

A photograph taken from the interior of a coach bus, looking out the front windshield. The view shows a multi-lane highway stretching into the distance under a bright, hazy sunset sky. The sun is low on the horizon, creating a strong orange glow. In the foreground, the backs of several rows of blue upholstered seats are visible. Above the windshield, a small rectangular screen displays a red car, and a digital clock shows '19:23'. The dashboard and steering wheel area are partially visible in the lower center of the frame.

RHA

Coaches

A Clear Route to Growth

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INTRODUCTION

A huge range of activities, industries and economic sectors depend on coach travel – sports, domestic tourism, school transport, cultural events such as gigs and festivals, and rail replacement.

The coach sector provides employment for tens of thousands of people, and accounts for £17.2bn of economic value each year.¹

However, despite the immense value of its service, a lack of government support, labour shortages, and difficult macroeconomic conditions have meant, despite an impressive recovery from the pandemic, we have missed and are missing considerable opportunities to grow the coach industry and serve the public better.

There is considerable scope, however, not just for recovery, but for robust growth: there remains a strong appetite for domestic tourism, high consumer demand for ecologically sustainable transport, and a growing recognition of its reliability and value-for-money, particularly compared to passenger rail transport. As we accelerate the transition to net zero, the coach industry must be supported to step up and decarbonise as it grows its share of journeys. In their current diesel powered form coaches are already the greenest form of transport per passenger mile, this lead will further extend from the Zero Emission Vehicle mandate adoption.

Yet without the right incentives, support, and policy framework, the coach industry will struggle to thrive as it ought to.

Therefore, the RHA has compiled a set of policy recommendations to support the sector, including amendments to licencing regulations, the harmonisation of Clean Air Zones within a national framework, infrastructural improvements to support the green transition, administrative changes including a separate regulatory structure for coaches, support for driver and mechanic training, and reductions in costly red tape at the border.



CONTRIBUTION OF THE SECTOR

Coaches play a unique role in the UK’s transport ecosystem. They are the only mode of transport which can carry large numbers of people from point to point without significant additional investment in infrastructure.

As the only truly flexible form of mass transit, coach services are essential for individuals and communities across the country.

Coaches take tour groups to attractions nationwide, football fans to away games, gig-goers to arenas and stadiums. Literary and performing arts festivals rely on them. Coaches also support national security, playing their part by facilitating the efficient movement of military personnel and ensuring operational readiness.

600,000 pupils are taken to and from school every day by coach, and many schools and colleges would be unable to run school trips without them.

Coaches transport vulnerable and disabled people, making domestic and international tourism accessible for those who cannot travel by air or rail. When the trains fail, coaches step in to plug the gap.

Market Overview

This section examines the UK tourism market with specific attention to the facilitatory role played by coach travel, looking at economic trends from before and during the pandemic, through to the current state and future of UK tourism based on consumer patterns.

The State of the Market Pre-Covid-19 Pandemic

In 2019, around 500 million passenger journeys were made by coach, transported by a sector comprising around 2,500 coach operators (81% of which are individually- or family-owned), and employing around 42,000 people. ²

The UK’s coach industry today comprises roughly 3,000 operators, supporting around 42,000 jobs and generating £14 billion for the national economy. Of that, coach tourism alone accounts for over £6 billion. ³

⁴Demand was stable, with the industry primarily serving domestic tourism and school transport. 23 million passenger journeys were made to tourist hotspots, contributing £14 billion to the UK economy, according to analysis of the Government’s Transport Survey Data.

The Impact of the Covid-19 Pandemic on the Sector

The Covid-19 pandemic severely damaged the coach transport industry. Almost every use-case was suspended or outlawed. School-age pupils took their lessons at home; festivals, gigs, and sports matches were cancelled or played in empty stadia; domestic and international tourism ground to a halt as non-essential travel was at different times prohibited or discouraged.

The ONS reports that overseas residents made 6.4 million visits to the UK in 2021 – 43% less than in 2020⁵. UK residents also made fewer journeys, with only 19.1 million visits abroad in 2021, which was 20% less than the previous year.⁶

2 National Operator Coaches Database – Traveline: <https://www.travelinedata.org.uk/traveline-open-data/transport-operations/about-2/>
3 National Travel Survey, 2020, Department for Transport: <https://tinyurl.com/6azmexad>
4 Coaches, Road Haulage Association: <https://bit.ly/4jrFPHX>
5 ONS Travel Trends, 2021: <https://tinyurl.com/2d8bxbhd>
6 Ibid.

By 2021, according to figures from the Department for Transport, 80% of coach operators had seen their turnover more than halve. 20% saw turnover fall by over 90%.⁷

A survey by Instabus revealed that 62% of coach travel operators that were unable to continue their business cited insufficient financial support to cover their bills, highlighting this as a key reason for their closures. 78% of operators that were able to reopen post-lockdown also cited struggling with inadequate financial support or bill payments during the pandemic.⁸

Sector Recovery in 2024/2025

Four years on, the coach sector has still not returned to its pre-Covid health, with 450m journeys taken by coach last year ⁹, 50m fewer than in 2019.

Despite a comparative lack of targeted support, the coach industry has made impressive strides towards recovery, directly employing 42,000 people with these jobs contributing £6.4bn to the economy. ¹⁰

Nonetheless, key barriers remain including post-Brexit red tape at the border, which has damaged the appeal of coaches as a low-cost method of international mass transport; the ongoing cost-of-living crisis, which has reduced disposable income for domestic tourism ¹¹; and inflationary pressures and tax increases which have reduced the profit margins for operators large and small.

While the cost-of-living crisis has in some ways created opportunities for the coach industry, with some passengers opting for more affordable coach travel over expensive train services ¹², coaches have also suffered from a downturn in domestic tourism, with many consumers prioritising low-cost overseas holidays with their more limited disposable income.¹³



7 Member Survey, 2020, Department for Transport (Analysis by CPT): <https://tinyurl.com/4r6pspes>
8 Survey – State of the Coach Travel Industry Post-Lockdown, Instabus, 2021: <https://tinyurl.com/msrt54am>
9 The Economic Impact of Coach Services, KPMG, 2024: <http://bit.ly/3R36ezc>
10 Securing the future of the coach industry, Road Haulage Association, 2023: <https://bit.ly/4k9okw3>
11 Inbound Tourism Forecast, Visit Britain, 2025: <https://tinyurl.com/3v9re9vz>
12 Coach & Bus Transport in the UK - Market Research Report (2015-2030), IBIS World, 2025: <https://tinyurl.com/3saysk4r>
13 Securing the future of the coach industry, Road Haulage Association, 2023: <https://bit.ly/4k9okw3>



Case Study: Blackpool

In 2024, approximately 90 coaches were estimated to enter Blackpool each day, transporting roughly 4,500 visitors who collectively spend about £200,000 daily in the local economy.¹⁴

In 2022, Blackpool attracted 1.5 million visitors to an already record-breaking year in 2021 – comprising 30% of all visits to the county in 2022.¹⁵ The success of 2022 was supported by the return of large-scale events such as the Air Show Weekend, a two-month extension of the autumn Illuminations season and an expansion of the very popular Christmas By The Sea village.¹⁶

Tourism is an important pillar of the local Blackpool economy for providing job opportunities, with a 20.9% unemployment rate among its working age population. Visitors come from across the UK with the highest numbers of visitors originating from Scotland, followed by the West Midlands and Yorkshire and Humber.



14 Blackpool reaps economic benefits from Coach Tourism, new research reveals, Exotic Places to Travel, 2024: <https://tinyurl.com/4xyu3bne>
15 The Economic Impact of Coach Services, KPMG, 2024: <http://bit.ly/3R36ezc>
16 Ibid.

Future of the Market: Key Trends

Despite uncertain economic headwinds, with the right support and policy environment, the coach sector is poised to thrive. Visit Britain predicts that inbound visits to Britain will increase by 5% this year¹⁷ – some of whom will engage in intercity or tourist hotspot travel that relies on coaches. RSM's Consumer Outlook Survey reports that 28% of UK consumers are planning long-stay UK holidays in 2025 and 33% are planning a weekend trip within the UK.¹⁸

Growth in the Sector

Between July and September 2024, the UK saw a 36.1% increase in new bus, coach, and minibus registrations, marking six consecutive quarters of growth.¹⁹ This surge reflects a recovery in passenger levels and increased demand for coach services.

Shift to Net Zero and Sustainable Travel

Consumers are increasingly concerned about sustainable travel and reducing their carbon footprint. Booking.com's annual Sustainable Travel Report 2024 reveals that for 83% of travellers, sustainable travel is important to them, and 75% expressed their want to travel more sustainably over the next 12 months.²⁰

Coaches are already one of the greenest forms of mass transit, with emissions around 1.5x lower even than of rail,²¹ yet coach operators are working hard to reflect consumer demand and reduce emissions further. According to the Department for Transport's (DfT) statistics, coaches are among the greenest forms of inter-city travel – a journey from Manchester to Cardiff emits approximately 10 kg CO₂ equivalent per passenger by coach, compared to 42 kg by petrol car and 12 kg by train.²²

In the first nine months of 2024, zero-emission bus, coach and minibus registrations accounted for 20.9% of all new registrations,²³ with further investment taking place in more fuel-efficient, and aerodynamic vehicles, powered by electricity or lower-carbon fuels.²⁴

It's important to note, however, that the vast majority of these registrations were for buses and minibuses. Accurately estimating the true number of coaches remains challenging, as they are frequently grouped together with buses in official statistics.

Consumer Demand

The UK's coach sector has shown resilience since the pandemic, with demand almost back to pre-pandemic levels and strong sales across the sector.²⁵ One of the key shifts has been the increased demand for affordable travel options.²⁶ Coaches are generally more affordable than trains and planes, especially for long-distance travel. Amid higher costs of living for many, consumers are increasingly seeking budget-friendly alternatives, and coaches offer competitive pricing without sacrificing comfort as operators modernise and provide passengers with amenities like a guaranteed seat, Wi-Fi, reclining seats and power outlets.

Coaches have become a dependable option, particularly in light of rail disruptions and strikes. In 2024, National Express recorded approximately 1.3 million new customers travelling on its services since rail strikes began in June 2022, reporting that 15% of rail users transitioned to National Express for better value and more reliable service.²⁷

17 Inbound Tourism Forecast, Visit Britain, 2025: <https://tinyurl.com/3v9re9vz>
18 Hotels, travel and tourism industry outlook, 2025, RSM: <https://tinyurl.com/24p7avma>
19 UK bus market witnesses 36.1% growth in Q3 2024, Motor Finance Online, 2024: <https://tinyurl.com/44bmmx97>
20 Sustainable Travel 2024, Booking.com, 2024: Available at: <https://tinyurl.com/pz2tafj7>
21 Why coaches are the unsung sustainability superheroes of our roads, The Independent, 2022: <https://tinyurl.com/2p8shyz>
22 Transport and environment statistics: 2023 (2021 data), Department for Transport, 2023: <https://bit.ly/3EGXoV7>
23 Registrations to operate zero emission buses increase, Green Fleet, 2024: <https://tinyurl.com/3772u4y5>
24 Sustainable Coach Travel in 2024: How the Industry is Shaping Up, Jones Executive, 2024: <https://tinyurl.com/5ammfys5>
25 Coach tourism sector reports strong business upturn, Coach Tourism UK, 2024: <https://tinyurl.com/yrrnpuzz9>
26 Coach & Bus Transport in the UK - Market Research Report (2015-2030), IBIS World, 2025: <https://tinyurl.com/3saysk4r>
27 National Express boosts capacity during rail strikes, Bus and Coach Buyer, 2024: <https://tinyurl.com/8xbr8cp7>



Case Study: Wembley Stadium

Coach travel, particularly to football finals, is a popular way of travelling economically to Wembley Stadium in North London.

Given the stadium's capacity of 90,000, the efficient transportation of both teams participating in games at Wembley and fans is crucial. Coaches offer a sustainable and organised means of moving large groups to Wembley, reducing traffic congestion and environmental impact compared to individual car travel. The dedicated coach parking facilities at Wembley are integral to managing the high volume of attendees during major events.

Coaches also offer a more economical way to travel for many football fans. In 2017 for the Championship Play Off Final, Supporters Trust at Reading ran a fleet of coaches from Reading's stadium to Wembley for £10, less than a quarter of the price of a return train journey from Reading Train Station.

The 2021 FA Cup Final between Leicester City and Chelsea took place in front of the largest crowd since the Coronavirus pandemic. Of the 21,000 fans in attendance, more than 150 coaches made the journey from Leicester transporting up to 8,000 fans on the day.



Economic Impact

The economic value of the coach industry cannot be overstated. As well as providing thousands of jobs – including in areas which face higher levels of economic deprivation – a wide range of economic activity depends on the coach industry.

Economic contribution

Jobs, taxes, wages and investment

The coach industry directly employs 42,000 people in the UK, with a further 27,000 indirectly employed by supporting industries and services.²⁸ The total value to the economy of employment alone amounts to £6.4 billion – through taxes, wages and investment into supply chain.²⁹

Economic and social activities of coach passengers

The coach sector contributes £2.5 billion through increased connectivity and affordability and reduced impact on other road users.³⁰

Economic impact of coach passengers interacting with local economies

£8.3 billion through shopping and leisure spend, tourist activity on day and overnight trips, and inbound international tourists spend. £3.5 billion is from day trips and around £2.3 billion is via passenger outlay on leisure and shopping. Domestic coach users who stay overnight at their destination contribute £1.9 billion, while international tourists spend over £600 million.³¹

Economic impact of the supply chain

The economic impact of direct employment and supply chain spending is significant, but there are also indirect effects via the supply chain's expenditure on the inputs needed to produce the necessary goods and services. This impact is estimated to amount to £1.3 billion annually across the UK.³²

This means that the overall economic contribution of the coach sector can be calculated at £17.2bn³³, according to KPMG.



²⁸ The Economic Impact of Coach Services, KPMG, 2024: <http://bit.ly/3R36ezc>

²⁹ Ibid.

³⁰ Ibid.

³¹ Ibid.

³² Ibid.

³³ Ibid.



Case Study: Alton Towers

Alton Towers is the UK's number one theme park that is visited by approximately 2.3 million visitors a year. It is one of the largest private sector employers in the area, directly and indirectly supporting 2,900 local jobs and 3,520 jobs across the West Midlands region. While many of these positions are seasonal or part-time, the theme park employs approximately 900 full-time staff.

Alton Towers generates nearly £38 million of income annually and over £73 million in the regional economy, providing business for local suppliers and businesses.

Without driving or using a coach, travelling to Alton Towers requires taking a train to Uttoxeter or Stoke-on-Trent, followed by a bus or taxi. The drive from Uttoxeter to Alton Towers is over 9 miles and from Stoke-on-Trent, over 15 miles. This is not only costly, but also involves various changes and a choppy journey experience.

Various holiday and travel providers offer packages that include coach travel to Alton Towers, such as Loch Lomond Travel and The Coach Company. Additionally, visitors can book directly through Flixbus, Megabus and National Express.



INDUSTRY CHALLENGES

This report has so far shown the important role of the coach industry in driving several sections of the economy, as well as its status as a large employer and industry in its own right. However, there are several threats facing the industry and its role in cultivating growth elsewhere in the economy. Steps need to be taken at multiple levels of government, in regulators and licensing authorities, and indeed within the industry itself to ensure the protection of coaches and the businesses that rely on them.

Rising Costs and Regulation

The coach industry has experienced disproportionate effects from inflation of the past few years. Cost pressures including the prices of fuel, replacement parts, maintenance, and insurance have now increased to a point which is hampering certain operators and restricting the growth and sustainability of the industry.

With their competitive prices, coaches are often the only transport option for low-income families and individuals who want to travel. For these travellers in particular, rising costs being passed on to ticket prices will stop them from being able to travel, removing people's ability to tour the UK and beyond.

On popular tourist routes where operators are more likely to be able to pass on these costs, the areas and industries which rely on coach travel will suffer. Decreased footfall and decreased disposable income for those who do visit will take money from local economies and inhibit local and national growth.

In addition to higher costs, the coach industry faces significant regulation in contrast to other public transport sectors.

Rightfully, the sector is heavily regulated; integral to any service is its safety to consumers, not least when that service involves heavy vehicles, high speeds, and densely populated urban areas. Regular maintenance and safety checks on vehicles are required by law to make sure all coaches are kept in a condition which eliminates risks to passengers.

However, when considering other modes of transport – primarily buses – there are discrepancies between regulation of the two. Buses that offer school routes are not required to be fitted with seatbelts and those without seatbelts are extremely difficult to retrofit. By contrast, coaches are subject to more rigorous safety measures including seatbelts, high back seats, and structural integrity measures. With lower safety standards and an abundant supply of later life vehicles, this means that buses increasingly have a competitive advantage over coaches – a disparity which must be addressed.

The minimum age for drivers is another area which requires a review. Allowing 18-year-old drivers to do more coach work would widen the pool of drivers. To ensure standards and overcome any concerns over safety and the responsibility of younger drivers, such a reduction could be conditional on having followed a recognised entry training scheme, and candidates could be subject to a requirement for continued development and monitoring until they reach the age of 20.

We are calling on the Government to introduce a number of recommendations to support the industry:

RECOMMENDATION: Government should introduce an essential user rebate for coach firms to reduce inflationary pressures and rising cost pressures

RECOMMENDATION: Government should provide clarity on safety measures required of buses versus coaches to ensure that the former does not benefit from an unfair competitive advantage

RECOMMENDATION: Government and licensing authorities should introduce lower age limits for drivers, accompanied by adequate safety and insurance support



Case Study: Llandudno

Llandudno is a popular destination for tourism in the UK, attracting visitors with its distinctive Victorian charm, coastal appeal, and striking scenery. A significant number of tourists choose to arrive by coach, visiting attractions such as the Great Orme, Llandudno Pier, and Venue Cymru.

Llandudno's accessibility and attractions make it a prime destination for coach tours, particularly among older demographics and organised groups. Operators like Shearings and Caledonian Travel offer packages that include guided tours of the Great Orme, visits to the Victorian Pier, and excursions to nearby sites such as Conwy Castle.

In 2018, the tourism industry in Conwy County, encompassing Llandudno, was valued at £904 million, with the area drawing approximately 9.39 million visitors annually.³⁴

The total economic impact of tourism in Llandudno was £384 million in 2017, according to County Conwy Borough Council.³⁵ Of this figure £289 million derived from direct expenditure whilst £95 million was indirect. Staying visitors provided the most economic benefit with £249 million whilst day visits added £135 million to the local economy.



The Transition to Net Zero

Against the aforementioned financial constraints being experienced by the coach industry, there is a significant need to modernise the UK's coach fleet. Many operators are enthusiastic about providing the next generation of coaches, compliant with net zero targets and with accessibility improvements which will be transformational for some travellers.

The reality of the current fleet, however, is some way off these ambitions. The industry simply does not have the financial means to renew and update existing fleets at the speed we would like. Increases in costs have directly taken investment capacity from many operators.

Many of these upgrades, particularly when it comes to net zero, are likely to be legally required to set timelines, threatening companies which are unable to find large injections of cash in order to comply.

In many of the metropolitan areas of the UK, councils have implemented low emission zones. These incentivise green travel by attaching a cost to bring high-emission vehicles into these zones. Positive effects to air quality as a result of these schemes have been proven on multiple occasions. It is important that these schemes recognise that coach travel is the greenest form of transport and that exemptions to these emission and ultra-low emission zones are maintained. Some schemes, like the London ULEZ, does this by exempting coaches. However, many low emission zone schemes unfairly discriminate against coaches, treating carbon emissions per vehicle as an absolute value rather than taking into account the carbon emissions per passenger.

While the industry is working to decarbonise fleets and better its sustainability credentials, the market for low emission coaches is still too immature to support current policy intentions, and retrofitting is not cost-effective for operators.

To this end, we are calling on the Government to take a number of actions.

RECOMMENDATION: Government should develop a zero-emission coach travel roadmap in conjunction with the industry up to 2050 – sparing coach operators the burden of complying with varying Low-Emission and Clean Air Zones

RECOMMENDATION: Government should invest in the necessary infrastructure to support the sector's transition to net zero, including the development of electric and hydrogen coaches

RECOMMENDATION: Government should look to lower the cost and increase the availability of low-carbon alternative fuels

RECOMMENDATION: Government and the industry should work directly with industry partners, planners, developers and local authorities to invest in the road infrastructure required to support the net zero transition

³⁴ Tourism Economic Benefit Exceeds £900m in Conwy County, Business News Wales, 2019: <http://bit.ly/3GkYNBp>
³⁵ BP 23: Llandudno Tourism Study, Conwy County Borough Council, 2020: <https://tinyurl.com/2p8y3y5e>

Competition with Other Forms of Travel

Diversity in travel options is a public good. Travellers should be able to choose from a range of services, whether bus, coach, train, plane or car. Healthy competition between these forms of travel will help keep prices and wages fair while allowing the healthy coexistence of these different transportation methods.

However, challenges can arise in this regard. Primarily, policymakers often conflate the needs of coaches with buses when they operate completely differently in practice.

As things sit, other forms of travel involve practices which give them an unfair advantage over coach travel, to the detriment of everyone. Ride sharing and taxi apps may be convenient for consumers in the short term, but their business models rely on poor treatment of drivers, with questionable categorisations of drivers as self-employed, an issue which has resulted in several instances of litigation against these companies³⁶. Coach operators are required by law to employ drivers with a higher standard of training, and to grant those drivers better working conditions.

It is also worrying to see organisations being openly hostile to coach travel, as seen in recent bans by the National Trust at popular destinations like Birling Gap and Bourton-on-the-Water.³⁷ These measures, driven by concerns over overcrowding and environmental impact, not only encourage car use, but do not account for how restrictions impact passengers with mobility needs and businesses reliant on coach visitors.

Furthermore, heavy government subsidisation of the rail industry also gives trains an unfair advantage over coaches, making their prices (despite widely being thought of as too high) not representative of the true cost of any one journey. In order to fairly compete, the coach industry needs similar support to help bring prices down and service quality up.

RECOMMENDATION: Government should provide a separate regulatory structure for coaches, removing it from the increasingly regulated public transport bus sector and ensuring it is treated as an industry in its own right

36 Bolt private hire drivers follow Uber drivers to court with workers' rights claim, Leigh Day, 2024: <https://tinyurl.com/3wd7wv5r>
37 National Trust bans coaches from popular beauty spot to cut visitor numbers, The Independent, 2025: <https://tinyurl.com/3vsh83uc>

Driver Shortages

As with haulage, the coach industry is currently struggling to recruit new drivers and retain its current workforce. The current driver shortage is estimated to amount to 13.6% of the total workforce³⁸, and is only growing. As a proportion of the approximate national workforce size of 81,000, this number (around 11,000 drivers) is huge, threatening the many communities and businesses who rely on coach transport³⁹.

The lack of recruitment in recent years has also meant the current workforce has aged dramatically. This worsens the challenge, as a large portion of the workforce approach retirement age and little emphasis is placed on encouraging new recruits into the industry. The current training regime inhibits workforce growth, with unflexible and confusing schemes and restrictions on 18-year-old drivers which divert young talent leaving school away from the industry and disincentivise employers from recruiting them.

Compounding this, working conditions are lagging other sectors, further reducing the number of people prepared to work in the coach industry. Since the pandemic, we have seen a change in work patterns and a change in expectations from employees over factors like flexibility of work hours. The historic underinvestment in the industry, linked both to the aging fleet and insufficient government expenditure, have also meant gradually decreasing quality in working conditions for most drivers.

Licensing requirements for coach drivers are also more stringent than for smaller vehicles. All coach drivers have a category D license, a qualification which requires 35 hours of training and up to 5 different tests to obtain a Driver Certificate of Professional Competence first before you are even eligible to apply. This means the coach industry contains a highly skilled workforce, which is difficult to replace.

A shortage of rest stops in high-traffic areas further worsens conditions for drivers, as well as making it difficult for them to abide by the strict time regulations they must follow to keep their passengers and other road users safe. This shortage is also matched at popular coach travel destinations themselves, leading to congestion as coaches are forced to circle dense tourist spots and park in obstructive roadside locations. This shortage in parking needs to be addressed with a more comprehensive understanding of transport requirements at the planning stage and consideration of the needs of the coach industry.

Both working conditions and the current training regime need to be improved if we are to maintain a workforce which can keep coach services up to standard. To this end, we urge the Government to take a number of steps.

RECOMMENDATION: Government should develop a skills and regulation structure that will encourage recruitment and development of staff from age 18 and extend initiatives successful in other sectors to the coach industry to support this

RECOMMENDATION: Government should introduce a Skills Bootcamp course to cover Category D licenses

38 New proposals just the ticket for getting young people into transport, Department for Transport, 2024: <https://tinyurl.com/yc3c3wex>
39 The Economic Impact of Coach Services, KPMG, 2024: <http://bit.ly/3R36ezc>

Post-Pandemic Recovery

As briefly touched upon earlier in this report, government support for the coach industry has been thin on the ground, especially in the wake of the pandemic. The coach industry was critically affected by the reduction in travel during the period. When compared to other affected industries like hospitality and performing artists – both of which received large grants – the coach industry received little support during the period.

There is an urgent need for more support for the coach sector.

RECOMMENDATION: All levels of government should consider a bespoke financial package which supports the long-term viability of the industry, recognises the significant part it has to play in providing sustainable public transport, and drives economic growth

RECOMMENDATION: Government should consider launching a green fund to allow investment in coaches as more environmentally friendly vehicles, better infrastructure provision, tax breaks on investments, and funding for skills

EU Policy

Domestic tourism and coach transport are industries reliant on each other in the UK. Whether travelling to seaside towns, theme parks, school trip locations, or even away legs of sports fixtures, coaches hold a fundamental place in British society transporting our communities for leisure and education. A well-regulated and funded coach industry therefore directly aids the prosperity of areas of the country which are particularly reliant on money coming in from visitors.

UK coach operators also facilitate a large amount of international travel, and EU travel restrictions have only made these routes more difficult and costly. The upcoming EU Entry Exit System (EES) poses a serious threat to international coach operators, while the 90 in 180 day rule already causes havoc for operators trying to comply with EU regulations with a limited supply of drivers. The EES will reduce the capacity of the channel tunnel and ports, driving up prices and causing delays both in the UK and in France. This will bring further unfair advantages for other, less green forms of international travel.

RECOMMENDATION: Government should work with the EU to streamline border control processes, develop pre-registration and online documentation for this, and seek a less restrictive structure for drivers engaged on international journeys

Accessibility Regulation

Coaches already have a strong record of accessibility, along with abiding by higher safety regulations than buses. The Government has committed to review the Public Service Vehicle Accessibility Regulations 2000 (PSVAR) to achieve even better standards in accessibility across transport. One flaw which needs addressing within this review is the focus on accessible vehicles without consideration of infrastructure for boarding and alighting. An over-focus on accessible vehicles will impose extra and unnecessary costs on operators without actually improving the accessibility of transport routes.

The law should therefore focus on the ability for operators to provide accessible journeys, both promoting more accessibility infrastructure at destinations, as well as the operators' procedures for providing these journeys. This more targeted approach would provide better outcomes for mobility impaired individuals, along with removing the inefficiencies of blanket requirements to make all coaches 100% accessible.

RECOMMENDATION: Government should promote inclusivity by legislating for accessibility for all on coaches based on demand, and for the provision of supporting facilities in developments which will attract groups

SUMMARY OF RECOMMENDATIONS

- RECOMMENDATION ONE:** Government and licensing authorities should introduce lower age limits and remove restrictions for young drivers, accompanied by adequate safety and insurance support
- RECOMMENDATION TWO:** Government should provide clarity on safety measures required of buses versus coaches to ensure that the former does not benefit from an unfair competitive advantage
- RECOMMENDATION THREE:** Government should introduce a Skills Bootcamp course to cover Category D licenses
- RECOMMENDATION FOUR:** Government should develop a zero-emission coach travel roadmap in conjunction with the industry up to 2050 – sparing coach operators the burden of complying with varying Low-Emission and Clean Air Zones
- RECOMMENDATION FIVE:** Government should invest in the necessary infrastructure to support the sector's transition to net zero, including the development of electric and hydrogen coaches
- RECOMMENDATION SIX:** Government should look to lower the cost and increase the availability of low-carbon alternative fuels
- RECOMMENDATION SEVEN:** Government and the industry should work directly with industry partners, planners, developers and local authorities to invest in the road infrastructure required to support the net zero transition
- RECOMMENDATION EIGHT:** Government should provide a separate regulatory structure for coaches, removing it from the increasingly regulated public transport bus sector and ensuring it is treated as an industry in its own right
- RECOMMENDATION NINE:** Government should develop a skills and regulation structure that will encourage recruitment and development of staff from age 18 and extend initiatives successful in other sectors to the coach industry to support this
- RECOMMENDATION TEN:** Government should introduce a Skills Bootcamp course to cover Category D licenses and consider lowering the age at which a person can earn their Cat D license
- RECOMMENDATION ELEVEN:** All levels of government should consider a bespoke financial package which supports the long-term viability of the industry, recognises the significant part it has to play in providing sustainable public transport, and drives economic activity
- RECOMMENDATION TWELVE:** Government should consider launching a green fund to allow investment in coaches as more environmentally friendly vehicles, better infrastructure provision, tax breaks on investments, and funding for skills
- RECOMMENDATION THIRTEEN:** Government should work with the EU to streamline border control processes, develop pre-registration and online documentation for this, and seek a less restrictive structure for drivers engaged on international journeys
- RECOMMENDATION FOURTEEN:** Government should promote inclusivity by legislating for accessibility for all on coaches based on demand, and for the provision of supporting facilities in developments which will attract groups

ABOUT THE RHA

The RHA is the leading trade association representing over 8,500 road haulage and coach companies across the UK, 85% of whom are small and medium-sized enterprises (SMEs). 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 agricultural products.

To find out more, [please click here: www.rha.uk.net](http://www.rha.uk.net)

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