

A photograph taken from the passenger perspective inside a modern coach bus. The bus is traveling on a multi-lane highway with green trees and a clear sky visible through the large front and side windows. The interior features blue and grey patterned seats with integrated reading lights. A driver in a white shirt and dark vest is seen from behind at the steering wheel. A passenger in the foreground is holding a yellow cup. A small digital display is mounted on the ceiling. The RHA logo is overlaid in the top left corner.

RHA

COACHING AHEAD

A manifesto for the coach industry

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FOREWORD

The coach industry is one of the UK's great transport success stories. Every day, coaches connect communities, take children safely to school, bring visitors to our towns and cities, and provide an affordable and accessible travel option for millions of passengers. They do so while offering one of the lowest-carbon forms of motorised passenger transport.

However, the sector has faced an exceptionally challenging decade. Operators have navigated Brexit, the pandemic, rising operating costs, driver shortages and increasing regulatory pressures, all while continuing to deliver essential services and invest in cleaner vehicles and new technology.

This document sets out the Road Haulage Association's priorities for ensuring the coach sector can thrive in the years ahead. We need a clear pathway to attract the next generation of drivers and technicians, proper recognition of coaches as a distinct transport mode, investment in infrastructure, a realistic roadmap to net zero, practical accessibility measures that work in the real world, and simpler arrangements for international travel.

Coaches are not a niche part of the transport system; they are a vital contributor to economic growth, tourism, social mobility and the transition to a lower-carbon future. With the right support from Government, the industry can do even more.

The RHA stands ready to work with ministers, officials and partners across the transport network to deliver a stronger, more sustainable and more competitive coach industry for the whole of the UK.



Richard Smith
Managing Director, RHA
August 2026

SUMMARY OVERVIEW

The UK coach industry in 2026 plays a vital role in providing flexible and sustainable transport for millions of passengers each year. Coaches connect communities that may have limited public transport options, providing key services such as home to school transport.

Coaches carry millions of visitors to destinations and attractions in the UK, with research suggesting that just one additional coach arriving at a destination every day can generate around £1 million of economic value each year for the local economy¹. In a world where the transport sector is expected to decarbonise, it does this by offering one of the lowest-emission forms of motorised passenger transport per passenger kilometre.

However, the coach sector has endured multiple economic challenges over the past 10 years, ranging from Brexit, Covid-19 and the Ukraine and Iran crises, while adapting to changing travel patterns, rising fuel costs and driver shortages. Operators face significant hurdles around infrastructure, the transition to net zero, accessibility requirements and the commercial viability of some services. As a predominantly commercial industry with limited public subsidy, the coach sector requires a regulatory framework that recognises its needs, separate from those of buses. It is one which needs investment and growth, and in return can provide safe, low-carbon and accessible services for passengers.

¹ <https://www.cpt-uk.org/media/zbvptkz1/241001-economic-impact-of-coach-services-final.pdf>, Pg 18.

FACTS AND FIGURES

THE COACH INDUSTRY IN 2026

450 MILLION

PASSENGER JOURNEYS
made by coach in Britain every year²

81,000

INDUSTRY JOBS
ACROSS BRITAIN³

£8.3 BILLION SPENT ANNUALLY

by coach passengers in local economies through tourism, shopping and leisure⁴

Research suggests that just one additional coach arriving at a destination every day can generate

£1 MILLION

ANNUALLY TO THE
LOCAL ECONOMY⁶

International visitors travelling by coach contribute an additional

£610 MILLION

in spending each year to the UK economy⁵

1 MILE OF CARS

could be removed from our road network by one single coach⁷

Area	Our Ask to Government
Skills	A clear pathway from education into a career in coaches that encourages recruitment from age 18 while removing unnecessary restrictions on younger drivers.
Planning	Plan for coaches properly and recognising coach as a distinct transport mode, operating in a de-regulated market separate from the increasingly regulated bus sector.
Net Zero	A long-term zero-emission coach roadmap to 2050.
Accessibility	Promote inclusivity through measures that genuinely increase access to coach travel, focusing on all elements of the journey, not just the vehicle.
International	Simplify journeys into Europe by removing red tape at the border.

2 <https://www.cpt-uk.org/media/c5zegpxg/coach-facts.pdf>, Pg 2
3 Ibid, pg 3
4 Ibid, pg.3
5 <https://www.cpt-uk.org/news/economic-impacts-of-coach-services-report/>
6 Ibid, pg 3
7 <https://www.cpt-uk.org/blogs/coach-travel-is-a-crucial-part-of-the-journey-to-net-zero/>

1. SKILLS AND WORKFORCE DEVELOPMENT

■ The problem

The coach and bus industry has an estimated shortage of 5,000-10,000 drivers. As older drivers retire and others leave the industry, recruitment is not keeping up, with 24% of drivers in the industry thought to be over the age of 60. The RHA is concerned that shortage will only grow.

Coach operators have a clear disadvantage to bus operators in attracting drivers under the age of 21. Due to the regulations restricting young coach drivers' journeys, it makes it difficult for coach operators to take on a young driver.

Despite high levels of recruitment and investment in training and apprenticeships, staff shortages remain persistent across the industry with almost 14% of driver roles currently vacant. Shortages of drivers and technicians are already a huge barrier for operators and are holding the industry back from further growth.

■ Our ask

We need a clear pathway from education into a career in coaches that encourages recruitment from age 18 while removing unnecessary restrictions on younger drivers.

■ Recommendations to Government:

- Create entry level funded courses for Category D licence acquisition and technical courses such as heavy vehicle tyre fitting.
- Remove the current restrictions on 18-year-old drivers to allow them to undertake non-scheduled or occasional journeys, making coach driving a career choice for school and college leavers.
- Urgently review the driver apprenticeship scheme, as it applies to both bus and coach drivers.
- Promote coach careers within schools and colleges, highlighting the apprenticeships available for technicians, driving and transport managers.
- Create a separate Standard Occupational Classification (SOC) code for coach drivers to improve data analysis.



2. PLANNING FOR COACHES

The problem

Coaches have a distinct operating model yet continue to be regulated as though they are local bus services, resulting in bad policy-making that fails to meet the needs of the coach sector. Moreover, many towns and cities omit coaches from their transport plans, failing to realise the vital role they play as a sustainable transport option. This lack of planning means that a shortage of coach parking and adequate rest stops make it difficult for drivers to comply with the strict time regulations they must follow to keep their passengers and other road users safe.

Our ask

Government should plan for coaches properly. Such planning should recognise coaches as a distinct transport mode, operating in a de-regulated market separate from the increasingly regulated bus sector. In addition, local authorities must factor coaches into their local transport and spatial plans. Only then, can coach businesses and drivers be supported by a regulatory framework that supports the industry, and infrastructure which supports its drivers.

Recommendations to Government:

- Ensure that future legislation and regulations distinguish between bus and coach as transport modes.
- Promote transport planning guidance which focuses on the role of coach as a sustainable travel option.
- Invest in our road infrastructure including facilities, rest stops and charging infrastructure.
- Mandate that Motorway Service Areas provide more parking for all modes, with a greater priority on coaches, giving priority service to drivers, and having parking areas more conveniently located for coach passengers to access services.
- Encourage local authorities to work with major tourist attractions, hotels and leisure facilities to ensure they provide sufficient coach parking.
- Introduce a more consistent approach to procurement across local authorities, with standard tender documents, shared procurement platforms and aligned DBS processes, to save both councils and operators time and money.



3. DECARBONISATION AND NET ZERO

The problem

As with HGVs and buses, the RHA recognises that coaches will transition to zero-emission vehicles over time. However, there is currently no roadmap, insufficient charging infrastructure and limited financial support from government to help the transition. According to the RHA's Future of Fleets report, 75% of coach operators currently have no plans whatsoever to introduce zero emission vehicles into their fleet, with cost and insufficient mileage range on available zero emission coaches being highlighted as significant barriers.

Our ask

We need a long-term zero-emission coach roadmap to 2050. The sector needs investment in charging and hydrogen infrastructure, increased availability of low-carbon fuels, and financial incentives that will encourage operators as they transition to cleaner technologies.

Recommendations to Government:

- Work with industry and the market to develop a zero-emission coach travel roadmap up to 2050.
- Invest in green refuelling and recharging infrastructure suitable for coaches across the UK motorway and A-road network.
- Apply learnings from the Zero Emission and Hydrogen Infrastructure Demonstrator (ZEHID) trial to coaches and ensure parity of funding support with HGVs.
- Provide an interim fuel duty incentive for low carbon fuels so that coach operators can run the cleanest fleet possible.
- Publish the Low Carbon Fuels Strategy as soon as possible to give industry the confidence it needs to invest in alternative fuels.



4. ACCESSIBILITY

I The problem

Under the current Public Service Vehicle Accessibility Regulations (PSVAR), all vehicles used on journeys in scope of the regulations must be 100% accessible. In the case of coaches, this relies on wheelchair access systems that require supporting infrastructure – including flat areas of up to 4 metres adjacent to the kerbside – which do not exist in many locations where coaches operate. This results in vehicles that are technically accessible but unable to provide customers with reliably accessible journeys. At the same time, the substantial additional weight and space required to carry accessibility equipment reduces vehicle capacity and operational efficiency, creating a regulatory outcome that does not always improve passenger access in practice.

I Our ask

Government should promote inclusivity through measures that meaningfully increase access to coach travel, with an approach that focuses on all elements of the journey, not just the vehicle, which is only one part of it.

I Recommendations to Government:

- Reform PSVAR so that accessibility requirements focus on delivering accessible journeys in practice, not solely on whether a vehicle is fitted with accessibility equipment.
- Develop a whole-journey accessibility framework for coach travel, covering every stage from booking to arrival, supported by appropriate infrastructure such as level boarding areas, kerbside space and safe boarding locations.
- Provide clear guidance on the respective safety and accessibility requirements for buses and coaches, recognising their different operating models.
- Work with local authorities, operators and disability groups to identify priority locations where investment in accessible coach infrastructure would have the greatest impact for passengers.



5. INTERNATIONAL COMPETITIVENESS AND BORDER OPERATIONS

The problem

With the introduction of the EU Entry Exit System as well as the European Travel Information and Authorisation System, there is concern over the impact and disruption these systems are having on coach movements crossing borders. More stringent passport checks, together with a lack of capacity and infrastructure to accommodate these changes, are also damaging international coach travel.

Our ask

We need government to work with international partners to simplify checks at the border and cut red tape.

Specific asks:

- Government should work with the EU to introduce pre-registration and online documentation to speed up border crossings, ensuring that coach travel remains a viable option for international journeys.
- Implementation of a Professional Drivers' Exemption to exempt coach drivers from the 90/180 day rules.
- Invest in our road infrastructure including improved port and border facilities.

What can be done in the next 12 months

- Publish the Low Carbon Fuels Strategy to provide certainty for investment.
- Extend the Skills Bootcamp programme to include Category D licence acquisition alongside technical skills such as tyre fitting.
- Urgently review the driver apprenticeship scheme for bus and coach drivers.
- Remove the restrictions on 18-19 year old PSV drivers to open up a career pathway to the coach sector direct from education.
- Ensure future legislation and regulations distinguish between buses and coaches as separate transport modes.
- Reform PSVAR so that accessibility requirements focus on delivering accessible journeys in practice, not solely on whether a vehicle is fitted with accessibility equipment.
- Introduce a more consistent procurement approach across local authorities, including standard tender documents, shared procurement platforms and aligned DBS processes.
- Begin work with the EU on pre-registration and online documentation to speed up coach border crossings.
- Begin work to implement a Professional Drivers' Exemption from the 90/180-day rule for coach drivers.
- Introduce an interim fuel duty incentive for low-carbon fuels.

What can be done in the next 1-3 years

- Promote transport planning guidance recognising coaches as a sustainable transport mode.
- Invest in our road infrastructure including facilities, rest stops and charging infrastructure.
- Improve port and border infrastructure to support coach operations.
- Mandate that Motorway Service Areas prioritise coaches through improved parking, driver facilities and passenger access.
- Encourage local authorities to work with tourist attractions, hotels and leisure facilities to provide adequate coach parking.
- Apply learnings from the Zero Emission and Hydrogen Infrastructure Demonstrator (ZEHID) to coaches and ensure parity of funding support with HGVs.
- Develop a whole-journey accessibility framework for coach travel, covering every stage from booking to arrival, supported by appropriate infrastructure such as level boarding areas, kerbside space and safe boarding locations.
- Provide clear guidance on the respective safety and accessibility requirements for buses and coaches, recognising their different operating models.
- Work with local authorities, operators and disability groups to identify priority locations where investment in accessible coach infrastructure would have the greatest impact for passengers.

What can be achieved in the long term

- Invest in green refuelling and recharging infrastructure suitable for coaches across the UK motorway and A-road network.
- Work with industry to develop and deliver a zero-emission coach travel roadmap through to 2050.

ABOUT THE RHA

■ The RHA is the largest dedicated trade association representing over 8,500 HGV, coach, and van operators across the UK.

Our members are operators of vehicles who, between them, operate around 250,000 HGVs (half of the UK fleet) out of 10,000 operating centres and range from a single truck company to those with thousands of vehicles.

The UK road haulage sector is responsible for 81% of all freight movements and is directly involved in the transportation of 98% of all agricultural products.

www.rha.uk.net

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