

Body:	Scrutiny Committee
Date:	27 th September 2006
Subject:	Coach Tourism
Report Of:	Coach Scrutiny Task Group
Ward(s)	All
Purpose	To inform Scrutiny Committee on the outcome of a review into the value of coach tourism.
Decision Type:	Not applicable
Recommendation:	<p>That the scrutiny committee is asked to comment on the report and support the recommendations of the Task Group which are:</p> <ul style="list-style-type: none">(a) That coach tourism continues to maintain its market share(b) That coach tourism has a sustainable future and will continue to generate income to Eastbourne's economy(c) That the marketing strategy for the town will commit to the industry whilst developing new markets for the future(d) Further discussion with coach companies needs to take place to establish their aspirations with regard to the facilities that will be available at Eastbourne Buses. This discussion needs to take place with local companies as well as national companies. This recommendation needs to be passed to the Coach & Lorry Park Working Party to ascertain what research has been undertaken already.
Contact:	Annie Wills, Tourism Manager – Economy Tourism & Planning, Telephone 01323 415410 or internally on extension 5410. E-mail address: annie.wills@eastbourne.gov.uk

1.0 Introduction

1.1 Scrutiny Committee at its meeting on the 13th October 2005 agreed that this review should focus on the value of coach tourism and that the Scrutiny Board should decide on the scope and purpose of the review.

1.2 At its first meeting the Scrutiny Board consisting of Councillor Barry Taylor (Chairman) and Councillor Mrs Irene Sims agreed the scope of the review:

- Usage of Eastbourne by coach companies and hotels
- Eastbourne Buses – use of facilities by coach companies
- Research into the potential increase in coaching tourism
- Facilities required by coach users and drivers
- Ways of increasing the Tourism spend in Eastbourne

1.3 A programme of review was agreed which would include:

- Volume and Value
- Parking
- Current and future markets
- Facilities for the future
- Stakeholders questions
- Consultation list of selected coach companies and hoteliers

1.4 Conversely the members were advised that a year long survey namely the strategic intentions of coach tour operators, had been undertaken by the University of Brighton and Eastbourne Borough Council. This comprehensive research included face to face interviews with Managing Directors of key coach companies, including Shearings and Wallace Arnold. (now merged as one company)

2.0 The Review

2.1 As part of the review, research was undertaken to establish the priorities for coach drivers. As part of this research a comparison study was undertaken to compare the coach park facilities provided at Eastbourne with competing destinations. The research established the following key points:

- Provision more important than the location
- Manned access points, i.e. organised collection point for passengers. (Eastbourne has a Coach Co-ordinator at the Pier head during busy times.)
- Coach drivers vote with their feet, i.e. if they are not happy they will tell everyone and lobby their operator not to come to Eastbourne
- Eastbourne has the second most expensive coach park
- Newquay's coach park is the most expensive with the least facilities
- Price and facilities of each destination depends on the destination's reliance on coach tourism

The full details of the survey are attached as **Appendix 1**

Alongside this the issue was raised with regard to Eastbourne Buses and their proposed opening times. It was felt that Eastbourne Buses should be open for 24 hours; the current plan indicates that the depot will be closed for two hours. (2.00am – 4.00am)

2.2 Further research was undertaken to establish the changes in the trends of coach tourism, along with the reliance on the industry. Research carried out established the following information:

- Coach travel is the second highest mode of transport after the car
- Less than 40% of the hotels in Eastbourne are large enough to accommodate a coach
- Only 24% of visitors stay for seven days
- There are 1040 coach operators in the UK – 93% use or have used Eastbourne

Attached as **Appendix 2** is the table of hotels showing the number and level of reliance on coach tourism

A further issue that needs to be addressed is with regard to the transportation of students to host families and host families' needs for parking, when collecting students.

The volume of coaching could increase with the development of the National Park. It is envisaged that with National Park status additional marketing opportunities will arise.

Furthermore there may be an increase in coach tourism as a result of the introduction of civil parking.

2.3 Additional research was completed to confirm the number of hotels that have changed or closed over the past 10 years, key points from this survey are listed below:

- 8 hotels have changed their names but have continued to rely on coach tourism
- 496 bedrooms have been lost through the closure of coaching hotels
- 12 hotels rely totally on coaches
- None of the 12 hotels are graded, i.e. not starred accommodation
- Only 5 of the 12 advertise in the Eastbourne guide

Attached as *Appendix 3* is the table of hotels, either changed or closed.

3.0 Consultation

3.1 A list of questions and suggested stakeholder attendees was prepared for the Scrutiny Board.

3.2 The Board decided on the list and the stakeholders were sent the questions and invited to attend the Scrutiny Task Group at agreed times. The list of attendees is attached as *Appendix 4*.

3.3 Two dates were agreed for the interviews to take place, Monday 3rd April and Friday 21st July. The list of questions asked is attached as *Appendix 5*

4. The Outcome of Consultation

4.1 A summary of the interviews is attached as *Appendix 6*

5.0 Resource Implications

5.1 Financial
There are no financial implications arising from this Scrutiny Review.

5.2 Staffing
There are no staffing implications arising from the outcome of this review.

6.0 Environmental and Community Safety Implication

6.1 There are no implications from this review

7.0 Conclusion

- 7.1 The Scrutiny Board has undertaken this review on the basis of establishing the value of coach tourism. The research undertaken has explored reliance on this industry whilst trying to ascertain the long term aspirations of coaching hotels. Key points from interviews and research are listed below:
- Most hotel owners work to a five year vision and no further ahead
 - Overall the expectation is that the market will continue
 - Whilst the market will continue, it will demand more, interestingly enough the hotels think that EBC should provide more
 - Hoteliers are reluctant to invest strategically or financially to strengthen their position and keep their share of the market. i.e meeting the higher expectations of coach travellers, ensuite rooms, themed breaks
- 7.2 Research has confirmed that coach tourism is becoming more discerning and with this in mind, the tourism development unit are in the process of re-writing the group travel website to reflect this need. The group travel website will be more price led and itinerary based. Alongside this short breaks and themed breaks will be included.
- 7.3 Through the EHA, coaching hotels will be encouraged to understand the expectation of the future market and amend their offer accordingly
- 7.4 The Scrutiny Board therefore recommends Scrutiny Committee to agree that the value coaching tourism adds to the economy is sustainable and that Eastbourne Borough Council continues to facilitate the offer, whilst developing a longer term marketing strategy to ensure the sustainability of the prominent hotels that rely on this market segment.

Sarah Lamy Assistant Director –Economy Tourism & Planning

Background Papers:

The Background Papers used in compiling this report were as follows:

Strategic Intentions of Coach Tour Operators – *University of Brighton Coastal Tourism Research Unit*

Cambridge Model Tourism Statistics – *Tourism South East*

To inspect or obtain copies of background papers please refer to the contact officer listed above.