

Coach Action Plan - 2025



EXECUTIVE SUMMARY

Coach is an important part of the wider public transport network across the Peninsula Region. It is estimated to bring around 4.9 million tourists into the region each year, who contribute over £250 million to our local economies.

Many people living in the Peninsula Region are employed within the coach industry, adding to our economic vitality and coach, as a mode, increases our connectivity regionally and nationally, provides a flexible and affordable alternative to rail travel, impacts our road system to a lesser extent than private traffic and opens our region to both the wider United Kingdom and beyond.

However, we understand that coach can sometimes be a forgotten mode, left to operate in its largely commercial environment and not often considered when we discuss integration and modal shift at a regional and national level.

To address this, we have developed a **Coach Action Plan** and a clear vision for coach across the Peninsula.

Our Coach Vision - To raise awareness of, and to promote, coach travel as a high quality, accessible and affordable mode for long distance travel to and through the peninsula region, enabling our communities, businesses and visitor economy to thrive.

Through our **Coach Action Plan**, we have identified clear roles for Peninsula Transport. Acting as a **Researcher, Facilitator**, and **Influencer**, we will drive forward the simple and effective actions we have identified.

We have linked the objectives of the **Coach Action Plan** with our overarching Peninsula Transport Strategy and sought to align our approaches with our neighbours in the Western Gateway.

We have worked with a wide range of initial partners and stakeholders to develop the **Coach Action Plan**. One of our early objectives is to set up a virtual **Peninsula Coach Forum** that will ensure more partners can work and interact with us, and each other to deliver early actions and develop the forward-looking agenda for coach.

Engagement through the development of this **Coach Action Plan** revealed six key areas to address with a range of more defined actions, set across a short, medium and long term period. We have set these out at the end of this document and linked these actions back to our vision for coach – and a quick win will be a single source of Peninsula specific information for the coach industry through our **Coach Information Portal**.

Through this **Coach Action Plan**, we will elevate the role of coach regionally and nationally and ensure that through identifying and delivering simple, quick and effective actions we see any investment in time and resources paid back through increased spending in our local economies.

The Peninsula & Our Role



Introduction

Our Coach Vision - To raise awareness of, and to promote, coach travel as a high quality, accessible and affordable mode for long distance travel to and through the peninsula region, enabling our communities, businesses and visitor economy to thrive.

The **Peninsula Transport Region** is an amazing place to live, work and visit with considerable diversity from large towns and cities to market towns, villages and very rural locations.

Good transport connections are vital for a vibrant community and continued growth – this Coach Action Plan sets out our ambition to improve coaches across the Peninsula region for everyone and establishes the link between the overarching **Peninsula Transport Strategy: Strategic Transport Priorities to 2050**.

The Peninsula Transport Strategy sets the vision for transport in the region up to 2050 and identifies four priorities for delivering the strategy:

- **Easier Journeys** - relates to information, ticketing and integration;
- **Going Electric** - relates to Electric Vehicle charging infrastructure, alternative fuels provision, and other low emission infrastructure;
- **A Connected Peninsula** - relates to strategic rail and road links, sustainable travel, intermodal freight connections, and HGV provision, and;
- **Completing the Network** - relates to bringing together the outcomes from the above priorities in a joined-up package that enhances the users travel experience across the region.



These four priorities set the overarching framework under which each further sub-strategy or action plan is developed.

This Coach Action Plan is no different, and through this document we will set out the case for coach across the region, its relationship with the region and how we will work with our partners under each of the four priority areas to deliver our coach vision for the region.

Easier Journeys



Going Electric



A Connected Peninsula



Completing the Transport Network



Peninsula Transport Strategic Context

Peninsula Transport is one of seven Sub-national Transport Bodies (STBs) in England and covers the south west region. It brings together the following five local transport authorities: Cornwall Council, Devon County Council, Somerset Council, Plymouth City Council and Torbay Council, and engages with several co-opted members including the Department for Transport, Network Rail and National Highways. The STB's main role is to provide a single voice to Government on the region's transport investment priorities across all modes, including coach travel.

The coach network provides connectivity between the region's main towns and cities, as well as large cities outside of the peninsula. It is also a key element of the wider transport offer for residents, businesses and tourists.

There are two types of coach services operating in the peninsula. Scheduled coach services provide competitively priced longer distance strategic connectivity between urban centres, providing competition with rail and connections that are not available by rail, providing an alternative to car use. Tourism coaches provide demand led connectivity to the region's tourist hotspots.

The purpose of this action plan is to identify what the quick wins are for improving the regions coach offer for passengers, operators and drivers. It also aims to identify short term (0-2 years), medium term (2-5 years) and long term (5+ years) actions that align with

timescales identified in the region's [Transport Strategy](#).

The aim of the Coach Action Plan for Peninsula region is to support change and speak on behalf of the region so that, together with our partners, we drive investment in coaches, and more widely public transport, and provide a better integrated transport offer for everyone who lives, works and visits the region.

Existing Policy Review

We recognise that coach travel plays a key role in supporting our local economy by supporting local businesses and residents as well as enabling tourists to access the region. Therefore, the Coach Action Plan will contribute to the delivery of Peninsula Transport's strategies, notably the Peninsula Transport Strategy.

Peninsula Transport Strategy (2024)

The Transport Strategy sets the strategic vision for transport in the region to 2050 and identifies four priorities to deliver the region's transport vision (see above).

The strategy includes recognition of the role that coach and bus play in delivering easier journeys through integrated timetabling, ticketing and information. It also recognises that coach travel helps to provide an affordable transport option that is accessible to a wide range of passengers and can deliver against national and local decarbonisation by providing a sustainable alternative to private car travel.

Peninsula Transport is working with local authorities to develop and integrated action plan, as set out in the Transport Strategy.

Going Electric - Technology and Zero Emission Vehicle Study (2023)

In March 2023, Peninsula Transport published its Technology and Zero Emission Vehicle Study (EV Study). The study aims to set a high-level vision for transforming transport in the region using zero emission vehicles. There are several interventions identified within the study to deliver this vision which have been categorised into (i) energy, (ii) digital, and (iii) mobility, all of which are considered to either enable, distribute, influence and integrate transport.

Since being published, significant progress has been made in delivering the interventions within the study. This includes a new officer and stakeholder forum that has been set up in partnership with Western Gateway to help bring together key players from across the region to accelerate the delivery of electric vehicle charge-point infrastructure.

Transport for the North's Electric Vehicle Charging Infrastructure Tool is being shared with our local authority members to support with planning and delivery of infrastructure that meets the needs of the local and visiting population. Lastly, Peninsula Transport and Western Gateway are also developing an EV Action Plan which details the regions plan for supporting the shift to EVs.

In terms of coach travel this presents an opportunity to explore how the industry plans to decarbonise its fleet and operations and what role the STB can play in supporting this. This could include exploring opportunities to collaborate with the freight industry in delivering alternative fuel solutions. Alternatively, what role the coach forum could play in bringing stakeholders together and how

this could be used to address different challenges facing the industry.

South West Freight Strategy (2022) and Alternative Fuels for Road Freight Strategy (2023)

In 2022, Peninsula Transport and Western Gateway published their joint freight strategy, which sets out the issues, opportunities and actions for the industry across the region. The aim of the strategy is to set the pathway to a more efficient and sustainable freight sector. The strategy is based around the following key themes: connectivity, decarbonisation, information and awareness, infrastructure, operational efficiency, and technology. To deliver these themes, the strategy identifies five priority packages: modal shift rail, modal shift coastal shipping, decarbonisation, operational efficiency, and freight forum.

Following its adoption, Peninsula Transport have begun delivering against these packages, notably with facilitating a southwest Freight Forum that brings together key stakeholders from across the sector to collaboratively facilitate the delivery of the strategy.

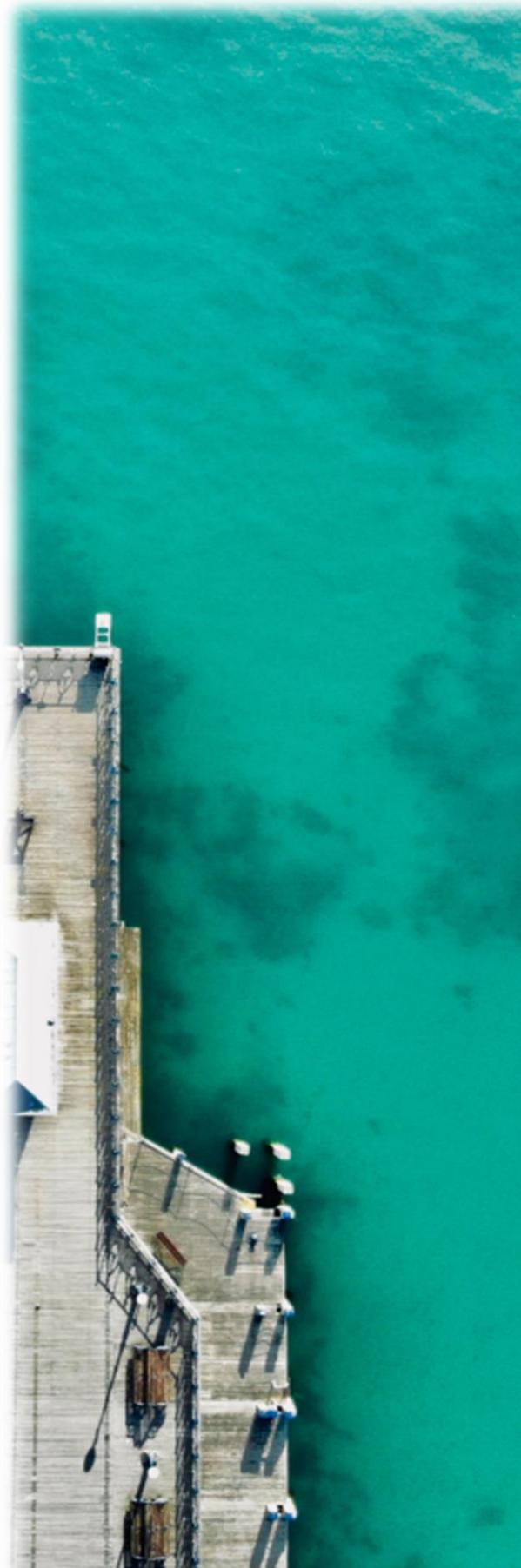
Following this, Peninsula Transport and Western Gateway published their Alternative Fuels for Road Freight Strategy. The strategy has been produced through engagement with stakeholders and businesses as well as forecasting future trends around decarbonising the transport sector. This has led to the Alternative Fuels for Freight Tool (ALFFI) to be developed that estimates the number of electric charging points and hydrogen refuelling

stations that are required to support a fleet of alternatively fuelled Light and Heavy Goods Vehicles.

Although coach and freight form different sectors, they share some common challenges especially regarding fleet decarbonisation over longer distance journeys. Therefore, there is an opportunity for the Alternative Fuels for Freight Tool to benefit the coach industry and identify where there are opportunities for refuelling.

South West Rural Mobility Strategy (2023)

As a joint strategy with Western Gateway, the strategy sets out how the STBs will improve rural mobility for communities that need it across the region. The strategy highlights that providing affordable, decarbonised public transport is key to improving rural mobility. The strategy also identifies locations where rural mobility challenges are most pressing and a framework for delivering solutions to tackle these. The next step in delivering the aims of the strategy is adopting a rural mobility prospectus which outlines potential sites for rural mobility pilots and different packages of interventions. This presents an opportunity to improve rural residents access to transport services, with the potential to include coach travel as part of the transport offer especially in areas where rail services are not available.



The Peninsula's Role

The four priorities set out in our Transport Strategy will be the overarching framework for the more defined aims, objectives and actions outlined in this plan.



To deliver the activities and identified actions within this plan it is proposed that a **Peninsula Coach Forum** will be created. This will be pivotal in bringing together all our partners to deliver our vision for coach and complimenting the Western Gateway STB Coach Forum.

First and foremost, it is essential to recognise the excellent work already being done by our partners across public transport in the Peninsula, and that our role is not to replace that. Our vision for coach and the actions set out in this plan, need to be flexible enough to allow a bespoke approach with each partner through the **Peninsula Coach Forum**, whilst still aiming to achieve overarching consistency in provision and support across the region.

To achieve this, we see our role as threefold: as a **researcher**, an **influencer** and a **facilitator**, best placed to bring partners together to overcome challenges faced by the coach market across the Peninsula. Our vision will ensure that coaches are considered as a vital part of the fabric of the Peninsula – allowing movement, economic benefits, and providing a regional resource to be coordinated and integrated with other transport options. We want to empower people to travel seamlessly across the Peninsula, with coach and tour operators

playing their part in providing this freedom of movement and giving them the tools to do this efficiently, cleanly and seamlessly.

The new Local Transport Plan (LTP) guidance from Government is likely to provide a clear steer on how national, regional and local strategic priorities are to be linked and we see our role in aiding our local authority partners with their LTP's by providing support, advice and strategic direction not only for coaches but across other modes.

To that end we aim to help align and integrate Local Cycling and Walking Infrastructure Plans (LCWIPs), Bus Service Improvement Plans (BSIPs) and Electric Vehicle (EV) charging where Peninsula Transport can add value and make a difference, such as where services and facilities cross LTA boundaries are located, and for more strategic topics such as integrated timetabling, ticketing and information as set out in the following sections of this Action Plan.

Peninsula Transport's Roles



Our roles in detail

Researcher - we will identify gaps in provision and understanding, then explore the art of the possible by undertaking studies into new solutions and existing best practice elsewhere. We will build the evidence base for change and share our findings and tools developed with our partners.

Influencer - we will speak on behalf of the Peninsula to promote the good that is already being done in the region and highlight the challenges it faces. We will engage with government, DfT and other partners to identify and co-ordinate potential funding to increase investment in the region.

Facilitator - we will create the platforms to bring people together to discuss, plan and deliver improvements to buses and coaches at a strategic level. We will lead the realisation of this Vision across the Peninsula and support our partners in local planning decisions that support it.

Who are our partners

We are already proud to work alongside a wide range of partners in the delivery of our Peninsula Transport Strategy. By already working closely with such a diverse group, we are confident in achieving our vision for coach and elevating coach as a mode across the Peninsula region through this Coach Action Plan.

Our partners range across the public sector, including each of the LTAs that make up the Peninsula region (Somerset, Devon, Torbay, Plymouth, and Cornwall), as well as district, city and town councils, National Parks, Tourism organisations, and strategic rail and road bodies.

We will forge partnerships with the private and third sector by working closely with organisations such as the National Trust, commercial bus and coach operators, major attractions, employers, and the hospitality trade to deliver the Coach Action Plan.

Our Coach Action Plan has been reviewed by the Confederation of Passenger Transport (CPT) and we will continue to work with them to embed their 'Coach Friendly' Scheme into the foundations of this Coach Action Plan, so that progress made against each activity builds towards **coach friendly status** for destinations across the Peninsula region.

Bringing our partners together

A key action from this plan will be the formation of the **Peninsula Coach Forum**. We will work to make this a proactive collective of organisations that cut across the coach market in the region. Our model will focus more on smaller interest and working groups focusing on each action within the plan as opposed to larger style periodic meetings.

Our fresh approach will focus on achieving our goals and meeting our coach vision in an efficient way and will be supported by regular board wide digital communications and on-line forums where ideas and information can be exchanged freely, and membership expanded simply.

Coach – its strong relationship with the Peninsula



Why Coaches Matter

Coach and the Peninsula

Coaches provide a distinctly different offer to buses across the Peninsula. Whereas bus provides important daily connections across shorter distances for commuting, education, retail and leisure purposes, coach provides longer distance scheduled connections, access to the region for the tourism market, and local group travel for a range of people and organisations.

Coach, like bus, is also used in the supply of home to school transport. In this market, coach is just one of several vehicle types supplying the market, however, for many coach operators, school transport contracts contribute significantly to the vehicles that are then used across other work around schools.

Across Britain, over **450 million journeys** are made by coach each year, equivalent to 40% of all passenger trips made by rail. Further, coach passengers spend over **£8.3 billion** in local economies across Britain - meaning each single coach passenger trip made can generate around £18 for the local economy. As part of this, across Britain coach passengers contribute around **£5.4 billion** in real spend at tourist destinations each year (CPT, 2024).

These figures show that coach positively contributes to local economies, provides an important local jobs market for people within our communities, and has important downstream impacts on complimentary industries that are vital for the year-round economic vibrancy of the Peninsula region.

Coaches can provide a low cost and flexible solution to regional connectivity, by simply and easily moving people in volume and catering for specific demands at lower cost market entry thresholds.

Coach is an important tool for unlocking the positive economic impacts that groups of travellers may have on the region. It also provides access to and from locations outside the Peninsula and can be an attractive way to offer high quality and comfortable links where these are otherwise missing from the core public transport network.

The Peninsula already benefits from coach. It is well connected by scheduled coach services within and beyond its boundaries and coaches are used daily for a wide range of leisure, tourism and educational activities. However, the supply of coaches has been depleted in recent years through a mix of headwinds including the Covid-19 Pandemic, rising costs of operation, a declining labour market, and an ageing operator base. These issues are often exacerbated by a lack of suitable infrastructure for coaches, a disconnect in some respects between the mix of public, statutory, and commercial organisations dependent on the mode and a systemically indifferent perception of coach in the public arena.

With so much to offer, coach can and should play a more important role in delivering the Peninsula's wider Transport Strategy and Vision for a connected and sustainable public transport network.

Coach – a broad definition

In 2021, the Confederation of Passenger Transport (CPT) defined coach, and travel by coach:

“Coach travel is an inclusive, sustainable, environmentally friendly travel option that reduces air pollution, carbon emissions and road congestion. Coaches provide a vital, comfortable, and environmentally sustainable travel option, and help those who might otherwise struggle to travel.”

Defining coach is important, so that any activities undertaken to improve the environment in which coach operates can be designed carefully to maximise their potential benefit. As such, coach may be seen under two main lenses: firstly, physical design, and secondly through legislation, licensing and operation.

Physical Design

Coach is clearly defined by its physical design and appearance. Whilst coaches may share some common mechanical parts to buses, there has been a long tradition of coach design that has focused on quality and luxury – as such elevating the communal bus product to a height that allows for more comfortable travel over longer distances and time periods.

Coaches are traditionally higher, wider, and longer than vehicles used for local bus services and typically seat anywhere from 24–80 people. Whilst coaches are traditionally 12-metres in length, it is becoming more common for vehicles to be set across three axles up to 15-metres in length.

The length and axle configuration of coaches creates a range of differing turning circles and loading arrangements needing consideration when designing infrastructure that coach will use. Standard 12-metre twin axle coaches have a turning circle of c21-metres, compared to longer 15-metre coaches set over three axles but with a ‘rear-steer’ capability which have a typical turning circle of c24-metres.

Considering a range of vehicle types and sizes when incorporating coach into any new infrastructure, highway and facility improvements is crucial to ensuring coach friendly, safe locations are delivered.

Coach design allows for the stowage of luggage either under the coach floor or to the rear of double deck vehicles. This requires infrastructure design to allow space to access luggage lockers, particularly in interchange environments, and the placement of street furniture is therefore critical to allow luggage access.

Where coaches are designed across a single deck, the floor level is raised to provide a step free internal environment (once on board) and an elevated seat position providing a smoother and higher quality ride for passengers, with better visibility. Double deck coaches have a small lower deck area of seating which may provide better access for those with mobility impairments, with most seats otherwise housed on the upper deck.

Coaches are often now equipped with toilets and a variety of additional features to ensure a comfortable passenger experience, including but not limited to air-conditioning, WiFi, USB charging points, monitors, and galley kitchen facilities. Again, coach operators need facilities to ensure these are well maintained and can be cleaned, particularly on-board toilets.

Coach Accessibility

Coaches have been inherently difficult to make fully accessible due to their design and in particular floor height – however, regulations are now in place to ensure access to buses and coaches for those with mobility or other difficulties. Public Service Vehicles Accessibility Regulations (PSVAR) govern the accessibility of new build buses and coaches in the UK.

The requirements that PSVAR places on coaches are:

- **Wheelchair access:** Coaches must have a wheelchair lift.
- **Accessibility:** Coaches must be easily accessible.
- **Signage:** Coaches must have large digital signage for people with visual impairments.
- **Identification:** Coaches must be easily identifiable.
- **Driver training:** Drivers must be fully trained in the use of the wheelchair lift and other equipment.
- **Conformity certificate:** All coaches that are used for local or scheduled services must have a conformity certificate.

PSVAR have applied to new coaches and buses that carry more than 22 passengers and are used on local or scheduled services since 2000 and for Home to School and Rail Replacement services from 2022. Coaches used wholly for leisure and tour markets, however, remain optional in their compliance with PSVAR.

'Designing-In' coaches

Coaches that incorporate wheelchair lifts need space to deploy these facilities and for the users to access the lifts (often a minimum of 1-metre beyond the area required for the fully deployed lift).

Lifts may be located at the front of the coach with access through the forward entry door or in the centre of the coach using a separate door and a cassette style lift. Both types of access create different challenges for infrastructure supporting coach operation that should be considered when updating current and/or designing new transport facilities.

Access to luggage lockers has already been discussed. However, the consideration of coach and its different levels of operation are important when designing public transport facilities. Coaches have a larger front over-hang and rear tail swing than buses – meaning that they perform differently at road junctions and within transport facilities. They require different levels of space around the vehicle at drive-in/reverse-out and/or drive-in/drive-out terminals and sometimes require passenger access midway down the vehicle.

The Peninsula attracts many coaches from the continent. Whilst these have very similar design and construction standards to UK coaches and must comply with maximum UK standards for length, width and height the right-hand drive configuration can create problems for passengers when operating in the UK.

While higher specification coaches have a 'continental door' situated in the middle of the coach on the opposite side to the forward entry door allowing kerb-side access for passengers, consideration should be given to infrastructure design for right hand drive coaches when large numbers access specific locations.

Understanding the movement of drivers and passengers, how they use coaches and the environment around them is important when improving coach facilities.

The Strategic Road Network

The Strategic Road Network (SRN) plays a vital role in the movement of people across the region. Coach operators use a substantial amount of the local road network and for the Coach Action Plan it is important the entire network is considered. National Highways has identified several key challenges that the SRN faces including congestion and journey time reliability. Some of the routes which face challenges include the A30, A303, M5, A38 and A35. There are opportunities to help support the industry ranging from encouraging modal shift, continued investment on the network through RIS3, use of technology and data to inform decisions and better communications

with coach operators on disruptions and maintenance plans.

National Highways already has a Bus and Coach Forum in place that hosts three meetings each year with the industry. National Highways are also taking forward plans to better monitor coach use across the SRN – in particular:

- The Bus and Coach Plan (launch from Q3 2023/24) – to develop a plan to improve bus and coach operators', and passengers' experience on the SRN.
- Route Strategies Evidence (Completion by Q1 2024/25) – to review Route Strategies evidence to identify issues and opportunities to support the bus and coach sector.
- Bus and Coach Journey Maps (Completion Q1 2024/25) – to develop maps to understand the bus and coach interactions with National Highways and identify areas for further research and improvement.
- Strategic Bus and Coach Corridor Studies (Completion Q3 2024/25) – to pilot studies to identify opportunities for improved integration.

It will be important to have National Highways as a partner in our **Peninsula Coach Forum** and to work closely with the National Highways Bus and Coach Plan.

Construction and use of coaches

Coaches are classified in construction and use regulations as 'a large bus (i.e. 17 or more seats) weighing over 7,500kg and capable of speeds of over 60mph'. However, whilst coaches are not specifically named in Transport Act legislation or licencing, the services they perform are and fall under three categories in the Transport Act 1980 stage; express; or contract carriage. These are differentiated by the distances between passenger boarding points and the way in which fares are applied.

Coaches are used across each service category with the holiday, day-tour, and private hire markets the traditional areas of work for coach firms. Historically coaches have also played a role in stage carriage. However, PSVAR has largely ruled this out since 2022 and seen coach focus on contract and express work – and where coach is used for express, home to school, and rail replacement services, vehicles must also now be PSVAR compliant.

When operating coaches, all operators must hold an operator ('O') licence - requiring several conditions to be met, including being of good financial repute and having suitable maintenance and parking facilities. An 'O' licence disc must be held for each vehicle operated allowing use as either a stage, express, or contract carriage vehicle. To run vehicles, operators and drivers must comply with driver hours rules. These can be either Great British (GB) Domestic Driver Hours Rules (typically used for stage carriage), and European Union (EU) Driver Hours Rules (typically used for express and contract carriage).

Scheduled Express

A thriving scheduled express coach market exists in the UK. With no state support or financial interventions, the market is commercial and free to develop and be continually redefined by changes in demand and supply as well as market disruptions that bring in new passenger groups and market suppliers.

Express services are defined as those where stops are more than 30-miles apart with separate fares charged. Services do not need to be 'registered' with a Traffic Commissioner and are not confined to the periods of notice required for 'registered' local services. As a result, 'express' can be flexible and responsive to demand but cannot be included as part of the local bus network unless sections of route are registered.

Currently there are two core providers: National Express and FlixBus, alongside a low level of private operator provision focused on niche markets.

National Express is the largest provider with c19 million passengers travelling on a network of 101 routes serving 437 coach stops. The second largest supplier, FlixBus carry c2 million passengers and serve around 70 locations nationally. Megabus ended most services at the end of 2024 but continues the 24/7 Falcon service between Bristol and Plymouth – vital to the Peninsula region.

The fully deregulated market provides an opportunity for other coach firms to run services, e.g., Berrys who run four daily services to London - each originating from the edge of the Peninsula region.

School and Contract Hire

Coach plays an important role in home to school transport in each local authority area across the Peninsula. This is commonly supplemented by additional contract and private hire work directly for schools and educational facilities which makes use of coach's midweek availability, away from its peak in demand across weekends. A typical coach operator may see up to 31% of their income generated through a mix of home to school transport, school trips and corporate travel (CPT, 2021).

There are 45 companies across the Peninsula providing private hire minibus and coach services which does not include coach operators in the Western Gateway STB region which also provide services in Somerset. Most (30) coach operators run between 1 and 15 vehicles, and nearly 90% of all coach operators run no more than 35 vehicles.

Tours and Private Hire

The Peninsula region is a popular area for incoming tours (from outside the region) as well as providing a good level of demand for local tours, daytrips and private hire opportunities for coach operators.

The inbound tour market is one that each region should work hard to accommodate, as each passenger has the potential to add to the local economy and generate further demand through a positive experience feeding repeat visits and word-of-mouth recommendation.

Largely internal to the region, the private hire market for coaches is also strong. However, more could be done to prioritise coaches in town and city centres as well as at leisure facilities and

major attractions. Driver facilities are particularly important in this sector, and others, and it is important to note that many coach drivers have freedom of choice when it comes to selecting locations to take a break, with or without their coach passengers. Therefore, good facilities will draw coach drivers to them, improving the economic activity at these locations.

When combined, a typical coach operator may see up to 59% of their revenue generated through private hire, domestic and international (in-bound) tourism and trips to large-scale organised events - e.g. concerts and sports events (CPT, 2021).

Tours and daytrips rely on good coach facilities for their passengers and drivers. These will encourage coach operators and tour firms to plan trips based on towns, cities, and attractions in our region.



Economic Impacts of the Coach Market

With 80% of the coach industry’s work based in the tourism sector, coach enables **23 million** visits to tourist attractions and locations annually with this contributing an estimated **£14 billion** to the UK economy (CPT, 2021).

In a recent study of the economic impact of coach services the (CPT, 2024) estimated the total economic impact of coach passengers interacting with local economies (‘spend’) across the South West Region (excluding the West of England Combined Authority) was **c.£540 million per year** – second only to London, the South East England, and Scotland.

Whilst the CPT’s study area does not exactly replicate the Peninsula region as it includes Gloucestershire, North Somerset, Wiltshire, Swindon, Dorset, and Bournemouth, the proportions are likely to be a good proxy for the Peninsula region itself.

This study outlined the spend potential by category for each coach passenger, coach size and each type of coach trip - summarised in Table 1 below.

Table 1 demonstrates the spending power of coach passengers. When considered with earlier data outlining the economic impact of coach passengers it is estimated that across the wider South West study area **c.8.9 million** coach passenger trips are made annually – equivalent to over 180,000 standard 49-seat coaches.

In population terms the Peninsula region presents around 55% of the wider South West study area. It is reasonable, therefore, to assume that at least half of these passengers and coaches would travel into the Peninsula, and potentially more, owing to the Peninsula’s significant tourist destination status.

This could mean upwards of **4.9 million** coach tourism passenger trips occur within the Peninsula region, and more than **100,000** standard 49-seat coaches enter and tour across the Peninsula region annually. This is estimated to generate upwards of **£88 million** per year.

Table 1 – Spend Levels per passenger and by volume

| | Shopping & Leisure | One Day Trip | Overnight Trip | 7-night Trip |
|--------------|--------------------|--------------|----------------|--------------|
| passenger | £37 | £69 | £124 | £709 |
| 10 str coach | £371 | £690 | £1,239 | £7,095 |
| 49 str coach | £1,816 | £3,381 | £6,073 | £34,765 |
| 65 str coach | £2,408 | £4,485 | £8,056 | £46,117 |



The Current Public Transport Network

Across the Peninsula region there are a range of public transport opportunities available to residents and visitors.

Scheduled coach services

Scheduled express coach provides links from as far west as Penzance with direct services to London and calling points through the Peninsula. Further east, a denser coach network connects the Peninsula (Devon and Somerset) with London as well as Bristol and Birmingham, where onward connections are available.

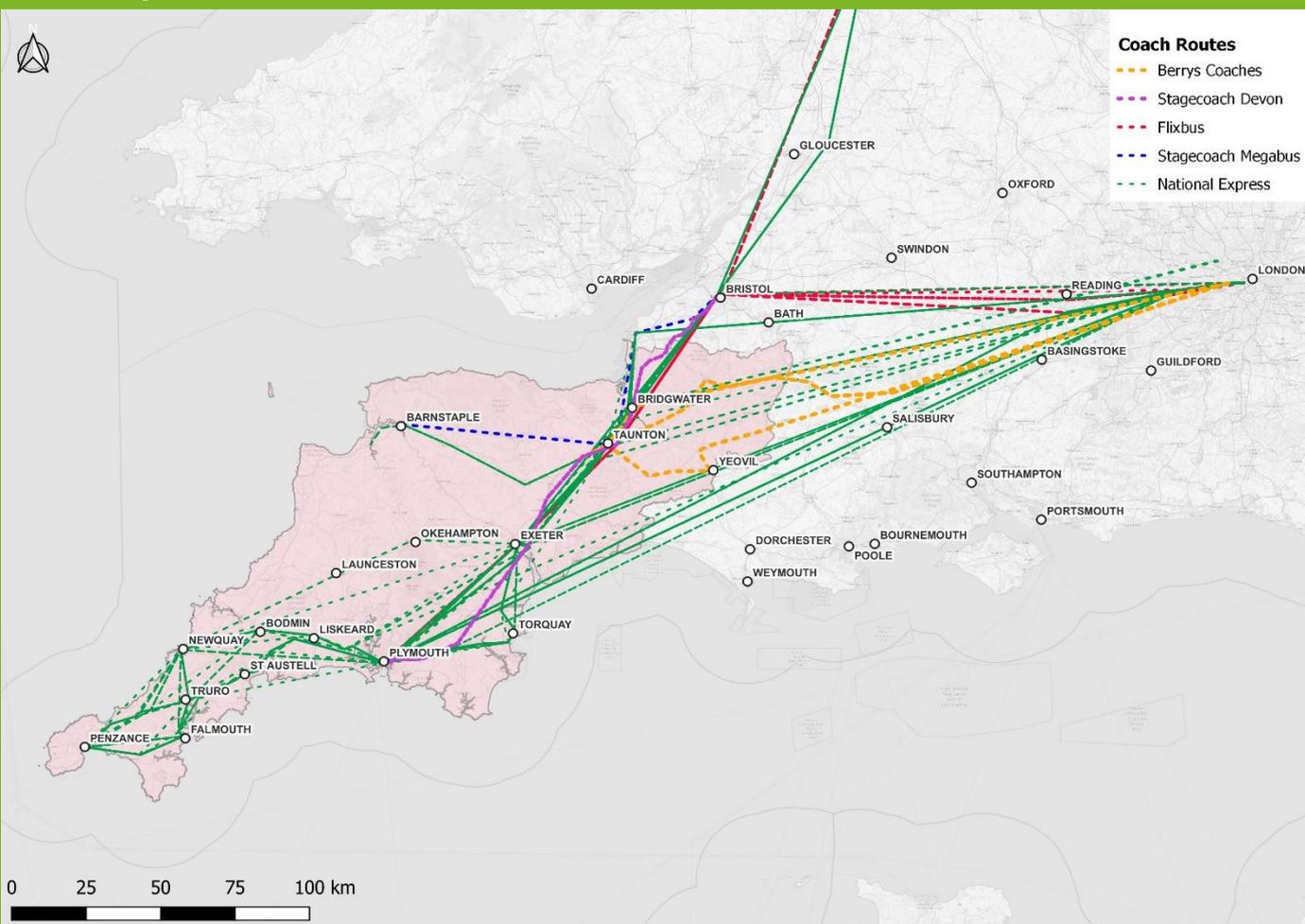
Figure 1 shows the map of direct coach connections within and outside the Peninsula region originating from the prominent cities and towns in the region.

The airport market is strong, with most of the Peninsula connected to Bristol (regional) and London Heathrow (international) airports.

The regional coach network hubs in Plymouth where some trips to locations within the Peninsula require a change. There are less westbound connections beyond the city in contrast to a larger number of destinations served eastbound - with the network becoming ever denser towards Bristol.

Whilst services to Barnstaple and Okehampton exist, the north coast areas of Cornwall and Devon are markedly lacking in coach connections compared to other parts of the Peninsula region.

Figure 1 Direct coach connections



National and local rail services

In contrast to scheduled coach, most cities and towns across the Peninsula have a direct rail connection with other Peninsula location without any / more than one interchange - as shown in Figure 2.

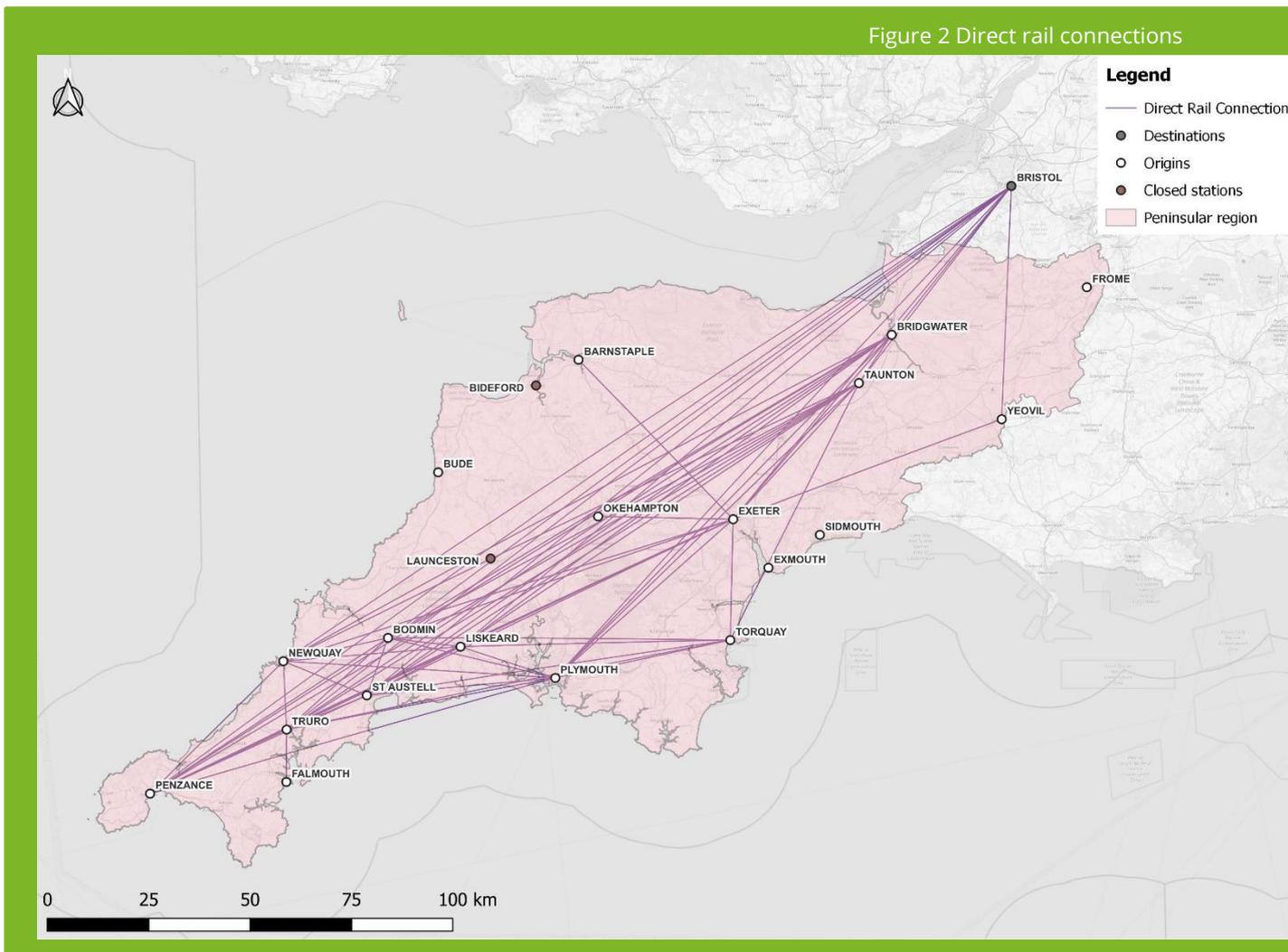
However, as with coach, there are significant gaps in network provision along the north coast of the region - between north-east Cornwall, through Devon and within Somerset.

Unlike coach, nearly all rail services run through Bristol, providing connections to Wales, the Midlands and North, and the south coast. It is notable that no coach link between the Peninsula and the south coast exists, this instead being available by rail from Bristol.

Rail not only provides national connections from the Peninsula region - effectively in competition with coach, but it also provides easier to access internal services throughout the Peninsula - instead complementing the local bus network and providing opportunities for rail / bus connected trips. In time this will be further enhanced with regional integrated ticketing between rail and bus.

How can we increase regional connections, turn coach into a complementary mode and add coach to the future integrated ticketing approach.

Figure 2 Direct rail connections



Local bus networks

In comparison to coach and rail, bus connections are comprehensive across the Peninsula region, although less dense across the north coast area as shown in Figure 3.

Local bus networks across the Peninsula are typified by clusters of relatively high-frequency bus routes across local and rural networks that tend towards one or more prominent cities and towns.

Figure 3 shows that several short corridors with more than 300 buses per week exist around the key locations of Torquay, Penzance, Plymouth, Exeter, Truro and Barnstaple.

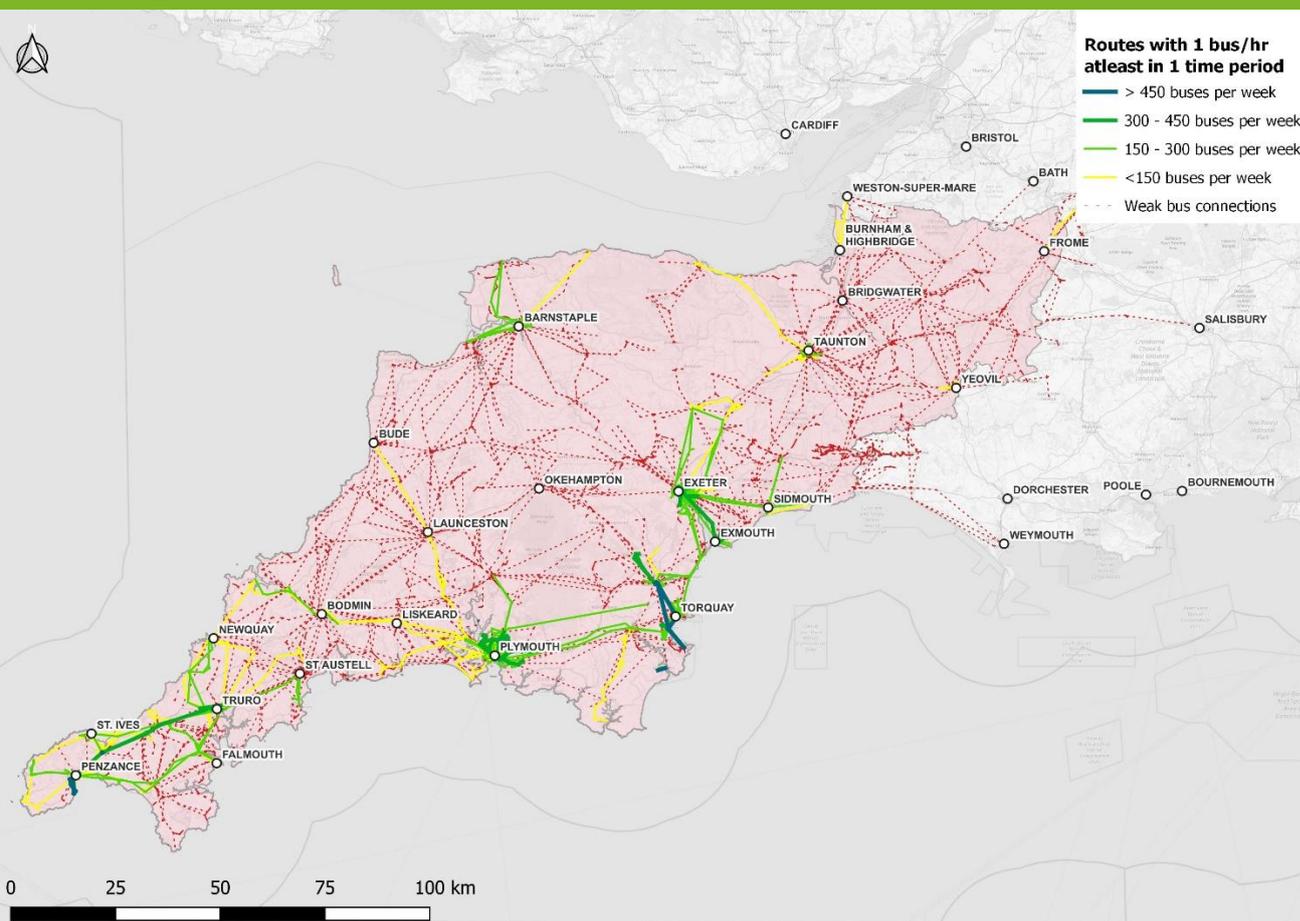
However, more commonly across the Peninsula region, bus service levels with far fewer than 300 buses per week proliferate - with many locations often having an hourly (or less) bus frequency.

This could mean a role for coach in providing rural connectivity as part of a longer-distance network, or resources used for lower frequency bus services being repurposed towards a strategic network approach.

Stakeholders have told us of a few gaps in existing bus and rail networks and an absence of services connecting several locations to their nearest city or town, in addition to missing links to regional airports and sea ports (e.g. Torbay to Bristol Airport, regional connectivity to Exeter and Newquay Airports and links to/from Falmouth and Fowey).

Changes to local bus services has resulted in fewer 'inter-urban' services - presenting an opportunity for coach.

Figure 3 Direct bus connections



Raising the quality of coach

With **c4.9 million** tourism passengers spending over **£250 million per year** in the Peninsula in addition to passengers across the express coach and contract hire markets, coach is very important to the economic success of the Peninsula and its connection to the UK and beyond.

However, stakeholder analysis (outlined in greater detail later) confirms a small number of shortcomings with the coach offer to the Peninsula and areas where coach may have a more prominent role. The three main areas are outlined below.

Filling gaps in the region's network

A review of the current public transport offer across the peninsula, and discussions with a range of stakeholders has identified:

- Underserved areas / missing links
- Greater integration opportunities

These present an opportunity to review the role of inter-urban services, either through quality express bus and/or coach links directly between cities and towns or to feed into existing coach and rail corridors.

There may be potential to review, rationalise, and reposition existing low frequency bus connections to become express routes with high-quality services and branding (e.g. TrawsCymru in Wales).

This could positively influence mode shift towards public transport, provide connectivity for all and attract new passengers – from both visitors using a simple and consistent Peninsula network to better access airport, sea ports, existing and unconnected tourist locations (improving the economy of the region), and locally for residents making regular journeys for work and education – an example would be to provide a new link between Torbay and Bristol Airport.

Any new express services or regional network could be modelled on the Falcon service – an excellent example within the Peninsula of a fast, regular coach serving multiple markets. Replicating the Falcon could fill gaps in the current network and provide interchange with rail and bus.

There is also a great opportunity to better integrate existing (and any future) coach services into the wider public transport network. The first step in this process will be the **Peninsula Coach Forum** – a virtual information exchange platform that will trigger task and finish working groups to address key issues.

Integration opportunities include: the inclusion of 'coach' and it's market in any work to upgrade or replace transport interchange facilities; consideration of coach in plans for integrated ticketing between bus and rail across the Peninsula; better sharing of information regarding the road network and service changes to allow us to plan ahead for changes and limit their impact; and a consistent approach for coach across the region's Enhanced (Bus) Partnerships to allow coach to serve local communities.



Better coach facilities

The importance of high-quality coach facilities has been cited by numerous stakeholders, and is an essential part of the criteria in becoming accredited with **Coach Friendly Status** through the CPT.

An absence of well signed and designed parking and/or interchange facilities in city, town and tourist attraction locations as well as with rail presents significant issues for passengers and drivers alike.

Additionally, issues caused by the absence of integrated connections with local bus networks are also aggravated due to the tendency of scheduled express coaches to not enter city and town centres – this can result in passengers being stranded on the outskirts of urban areas after alighting coaches or having problems accessing the network in the first place. An action to work more closely with the scheduled express coach market to mitigate access issues and/or make better use of urban Park & Ride locations would be an important first step.

There is an opportunity to fully audit the level of coach parking and interchange provision across the Peninsula region, with an initial action to gather into one place information for all existing coach parking and coach pick-up/drop-off bays.

The CPT's Coach Friendly Status checklist provides the framework by which to approach facility improvements and adoption of this as a guiding document by the proposed **Peninsula Coach Forum** is recommended as an initial action.

Coach information

It is evident from a wide range of engagement that numerous coach facilities exist - in various locations and in various forms.

However, a lack of consistency in how information is made available in each area of the Peninsula region makes understanding the availability of coach facilities challenging – particularly to inbound tour coach operators.

As noted above, there is the opportunity to centralise this information and stimulate a further audit of coach facilities and wayfinding.

Onward wayfinding for coach users is also important. There is an opportunity to provide information in digital format to operators (e.g. National Express) so that this can be added to ticket information. Coach tour operators have asked for simpler printed information for their customers as well as online information that they can print out.

Across these main areas, and potentially others, there is an opportunity through cost effective and simple actions to improve coach across the Peninsula region – raising the quality of coach travel.



Our Coach Vision



Our Coach Vision

The vision, aims, and objectives of our Peninsula Coach Action Plan have been aligned to the region's Transport Strategy and Vision for 2050.

This is to ensure that a joined up and consistent approach has been adopted to improving coach travel for operators, drivers and passengers across the region.

The Peninsula's wider vision is to:

"Transform transport across the peninsula, enabling our society and economy to thrive and our unique and outstanding environment to flourish".

Therefore, the vision for our Coach Action Plan incorporates features of the region's vision whilst recognising the potential for coach in improving the region's transport and economic offer, as shown below.

Our Coach Vision – For coach travel to be a high quality, accessible and affordable mode for long distance travel to and through the peninsula region, enabling our communities, businesses and visitor economy to thrive.

As described earlier, the **Peninsula Coach Forum** will deliver actions to deliver this vision through its roles as:

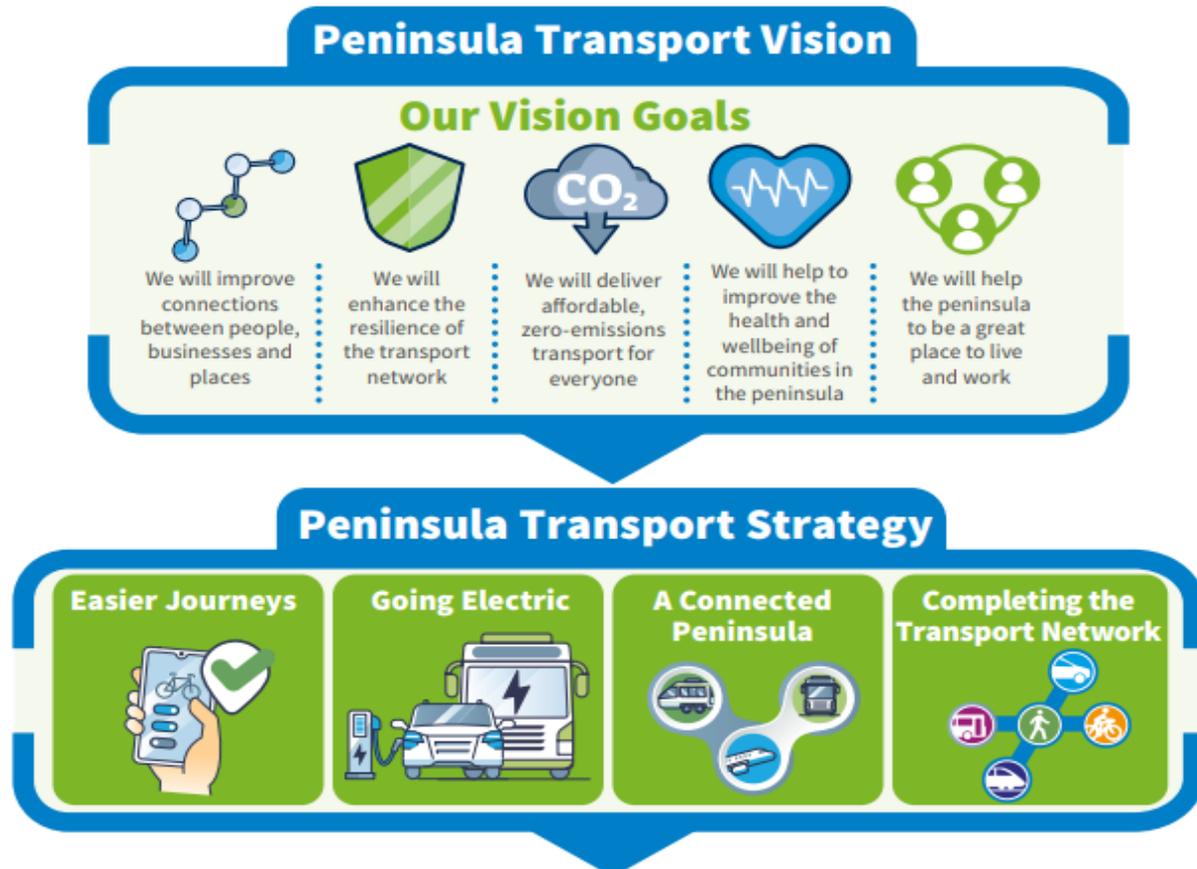
- **Researcher**
- **Facilitator**
- **Influencer**



The Coach Action Plan and Our Goals

The vision for the Coach Action Plan is underpinned by the five transport and mobility goals and the four transport strategy priorities (outlined earlier) adopted in 2023.

The relationship between these is shown below, including how the Coach Action Plan aligns and supports the delivery of the region’s goals and transport priorities.



| | | | |
|---|--|---|--|
| <p>Coach helps to fill gaps in the existing network, providing more residents and visitors with access to the region’s towns, attractions and airports. By working together, this action plan can enable more members of society have better access to these opportunities.</p> | <p>We can align decarbonising coach with other modes, including the bus and freight industry. As an STB we are in a unique position to bring key stakeholders from different industries together to enhance the regions zero emission offer and become a green tourism location.</p> | <p>We want to provide residents, visitors and businesses with a resilient and reliable transport network. Coach forms part of the region’s transport offer, helping to ensure people can continue to move around during extreme weather events and network disruptions.</p> | <p>Coach is a mode for all offering an affordable and accessible transport option to a range of users. In parallel to this, coach has a fundamental role in enabling young people across the region to access education and extra-curricular activities.</p> |
|---|--|---|--|

Our Aims and Objectives

Our Aims

To deliver the Coach Actions Plan's vision, six aims have been identified.

These aims are designed to align with the six main themes that have emerged from the stakeholder engagement undertaken in the preparation of this Coach Action Plan and which is described in the next section.

Our **Coach Action Plan Aims** are:

1. To elevate coach as a mode in the region
2. To bring stakeholders together to better integrate coach with other transport modes and regional priorities.
3. To help drive resilient and sustainable economic growth within the region.
4. To increase passenger awareness of opportunities for travelling by coach as a reliable, affordable and accessible mode.
5. To showcase the benefits that coach has to economic growth, decarbonisation, local businesses and society.
6. To support with decarbonising the coach industry through collaborative working.

Our Objectives

To deliver our vision and aims, we have developed a series of measurable objectives.

Our **Coach Action Plan Objectives** are:

- To increase the number of CPT **Coach Friendly Status** sites in the region on an annual basis as a tool for enhancing and promoting coach facilities.
- To introduce a single platform for sharing information on where coach parking and facilities can be found in the region.
- To introduce an online **Peninsula Coach Forum** so stakeholders can virtually share information and best practice and form task and finish working groups to address key challenges and actions.
- To improve the perception of coach across the region and measure this through online surveys.
- To explore opportunities to include coach as part of the integrated bus and rail ticketing offer for the region.
- To explore opportunities for a quality coach express service to help fill gaps in the network.

Working together



Stakeholder Key Themes

Our Stakeholders

The Coach Action Plan has been developed through stakeholder engagement sessions with a range of key stakeholders across the region and coach industry, including:

- Member Authorities
- Scheduled Express Operators
- Local Operators
- Visiting Operators
- Tourism Boards
- Tourist Attractions
- Industry Representatives

Thematic Analysis

Following these sessions, a detailed Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis was carried out. This showed that there were some high level common themes emerging across the different stakeholders including: (i) the role that coach has in providing a low cost, sustainable mode of transport for many people, (ii) how it enables many children to access school and extracurricular activities and (iii) that it is a flexible and adaptable mode of public transport that can reach a range of rural and urban locations, especially deep rural locations without rail access.

However, the engagement also showed that sourcing information on coach parking facilities can be challenging, passenger's previous experience of coach has led to them having a negative perception of coach travel despite the quality of the vehicles improving over time, and that there is limited

communication between different stakeholders. Therefore, this Coach Action Plan has provided the first step in starting the conversation between different stakeholders so the benefits and challenges of coach can be shared and addressed to create a better experience for passengers, operators, local businesses and member authorities.

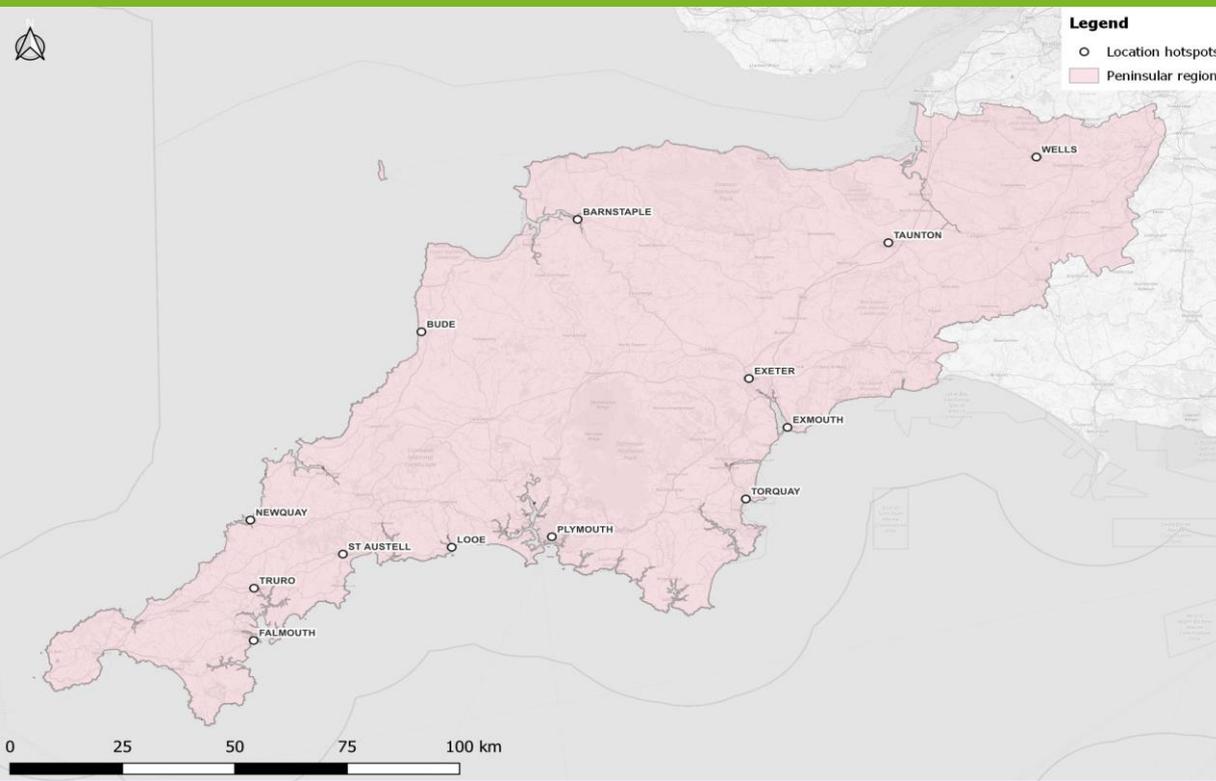
Hotspot Locations

The engagement sessions also highlighted hotspot locations where improvements to coach parking and facilities could have the greatest initial impact. Coach passengers spend £5.4bn per year across the country's tourist destinations, and whilst this is a national figure, the Peninsula region is known as one of the countries tourist hotspots with a range of seaside resorts, visitor attractions, national parks, towns and cities. Therefore, showcasing coach friendly sites has the potential to further boost the local and regional economy by better showcasing itself to operators. The hotspot locations are shown in **Table 2** below and in the map in **Figure 4**:

Table 2 – Hotspot Locations for Coach Accreditation

| Hotspot Locations | |
|-------------------|------------|
| Falmouth | Plymouth |
| Truro | Torquay |
| Newquay | Exmouth |
| St Austell | Exeter |
| Looe | Barnstaple |
| Bude | Taunton |
| Wells | |

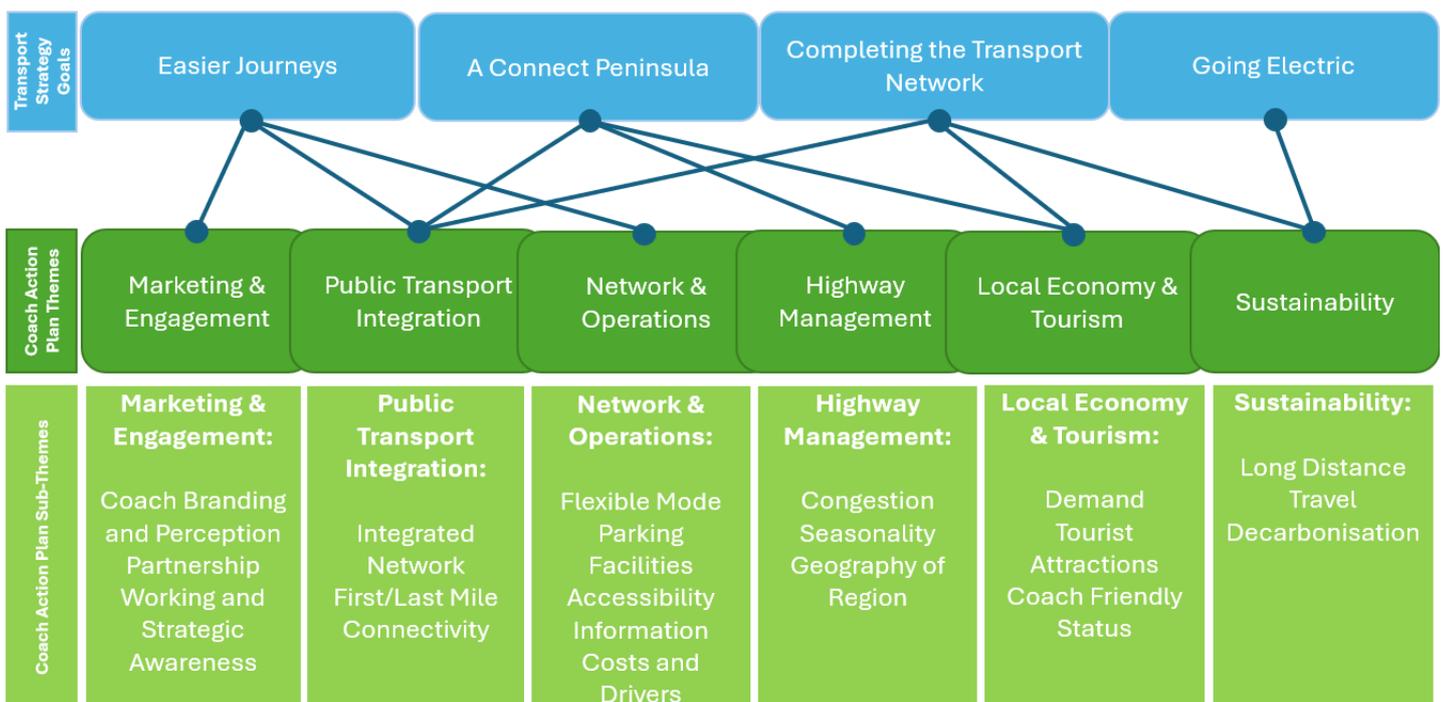
Figure 4 Coach Improvement Hotspot Locations



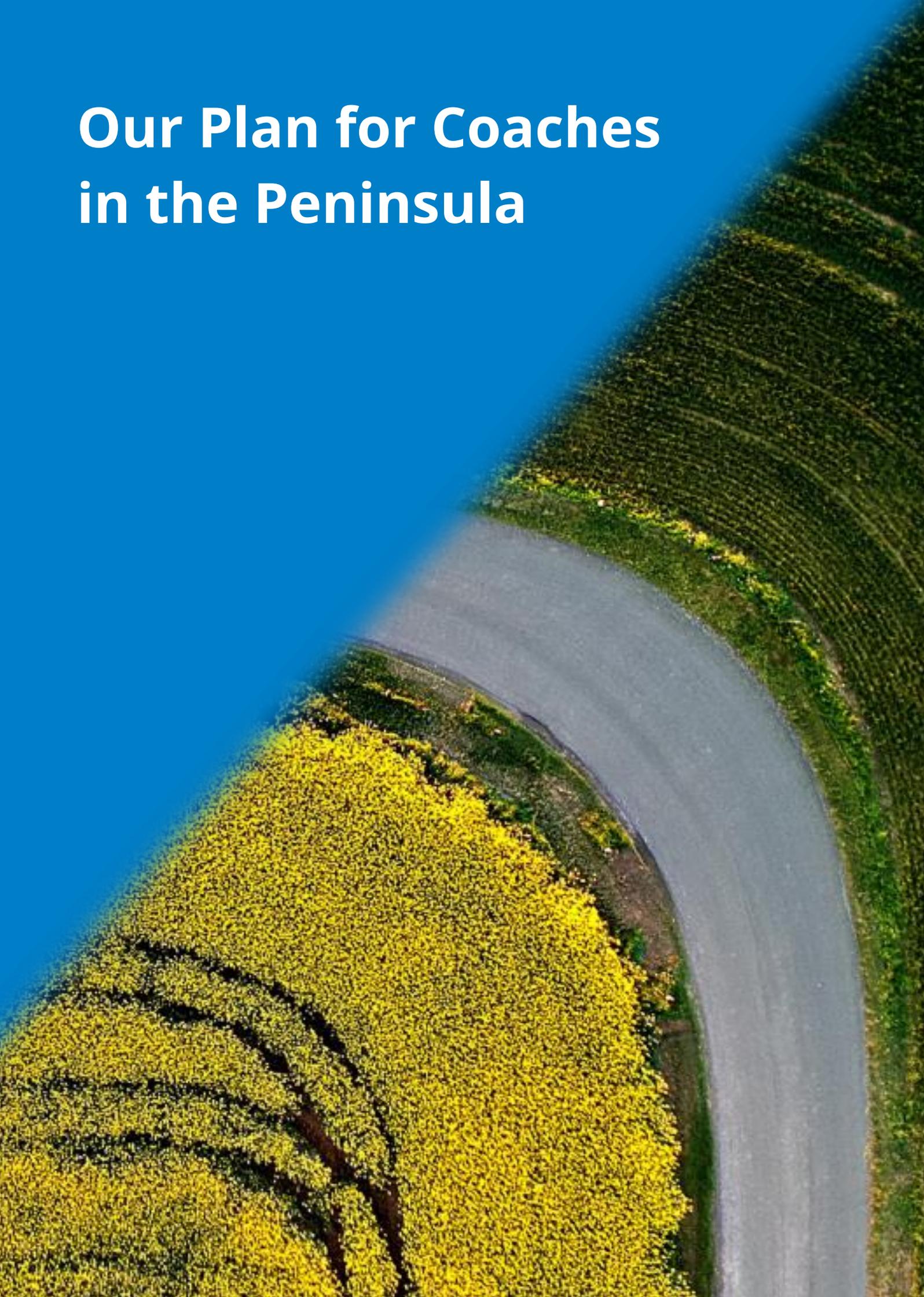
Six key themes with a series of sub-themes emerged from the stakeholder engagement and have formed the basis of the Coach Action Plan - to integrate with and contribute to the transport strategy goals, as highlighted below.

The six key themes are:

- Marketing & Engagement
- Public Transport Integration
- Network & Operations
- Highway Management
- Local Economy & Tourism
- Green Transport



Our Plan for Coaches in the Peninsula



Our Coach Action Plan

This section sets out the actions for improving coach travel across the Peninsula Transport region in all its forms described earlier.

All the actions have been identified in response to the stakeholder engagement discussed in the previous section.

In turn each action delivers against the six key themes of the action plan as well as the four transport strategy goals. Although the actions have been grouped against a specific theme, it is important to note that in most cases each action will support the improvement of multiple themes and typically have multiple benefits associated to each.

We discuss the high-level actions across each of the six themes in more detail below, spotlighting some of the key actions we see as elevating coach across the region. We then show all the proposed actions in Table 3 further below.

Marketing & Engagement

The stakeholder engagement sessions highlighted that a key strength of coach travel is that it provides an affordable, flexible and accessible mode of transport for a range of users from students to older travellers, those on lower incomes, lone female travellers, and groups wanting a high-quality experience.

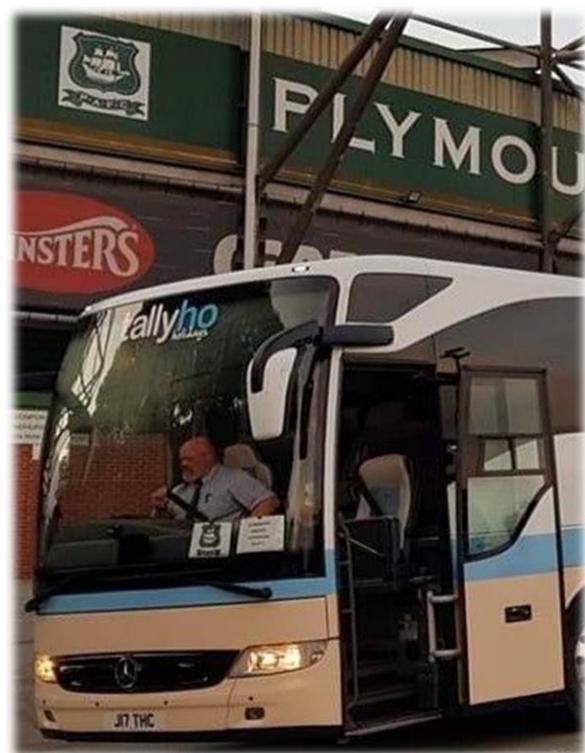
Despite the quality of the coach market improving there a negative perception of the mode appears to persist alongside a continued lack of awareness regarding available coach services, facilities, and the positive impact coach has in economic terms.

To solve this, better promotion of coach through awareness raising and positive perceptions of quality are needed in combination with improvements to information regarding services (timetables and maps), infrastructure, on-board facilities and coach's benefits to decarbonising travel.

Well delivered as a package, these would elevate coach as a mode.

Partnership working to achieve this is fundamental and bringing together key players to improve the perception and awareness of coach, its services, and how it can help to achieve regional and local strategic objectives is critical.

We will facilitate work between all our partners to create a **'coaches welcome'** campaign – this will promote the Peninsula and its coach facilities.



Public Transport Integration

Engagement with stakeholders also highlighted an appetite for coach to be better considered as part of an integrated transport network with bus and rail.

This includes exploring opportunities to include coach as part of interchange hubs and encouraging the use of other public transport modes as part of the passenger's wider onward connected journey. This was seen as especially important in deep rural locations with one solution being the inclusion of coach data feeds into regional and local Real Time Information (RTI) systems – something the scheduled coach market is ready and able to supply, and which could elevate the perception of coach in several ways, including the safety of waiting passengers.

Through the **Peninsula Coach Forum**, we will seek to influence the scheduled coach market to work closely with us and consider improved services across the Peninsula which we will jointly promote.

We will research opportunities for a more strategic Peninsula coach network and how intelligent systems can include coach (e.g. integrated ticketing and RTI).

An approach to better integration also creates an opportunity to enhance first and last mile connectivity due to coach stops sometimes being located away from central locations and/or without connections to other modes of sustainable transport.



Network & Operations

Coach offers a flexible and adaptable service that can meet passenger demand. This means it can provide areas without railway access, an affordable mode of long-distance transport - filling any gaps in the network that currently do not have this level of provision. This could be achieved by exploring new opportunities to connect more people to the coach network, by linking the Coach Action Plan to the Peninsula's Rural Mobility pilot's work.

Furthermore, the quality of coach stops, and parking infrastructure and facilities varies across the region. This creates accessibility challenges for coach passengers, with some stops not being suitable for disabled access or coach infrastructure being disconnected from other networks. One solution, to provide operators with a **one-stop-shop portal** for information on coach stops, parking and facilities was identified as a quick win for making coach access easier, the passenger experience more consistent, and coach management more effective.

We know that information about coaches is currently located across many spaces. We will facilitate work to create and host a single **Coach Information Portal**.

Drawing data from across the region, we will show in one easy to navigate space all the information coach operators need to plan and conduct coach journeys across the Peninsula.

Rising costs and driver shortages continues to be a challenge across many sectors. This includes a growth in cost for vehicles, fuel and other operations for coaches. Despite this, coach remains an affordable option for long distance travel in comparison to other options. Although rising costs continue to be a risk to many, the Coach Action Plan aims to support partners coming together through the **Peninsula Coach Forum** to continue to provide residents and visitors a low-cost transport option and find solutions to various market challenges together.

Being able to highlight and work through the challenges that face the coach industry in a constructive and efficient way is important to all our partners and the region.

To bring everyone together and deliver our Coach Action Plan we will establish a **Peninsula Coach Forum**.

This will be unique as a virtual forum. We want to replace the traditional format of periodic meetings with a real-time platform where members can raise issues, seek information and answers, exchange ideas and update others on the latest developments virtually and in real-time.

In the busy coach industry environment, we feel this approach will work better for everyone. The virtual forum will be strengthened with task specific working groups – developed to deliver key actions within the Coach Action Plan, and which may follow more traditional joint-working formats where these may be more appropriate in delivering each task or use similar virtual tools.

Highway Management

The influx of traffic through the summer months can lead to congested SRN and local links. The unique geographical character of the region, with rural lanes can further add to the challenge. Coach alone cannot solve these challenges, however, by working closely with other key stakeholders (e.g. through the **National Highways Bus and Coach Plan**) there is an opportunity to better understand these issues and how to overcome them.

We will work closely with colleagues at National Highways and local highway authorities to take forward ideas and facilitate outcomes that improve conditions for coach travel across our roads.

Our ideas include facilitating work to create a visualised and interactive map of road widths, height restrictions, and tight bends to assist coach operators to plan safe and appropriate routes for their vehicles.

We will also work hard to influence signage across our region so we can develop a network of well signed coach paths that connect our towns, cities and tourist locations and are suitable for coaches.



Local Economy & Tourism

The demand for coach has changed over time with a growth in the touring and international market and more travellers looking for a more premium package.

The peninsula region offers a range of attractions as well as a beautiful natural environment that helps to draw visitors into the region. Better promotion of the region's offer to national and overseas coach operators could help to draw more visitors into the region, further boosting local economies.

One important action we can achieve together will be to increase the number of CPT **Coach Friendly Status** approved locations. To achieve approval several improvements for coach access, facilities and information are required. There are currently no CPT coach friendly locations in the Peninsula. Achieving this objective will attract more coaches and the economic benefits they bring.

We will work closely with the CPT and our partners to facilitate work that enables towns, cities, and defined locations to be awarded **Coach Friendly Status**.

Working together through the checklist approach to achieving this status will ensure that coach travel is made easier through improved facilities, signage and information – elevating coach and linking with our other activities to better promote coach and the region through positive marketing, information, and improved navigation.

With every coach passenger adding nearly **£20 per daily coach trip** to our local economies, we know there is significant value to this work.

Green Transport

Finally, a key benefit of coach travel is that it provides passengers with alternative mode of long distance, sustainable travel - but more can be done to showcase the role that coach has with delivering net zero objectives.

Like other transport industries there are some challenges facing the coach industry in terms of its route to decarbonisation (e.g. refuelling and charging infrastructure). As a regional body that works across different modes and sectors, Peninsula Transport is in a unique position to help align the coach industry and other modes with a regional decarbonisation approach. Linking the Coach Action Plan to our emerging work around an EV Strategy will be critical.

Coach can also complement other industries, such as freight, and can provide capacity for movements of small consignments across the region.

Building on the success of carrying parcels on coaches between Bristol and Plymouth, we will work with a range of partners to expand the concept of **greener freight** across the region using unspent coach capacity.

We will also align the Coach Action Plan with our emerging EV Strategy and facilitate work to increase **charging capacity** across the region.



Our Coach Action Plan

Table 3 outlines the full list of proposed actions that form our wider Coach Action Plan for the region. It highlights our role in delivering each action using the roles defined earlier for Peninsula Transport: **Researcher**; **Facilitator**; and **Influencer**.

Table 3 indicates the proposed timescales to achieve each action with the plan phased over a short-, medium- and long-term basis with early actions in the first two-years designed to set the path for continual improvement over the following eight to ten years.

The potential costs associated with the delivery of each action within the plan are also set out in Table 3 at a high-level: the plan indicating low costs (£), mid-range costs (££), and likely high costs (£££) as perceived at this stage.

Critical Early Actions

It is important for any action plan to gain early momentum – setting the tone for more ambitions and longer-term plans.

However, at an early stage there is also the opportunity to realise ‘quick wins’ and make simple improvements that can have a large positive and ongoing impact.

The following early actions are seen as critical to the successful delivery of the Peninsula Coach Action Plan:

1. Establish the virtual **Peninsula Coach Forum**.
2. Research and gather all coach information across the Peninsula into one place – the **Coach Information Portal**.
3. Using the CPT’s Coach Friendly Status approach, identify up to three places that can be made ‘**Coach Friendly**’ by summer 2025.

Monitoring and Evaluation

The actions identified as part of the Peninsula Coach Action Plan will be monitored each quarter through the **Peninsula Coach Forum**.

Progress against the plan and its agreed actions will be made available to all partners and public announcements about the plan’s delivery will be coordinated with wider outward facing progress reporting for Peninsula Transport.

Each action will be delivered through an agreed programme. These programmes will be developed by working groups linked to the **Peninsula Coach Forum** and will include milestones, required resources and planned outcomes. Monthly reporting will identify achievements as well as planned forward work, risks, costs, and potential barriers. Review of these reports will help lessons to be learnt and challenges to be overcome in real-time and will provide an evidence trail of programme delivery.

Approaching individual actions, and the wider Peninsula Coach Action Plan performance monitoring in this way will provide an opportunity to evaluate the success of each action, identify follow up actions, learn lessons that can be applied for future activities, and will ensure we continue to deliver the vision for coach across peninsula region.

The Coach Action Plan



| Theme | Action | Our Role | Short (0-2 Years) | Medium (up to 5 Years) | Long (up to 10 Years) | Cost |
|-----------------------------------|---|--------------------|-------------------------|------------------------------|-----------------------------|------|
| Marketing & Engagement | Work with operators to understand how the STB can support with marketing and promoting coach as a mode, including service availability, service changes, facilities and wider work that this industry is doing ' Coaches Welcome ' campaign. | Facilitator | | | | ££ |
| Marketing & Engagement | Introduce a Peninsula Coach Forum to bring together key stakeholders, including scheduled coach operators, local operators, member LTA's and tourism boards to deliver the action plans vision, objective and actions. | Facilitator | | | | £ |
| Marketing & Engagement | Support with including coach operators in planning discussions to maximise the benefits from new and improved structures for all. | Facilitator | | | | £ |
| Marketing & Engagement | Explore opportunities to promote the value of coach to region to central government, local leaders and influencers, and potential future funder for funding opportunities. | Influence | | | | £ |
| Marketing & Engagement | Carry out an online coach perception survey to better understand strengths and barriers to coach travel from a passenger / public perspective. | Researcher | | | | £ |
| Marketing & Engagement | Work closely with partners and coach operators to level the regional EP playing field for coach, removing coach but allowing local services. | Influence | | | | £ |

| Theme | Action | Our Role | Short (0-2 Years) | Medium (up to 5 Years) | Long (up to 10 Years) | Cost |
|-------------------------------------|---|--------------------|-------------------------|------------------------------|-----------------------------|----------------|
| Public Transport Integration | Review the current public transport network in the region and understand current gaps and the role of coach, and other modes, in filling these gaps – potentially creating a Strategic Coach Network . | Researcher | | | | ££ |
| Public Transport Integration | Work with scheduled express coach operators to understand future opportunities for an improved regional and national network and we can jointly promote these travel options with them. | Facilitator | | | | £ or ££ |
| Public Transport Integration | Understand how coach can be included in / make better use of interchange hubs (e.g. St Erth) to improve passenger access, connected travel across our regional networks, and safety. | Researcher | | | | ££ |
| Public Transport Integration | Explore opportunities to align coach work with our Rural Mobility pilot work to provide more residents and visitors with access to the coach network through first and last mile connectivity. | Researcher | | | | £ |
| Public Transport Integration | Explore opportunities to integrate coach ticketing with other modes of transport as part of our wider goal around integrated ticketing – coach included in the ‘one bus one ticket’ approach with rail. | Influencer | | | | ££ |
| Public Transport Integration | Explore opportunities to align freight and coach workstreams to use spare capacity on the coach network to move freight between key destinations, as now in operation between Plymouth and Bristol. | Researcher | | | | £ |

| Theme | Action | Our Role | Short (0-2 Years) | Medium (up to 5 Years) | Long (up to 10 Years) | Cost |
|---------------------------------|--|--------------------|-------------------------|------------------------------|-----------------------------|------|
| Network & Operations | Improve and set out the communication process for changes to our scheduled express services to, across, and out of our region. | Facilitator | | | | £ |
| Network & Operations | Audit coach parking and facilities and make information available to coach operators through one single source that is easily shared and updated – the Coach Information Portal . | Researcher | | | | £ |
| Network & Operations | Work with industry partners to promote the recruitment of new drivers as well as find solutions to driver shortages. | Facilitator | | | | £ |
| Network & Operations | Carry out a detailed analysis of how local, national and international coaches move around and interact with the region to better understand how facilities can be improved for coaches / passengers. | Researcher | | | | ££ |
| Network & Operations | Support coach operators and member LTAs working together to ensure coach parking is accessible and inclusive for all, including suitable space for disabled access and right-hand boarding and alighting for international (Right-hand Drive) coaches. | Facilitator | | | | £ |
| Highway Management | Work with partners to produce and interactive and accessible map showing road widths, height restrictions, sharp bends, coach facilities, and ideal coach routes across the Peninsula region. | Facilitator | | | | ££ |
| Highway Management | Promote the use of sustainable travel, and the different modes available, to visiting tourists during the summer months to reduce congestion on our strategic and local road network. | Facilitator | | | | £ |

| Theme | Action | Our Role | Short (0-2 Years) | Medium (up to 5 Years) | Long (up to 10 Years) | Cost |
|------------------------------------|--|--------------------|-------------------------|------------------------------|-----------------------------|------|
| Highway Management | Engage with member LTAs to understand how traffic management may change in their area and communicate this with coach operators, with an opportunity to explore how coach operators can be involved with the planning process around traffic management changes. | Facilitator | | | | £ |
| Highway Management | Research and understand where the hotspots of hard-to-reach areas are located and develop a signage and safe route strategy for each. | Researcher | | | | ££ |
| Local Economy & Tourism | Promote coach and its benefits as an alternative mode for longer distance journeys to passengers to raise awareness of coach offer. | Facilitator | | | | £ |
| Local Economy & Tourism | Promote the south west peninsula as a region for visiting holiday and touring operators as a place to visit and enjoy – ‘ Coaches Welcome ’. | Facilitator | | | | £ |
| Local Economy & Tourism | Promote the value of coach tourism to local businesses to highlight potential economic benefit. | Facilitator | | | | £ |
| Local Economy & Tourism | Increase the number of CPT accredited Coach Friendly Status sites by 2-5 per year, helping to address challenges around infrastructure, information, wayfinding, quality and access. | Researcher | | | | £ |

| Theme | Action | Our Role | Short (0-2 Years) | Medium (up to 5 Years) | Long (up to 10 Years) | Cost |
|---------------------|--|--------------------|-------------------------|------------------------------|-----------------------------|------|
| Green Travel | Promote coach as a sustainable way of travelling to and through the region. | Facilitator | | | | £ |
| Green Travel | Explore opportunities to align decarbonisation of coach with other modes, such as bus and freight and integrate freight onto the coach network – parcels as passengers . | Researcher | | | | ££ |
| Green Travel | Explore opportunity for to develop the region and into a sustainable tourist destination and promote this to residents, tourists and operators. | Researcher | | | | £ |
| Green Travel | Align Peninsula Transport's EV Strategy with the Coach Action Plan and work across the strategies to increase charging opportunities (Electric) and refuelling opportunities (hydrogen) for coach. | Influencer | | | | £ |

Document References

In the preparation of our Coach Action Plan, the following documents have been used:

[Peninsula Transport Strategy: Strategic Transport Priorities to 2050](#), Peninsula Transport, 2024.

[The Economic Impact of Coach Services](#), CPT 2024.

[Backing Britain's Coaches](#), CPT 2021

[Bus and Coach Plan](#), National Highways, 2023.

[Logistics and Coach Survey: Strategic Roads 2022-23](#), Transport Focus, 2024.

[Peninsula Transport: South West Freight Strategy](#), AECOM/WSP 2022.





**Peninsula
Transport**

Transforming the economic performance of the South West