optimum
- Ability to offer familiarisation visits for prospective group organisers and operators

Key stakeholders

- Coach travel operators
- DMOs
- Accommodation providers (major hotels)
- Tourist attractions
- Leisure facilities
- Local authorities (parking arrangements, meet & greet services, public realm maintenance)

Key players

Industry Bodies

- Coach Tourism Association <https://coachtourismassociation.co.uk>
- Visit England [Home | VisitEngland](#)
- Visit Britain [UK Tourism Industry Statistics & Research | VisitBritain.org](#)
- Confederation of Passenger Transport [CPT | CPT \(cpt-uk.org\)](#)
- Road Haulage Association [Coach Membership \(rha.uk.net\); https://www.rha.uk.net/Campaigns/Coaches](#)

Main coach tourism operators

- Shearings: <https://www.shearings.com/coach-holidays/uk>
- Just Go Holidays <https://www.justgoholidays.com>
- National Holidays <https://www.nationalholidays.com>
- Johnsons Coaches <https://www.johnsonskoaches.co.uk/holidays/>
- Alfa Travel <https://www.alfatravel.co.uk/>
- Caledonian Travel <https://www.caledonian.com/>

What incentivises coach tourism?

- Provision of sufficient coach parking and rest stops
- Drop off points conveniently located for coach passengers to access services
- Facilities for drivers, incentives, e.g. vouchers, food & drink provision
- Improved/well-maintained roadside facilities
- Clear guidance on traffic management affecting coaches
- Group travel offers and visitor information
- Established relationship with coach tour operators; welcoming environment

Key Devon coach tourism destinations

- Torquay
- Paignton

- Plymouth
- Exmouth
- Sidmouth
- Ilfracombe
- Lynton
- Dartmouth

East Devon's main coach travel destination geared to receive higher volume of group visitors by coach are Exmouth, Sidmouth and Seaton.

Main players in Devon

The Coach Tourism Association (CTA) has a number of active and engaged members in Devon, including Stuart Line Cruises, Devon's Top Attractions, Babbacombe Model Village, Brend Hotels, South Devon Railway, Destination Plymouth, Plymouth Boat Tours and Coldharbour Mill Museum. Devon is one of their strongest counties in terms of membership numbers among attractions, and they report strong appetite and market for coach groups in the region.

Destination Plymouth - Plymouth is home to some incredible group friendly attractions, catering for different interests – from the UK's largest aquarium to historical boat trips around Plymouth, museums like The Box and experiences like tours of the Plymouth Gin Distillery. Breadth and richness of the offer and experiences is key. Well-developed itineraries for group visits.

Devon's Top Attractions (DATA) - Devon's Top Attractions represents high-quality visitor attractions in Devon. Annually inspected to meet quality standards, ensuring visitors enjoy a quality day out on every level. They offer a whole host of interesting and varied days out. Members range from castles, botanical gardens, museums to theme parks, zoos, steam railways, narrow gauge trams and boat cruises.

A one stop information shop and a group trip itinerary planning service is available, plus attractive prices and joint ticketing options.

Visit South Devon – VSD has been active in this market for a few years now and has created a new area on their website dedicated to Group Travel [Group Travel and Coach Parties to South Devon \(visitsouthdevon.co.uk\)](https://visitsouthdevon.co.uk). It has developed a group travel plan to help increase awareness of the towns in South Devon as a group/coach friendly destination for the travel trade and tour operators. It provides bespoke itineraries for the towns who have bought into their Group Travel Campaign last year. They are about to launch the same campaign for this year in the coming month. They are planning to create thematic itineraries linking up the towns across all of South Devon (which also covers East Devon), e.g. Heritage, Cultural, Food and Drink, Sustainability, etc.

They have exhibited at the British Tourism & Travel Show (BTTS) this year and the past 3 years with Devon's Top Attractions (DATA). They also have developed an extensive new database of Group Travel, Coach companies and Tour ops which we have built over the past 3 years.

Visit Exmouth – There is significant activity supporting coach tourism, and an engaged Town Council providing meet & greet service to coach operators. Resources have been developed over the years including coach drivers directory, enclosed coach driver's flyer produced by ETC and the Council has previously provided vouchers for coach drivers in partnership with local cafes.

The town is well geared towards coach tourism, offering 'the full package' of facilities and opportunities and has some of the most active players, like Stuart Line Cruises and World of Country Life.

Visit Exeter - Exeter is a well-established coach tourism destination focusing on shopping, heritage and culture. It's a market Visit Exeter has focused on in the past, benefitting from a lot of day visitors from nearby destinations with overnight coach trips, such as Torquay and Exmouth.

Visit Exeter used to provide a helpful and informative one-stop booking service, including organising guided tours with Exeter's Red Coat Guides: booking attractions visits; suggesting tailor-made group itineraries; accommodation advice and help with coach parking.

It used to run campaigns to promote Exeter as a destination for groups, e.g. press releases, advertising and editorial in the group travel publications, attending exhibitions aimed at that market such as Excursions, the Group Leisure & Travel Show and BTTS (British Tourism & Travel Show), and producing group itineraries and a group travel guide. They have also worked with local cafes to offer incentives to coach drivers, e.g. free drink/cake in a local café while they wait.

Last year they had major cuts to the tourism department, so this is no longer a market they're able to focus on, due to lack of budget and resource. They still have a section on their website with info and itineraries etc.: [Group Visits in Exeter \(visitexeter.com\)](http://www.visitexeter.com), and send out e-newsletters to a database of group travel organisers occasionally, but we no longer do any paid advertising or offer incentives.

North Devon: While North Devon is still an important coach tourism destination in Devon (Ilfracombe being the main destination), currently no organisation has a leading role in coach travel arrangements locally. The district council does not engage directly in activities supporting the sector. There have been issues with loss of hotel provision, decrease of this type of holidays as they are not specifically nurtured or incentivised. The area is aiming at a more affluent/higher spend market; There are coach drop off points in existence, but provision has not been increased and there have been turning circle issues in Ilfracombe.

Enclosed:

Coach driver's flyer Exmouth Town Council produced in 2016:



00256 ETC Coach
Drivers Flyer FVIS Fir

Devon Guide for Groups by Beau Media: [Bespoke Guide to Devon for Groups by Beau Media - Issuu](#)

Photo of Exmouth's coach park, taken on 15th May 2024 showing some of the 12 coaches parked on the day:

