



Tourist Coach Action Plan

2013

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Transport for London

Foreword

London's road network is the backbone of our transport system, supporting 80 per cent of passenger journeys and more than 90 per cent of freight movements in the Capital.

As Managing Director of Surface Transport, I'm aware of the important role coaches play in the transport system as well as in the economy and tourist trade in London. I'm also aware of the challenges the industry faces and how these may only get greater without continued action.

Looking ahead, the Capital's population will increase and there will be higher expectations for reliable and safe roads, enhanced public space as well as the efficient delivery of goods and services.

The Mayor's Roads Task Force (RTF) report, published in July 2013, marked the beginning of a new chapter in the history of London's roads and streets.



Leon Daniels

Managing Director
of Surface Transport,
TfL

Work is already under way to deliver the commitments outlined in Transport for London's (TfL's) response to the RTF, including the need to develop and adopt a new 'street family type' classification for London's streets. This will provide a framework for deciding how roads and streets should be designed, managed and operated, depending on the functions they need to perform.

This Tourist Coach Action Plan is being taken forward jointly by TfL and the Confederation of Passenger Transport (CPT). It sets out clearly, achievable actions over the next five years that will ensure: better access to tourist coaches; more flexible/smarter use of stopping and parking space; improved perception

of coaches and a more robust approach to discussing the challenges and opportunities for coaches in the Capital.

TfL works closely with the coach industry, London boroughs and other key stakeholders to address the issues above as effectively as possible. This is a key part of this action plan. It is, therefore, vital that all partners continue to work collaboratively to achieve the actions over the coming years.



Leon Daniels
Managing Director of Surface Transport, TfL



Foreword



Simon Posner
Chief Executive,
Confederation of
Passenger Transport

Over the past 12 months CPT, the industry's trade association, has been working closely with many of the organisations that directly influence and govern UK's coaching industry. Here in London we have worked in partnership with TfL to develop the Capital's very first Tourist Coach Action Plan. This five-year plan, which outlines many ongoing issues affecting the operation of coaches in the Capital, clearly sets out the actions and responsibilities for those people who are making sure the coach is always recognised and suitably accommodated.

CPT and TfL cannot resolve all day-to-day issues by themselves. They rely instead on the industry, and in particular its drivers, to play a part too. Paying for the use of facilities, adhering to rules and regulations, not overstaying allowed times on bays and not annoying local residents by engine

idling are all things that must be done to further support our case.

In order to deliver the actions set out in this plan, it is important to ensure we have the active involvement of other key stakeholders; such as the boroughs and the tourism sector, to work with the industry alongside the CPT and TfL.

The Tourist Coach Action Plan is the first step on a bigger journey and one thing's for sure, we will not let the coach be forgotten.

A handwritten signature in black ink, appearing to read 'S. Posner', written in a cursive style.

Simon Posner
Chief Executive,
Confederation of Passenger Transport UK

Introduction

The tourist coach industry plays an important part in London's transport system, providing safe and accessible travel at a relatively low cost.

The sector accounts for around one-third of all coach journeys in the Capital and is a valuable contributor to London's economy.

Issues confronting the tourist coach industry in London are becoming more challenging, particularly:

- The expected rise in population over the coming years – potentially leading to higher numbers of road users and congestion
- The greater desire for enhanced and redistributed road and public space to other users including pedestrians and cyclists

Both of these challenges are likely to have an impact on the availability of facilities for coaches in London.

TfL and CPT need to continue to work with other key stakeholders such as the boroughs and the tourism industry to ensure tourist coaches can operate as efficiently as possible in London.

This action plan builds on the TfL Coach Strategy, which addresses the needs of all coach services in London. The plan defines and addresses the key challenges affecting tourist coaches in the Capital – and associated actions – over the coming years. It particularly focuses on tourist coaches as passengers now have a diverse range of needs across London,

some of which can often get overlooked in the development of major infrastructure and transport schemes.

TfL's role is to represent the interests of visitors to London travelling by coach, as well as ensuring coaches in the Capital have a minimal impact on the Transport for London Road Network (TLRN) and the wider road network. By working in partnership, the benefits of the tourist coach industry can be maximised while any negative impacts on the road network associated with coach travel can be reduced.

The plan highlights what has already been achieved and outlines how we will work with our key stakeholders.

Actions will be carried out and monitored by members of the London Tourist Coach Forum. This London-wide body brings together representatives of local and national government, the tourism and coach industries as well as other interested parties, to discuss matters relating to tourist coach operations in London.

Coaches in London: An overview

Coach travel has long provided an important component to transport and tourism in London.

It offers a dedicated, almost door-to-door service, at a relatively low-cost. One of its strengths has always been the ability to take people exactly where they want to go. And this is particularly important for mobility impaired people, older people, school children and tourists travelling in groups.

Three main types of coach services operate in London:

- **Scheduled domestic coach services**

Regular, high-frequency routes, between London and other destinations around the country. The majority operate from termini in the Victoria area and are typically used for commuting, airport and long distance travel purposes

- **Tourist coaches**

Catering for group visits to theatres, museums, hotels and other attractions, including bespoke private hire and charter services. These are typically used for leisure journeys

- **International coach services**

Services originating from mainland Europe. These are predominantly private hire/charter (tourist coach) although they also include some scheduled services. These are typically used for leisure and long distance journey purposes

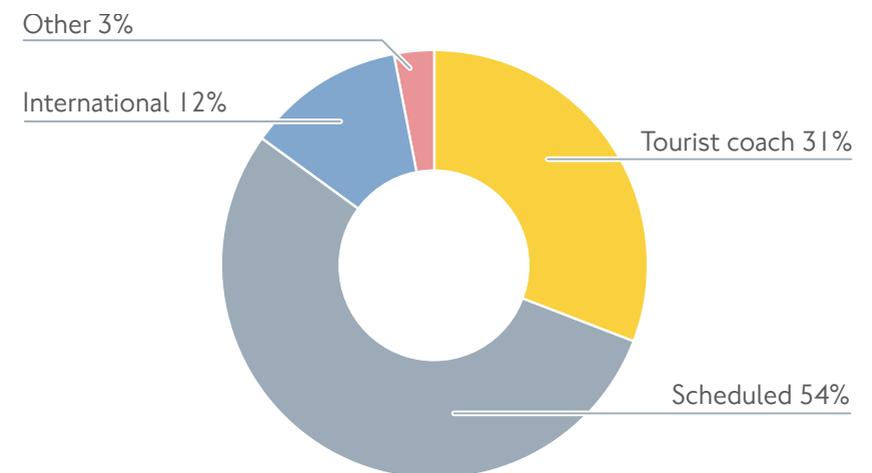
Over the past few years, there has been an upward trend in coaches entering and leaving central London. On average, this equates to around 3,000 coach movements every day. This plan

focuses on the tourist coach sector which, as shown in Figure 1, accounts for around one-third of these movements.

Tourist coach passenger needs are very diverse and drivers can

often be transporting people to different destinations across London every day. Facilities to pick up and set down passengers and park are therefore extremely important for the coach industry.

Figure 1: Volume of coach movements, by coach service type in London (2004 – 2011)



Seasonality

There are significant seasonal variations within the tourist coach sector where demand is driven mainly by leisure, school and holiday trips. Demand is generally greater during the spring and summer months, which in turn puts pressure on the availability of parking spaces and areas to pick up and set down passengers.

Coach facilities in London

It is essential for coaches to have suitable and adequate locations to pick up and set down passengers. Parking facilities are also required so drivers can take legally required breaks. There are many different types of coach facilities in London, as summarised in Table 1.

Across Greater London, there are around 590 dedicated coach

facilities including PUSD, short, medium and long-stay parking. These are typically, although not solely, used by the tourist coach sector.

A high proportion of the coach facilities are concentrated within central London, where most coach activity takes place (see Figure 2, p14). These facilities are important to the coach industry owing to their proximity to major tourist attractions, hotels, theatres and other destinations.

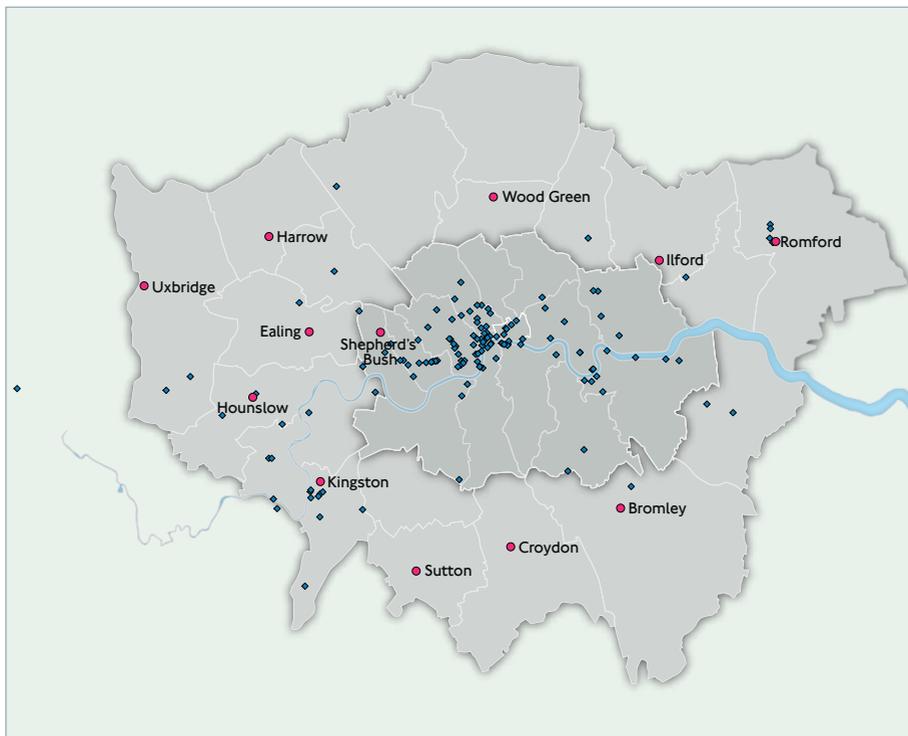
Across London coach facilities have increased, for example the introduction of coach parking in bus garages in 2011. However, they may not always be in the areas of high demand.

Table 1: Definition of coach facilities in London

Type	Description
Pick up and set down (PUSD) – on red routes	Coaches are allowed to stop at certain locations while passengers are boarding or alighting. These sites include dedicated facilities and red route bus stops where the sign plate indicates 'Except Buses' ¹ .
PUSD – on yellow lines	Coaches are allowed to set down and pick up passengers on single and double yellow lines. Some highway authorities allow up to 10 minutes waiting time when no loading restrictions are in operation. Where bus stop sign plate indicates 'Except Local Buses', tourist coaches are not permitted to stop.
Short-stay parking	Mostly dedicated on-street facilities – maximum stay of 20 to 30 minutes depending on location. Charges apply in some cases.
Medium-stay parking	Mostly on-street – maximum stay of one to four hours, though a few locations permit up to 12 hours. A charge applies to the majority of these dedicated facilities. Overnight parking is not generally permitted.
Long-stay parking	Off street coach parks – generally independently run on private land. Twenty-four hour parking is commonly provided, though the maximum stay period is at the owner's discretion. These sites often provide extra driver facilities, such as toilets.
Coach stations	Coach stations in central London (including Victoria Coach Station) are important passenger interchange points for tour companies operating excursions around London and to UK destinations.

¹ Vehicles of more than eight seats plus driver and therefore any restriction exempting 'buses' can be used by such a vehicle, including bus lanes.

Figure 2: Dedicated coach facilities in London



Based on the number of locations rather than the number of individual facilities

Table 2: Current on-street coach PUSD and parking facilities in central London, by borough

Borough	Type of bay			Total	% on TLRN
	PUSD	Short stay	Medium stay		
Westminster	16	14	80	110	69
City of London	0	2	18	20	10
Camden	1	7	15	23	4
Kensington & Chelsea	3	12	1	16	100
Lambeth	8	7	7	22	32
Southwark	0	12	11	23	22
Hammersmith & Fulham	0	0	0	0	0
Wandsworth	0	0	0	0	0
Total	28	54	132	214	44

Based on 2013 coach parking map

There are 214 on-street facilities within the central London boroughs (as defined in Table 2). Of these, 44 per cent are located on the Transport for London Road Network (also known as TLRN or red routes), although all

revenue from coach parking on the TLRN is kept by boroughs.

There are more than 100 further spaces in long-stay coach parking in the central London area, including New Covent

Garden Market, Bayswater Road and Tower Hill. There are an additional 90 spaces which are within easy reach, including those at The O2 and West Ham bus garage.

Expected future demand in the coach market

Retired people represent one of the core markets for coach tourism in London, particularly those coming from the surrounding regions. With the number of people aged 65 and over in the UK projected to increase from 10.3 million in 2010 to 12.7 million in 2018, and 16.9 million by 2035², demand for coach travel into the Capital is expected to carry on growing.

For London, the latest Census

2. Office of National Statistics (ONS) 2010-based UK population projections

projections show that the population is growing faster than previously thought and will reach 10 million by 2031. Therefore, efficient use of existing facilities will be vital to ensure the industry can cater for this likely increase in passengers.

Modern coach travel is well placed to meet this market demand, providing a much-improved experience for passengers. Operators comply with the Low Emission Zone (LEZ) in London and leading operators are investing in state-of-the-art vehicles that have the latest internet access, refreshment facilities, wheelchair access, video systems and comfortable seating.

Case study

Free coach parking at The O2

The O2 provides parking for up to 67 coaches, 24 hours a day, with driver facilities including electrical hook up and water supply for vehicle wash downs. It also offers a free parking option for group visits to on-site attractions. For example, free coach parking is

offered if groups pre-book 20 or more people on the Thames Clippers Park and Glide option.

This provides drivers with safe and secure parking as well as facilities to wait, removing the need to drive into central London.



Challenges facing the tourist coach industry

While demand for coach travel is expected to increase over the coming years, a number of issues must be tackled to help the industry meet customer needs and minimise the impact of its operations on other road users.

The challenges outlined below, and associated actions in the next section, have been identified through discussions with borough, coach and tourism representatives. These are summarised under three key themes below:

- Providing better access for tourist coaches
 - Planning for new developments
 - Picking up and setting down
 - Managing parking

- Minimising the impact and improving efficiency of tourist coaches

- Better partnership working

In general, all parties agree that further research is required to strengthen the evidence base surrounding the key challenges.



Providing better access for tourist coaches

Planning for new developments

- In some cases, new developments that generate coach travel, such as hotel and shopping centres, do not provide suitable pick up and set down facilities for coaches. Often coach parking is seen as unprofitable and costly to incorporate into developments, owing to the access and associated infrastructure costs when offset against potential parking revenue

- The majority of long-stay coach parking (coach parks) is provided by private landowners. Some locations, such as New Covent Garden Market, are in areas of major infrastructure development and therefore under threat of being removed

- In recent years, there have been instances where existing parking has been lost or is planned to close as a result of re-development. For example, Warwick Road coach park

Picking up and setting down

- Picking up and setting down passengers can be difficult in London for a number of reasons:
 - Drivers overstaying at on-street facilities as they are not informed of available parking and are therefore reluctant to move on
 - The facilities are not managed or waiting periods are not adequately enforced
 - On-street facilities may not be near the destination. This is particularly a concern for drivers with older passengers and school groups. Group organisers and passengers also often have specific

expectations on where they should be dropped off and collected

– Inconsistencies between the observation periods for stopping on yellow lines across boroughs in London

– Reluctance of destinations, such as tourist attractions and hotels to manage the local impact of customers arriving and departing by coach

– Inconsistent approach in how coaches should pick up and set down passengers at destinations across the Capital

Case study

20-minute coach bays

The London Eye is a good example of efficient tourist coach operations. Merlin Entertainment Group marshals eight coach bays at the attraction on behalf of the London borough of Lambeth. The bays are free to use, although drivers must have a permit obtained from Merlin.

In 2012, around 11,000 coaches served the London Eye and

London Aquarium alone. At the busiest times, there can be up to 120 vehicles per day picking up and setting down passengers. However, congestion is minimal due to the effective way in which the facility is managed.

This example highlights how a relatively small kerbside space can be used and disruption to the wider road network can be minimised.



Managing parking

- At the busiest times of the year, demand for parking in some areas often outstrips supply. This can cause unnecessary congestion, impact on air quality and increase operator costs as drivers take time looking for a space to stop. It may also result in drivers stopping illegally
- Where groups are staying in the Capital for long periods of time, coaches need access to safe and secure off-street parking facilities. However, in some instances, drivers are still unaware of all parking locations in London, particularly for overnight stays

- In future, on-street parking may come under increased pressure as major transport schemes, taken forward by TfL or the boroughs, seek to redistribute highway space in favour of other uses

Minimising the impact and improving efficiency of tourist coaches

- Engine idling causes localised noise and air pollution that can lead to unnecessary conflict with local residents and businesses and negative perceptions of the industry
- Poor compliance by coach drivers with the rules of the road such as illegal parking and failure to obey traffic signs affect the coach industry and other road users

- London's road network is very busy and congestion is expected to increase as the Capital's population and employment continue to grow. At busy times, coaches often have issues negotiating junctions, particularly exiting yellow box junctions
- TfL and CPT recognise and share best practice across the coach industry. However, there would be benefits to expanding this across a wider range of local, national and international stakeholders

Better partnership working

- Many organisations have an interest in coach operations in the Capital. The London Coach Forum, which meets quarterly and is chaired by TfL, involves

stakeholders from boroughs, tour guide organisations and the coach industry. The forum has been in existence for more than seven years and promotes the development of the tourist coach market. The lack of decision makers from key stakeholder organisations has, however, resulted in diminished effectiveness of the forum. Further engagement with key decision makers in GLA, local authorities and the tourism industry is therefore required to drive the actions in this document forward and increase the promotion of best practice

The actions

TfL, in conjunction with CPT, the London boroughs and other key stakeholders, has identified a series of actions that will help the industry overcome the challenges described in the previous section.

All partners need to work together to ensure the actions are completed, as no single organisation or sector will be able to resolve the issues in isolation.

These high-level actions, which are scheduled to be completed over the next five years, have been grouped into three themes. Each has a clear vision of what it is trying to achieve over the course of this plan.

Providing better access for tourist coaches

- Planning for new developments
 - Greater influence over developers and private land owners through the planning process, to ensure the provision of appropriate coach facilities

- Strengthening the planning policies to support requirements of coaches in the London Plan and other supplementary planning documents

- Picking up and setting down passengers efficiently
 - Flexible and more efficient use of kerbside space
 - Appropriate facilities that reflect local characteristics
 - Use of smarter systems and techniques for managing short-term, on-street facilities
- Managing parking
 - Better data-led approach to discussing parking challenges

- Greater awareness of available parking options
- Use of smarter technology for managing on-street parking facilities

Minimising the impacts and improving efficiency of tourist coaches

- Drivers who are well informed on the rules of the road in London
- Improving the perception of coaches through the sharing and promotion of best practice
- More efficient operations to save operators money, reduce congestion and minimise negative environmental impact

Better partnership working

- Wider acknowledgment and involvement of organisations that impact on or are impacted by coach tourism in London

Monitoring of the action plan

The progress on the plan's implementation will be overseen by the London Tourist Coach Forum and the actions will be monitored and taken forward by regular programme meetings.

Outline of the actions

Providing better access for tourist coaches

Planning policy for new developments

Related challenges	Actions
Consideration of coaches in planning process	<p>1. During 2013/14, TfL, the Greater London Authority (GLA) and the CPT will review the GLA planning guidance for new developments that generate coach activity, such as tourist attractions, hotels, swimming pools, schools and other locations</p> <ul style="list-style-type: none"> – TfL, GLA and partners will review future GLA planning guidance to ensure appropriate standards on coach parking and provision are included <p>2. TfL, CPT and boroughs will work together to review coach parking standards within the London Plan by spring 2014</p> <ul style="list-style-type: none"> – Working with the GLA, CPT and boroughs, TfL will aim to adopt stronger coach parking provision within the London Plan by 2015/16 <p>3. During 2014, CPT will review local planning frameworks and policies to determine the level of support for coaches</p> <ul style="list-style-type: none"> – Where the CPT believes support is insufficient, it will seek to work with the relevant borough to improve the policies in line with the parking standards

Picking up and setting down passengers efficiently

Related challenges	Actions
<p>Drivers over-staying and/or misusing bays</p> <p>Dedicated facilities not in the right location</p>	<p>4. By autumn 2013, TfL, working with London boroughs and the CPT, will establish a priority list of problematic pick up and set down locations, such as hotels and museums</p> <ul style="list-style-type: none"> – Each year, all partners will review up to 10 locations and identify areas for improvement <p>5. During 2014/15, TfL will work with partners on a joint basis to pilot a marshalling system at a maximum of three key coach destination locations to ensure more effective management of bays</p>
Passenger and group organiser expectations	<p>6. By spring 2014, TfL and the CPT will develop guidance for tour guides and tour group organisers on coach operations in London. The guidance will inform drivers of where they can and cannot stop, and offer advice on coordinating pick-up and set-down between passengers and the driver. This guidance will be available online and as a leaflet</p>
Consistency in parking policy	<p>7. While recognising that ultimately parking policy decisions are governed by local priorities, TfL will engage with all central London boroughs and London Councils to encourage consistent approaches to coach parking policy. Specifically, the waiting period for stopping on borough roads, ie single and double yellow lines, by spring 2014</p> <ul style="list-style-type: none"> – By spring 2015, TfL and the CPT will seek to gain a joint memorandum of understanding to provide a consistent waiting period across boroughs

Related challenges	Actions
Availability of facilities	<p>8. TfL, working with CPT, will investigate the use of kerbside technology for pick up and set down bays on red routes to allow spaces to be booked online in advance</p> <ul style="list-style-type: none"> – TfL will seek to develop a pilot system to test specific locations across London <p>9. During 2014 TfL, CPT and boroughs will identify a minimum of three sites where mixed-use bays can be trialled</p> <ul style="list-style-type: none"> – Sites will be trialled during 2014/15 and monitored to identify the effectiveness of kerb space utilisation

Managing parking

Related challenges	Actions
Lack of data about usage of parking facilities	<p>10. By summer 2014, TfL will complete a programme of coach bay usage surveys to supplement the Central London Coach Survey</p> <ul style="list-style-type: none"> – The findings will be used to identify demand for the facilities and inform discussions on the availability of coach parking in central London <p>11. TfL, CPT and European Tour Operators Association (ETOA) will carry out research into the specific needs of coach passengers. The intention is to review whether different types of PUSD and parking solutions could align with specific types of passengers</p> <ul style="list-style-type: none"> – The results will be presented to the London Coach Forum by autumn 2014
Drivers unaware of parking facility locations	<p>12. TfL and the CPT will develop local area parking maps to improve the provision of information for drivers</p> <ul style="list-style-type: none"> – Detailed location specific maps tackling key parking problems will be delivered as part of the 2014 London coach parking map <p>13. Intelligent traffic systems and management can help reduce the time spent driving around London for parking spaces</p> <ul style="list-style-type: none"> – TfL and the CPT will work with and encourage boroughs to investigate the use of dynamic (real-time) parking technology for coach parking by spring 2015

Related challenges	Actions
Pressure on existing facilities	<p>14. During 2014/15, TfL will undertake a feasibility study on the provision of a central London strategic coach parking site. This will identify opportunities and costs of providing a facility specifically for tourist coaches</p> <p>15. On an ongoing basis, TfL and the CPT will also engage with private coach park landowners to promote the importance of coach parks for the coach industry</p>
Availability of overnight facilities	<p>16. TfL and the CPT will investigate the use of bus stations for overnight parking for coaches by spring 2014</p>



Minimising the impact and improving efficiency of tourist coaches

Related challenges	Actions
Operator standards	<p>17. During 2013, TfL will complete a pilot of the Fleet Operator Recognition Scheme (FORS) to highlight benefits and ensure suitability of the scheme for the coach industry</p> <ul style="list-style-type: none"> – A workshop will take place by the end of 2013 to review the pilot and determine how FORS can be implemented throughout the coach industry – Actions from the workshop will be delivered by spring 2014 – TfL and the CPT will work together to develop and implement a campaign for promoting FORS to the coach industry during 2014/15, based on the findings
Driver behaviour and awareness	<p>18. As part of FORS, TfL has developed a coach driver training course on the rules and regulations of operating coaches in London. This aims to attract greater take up of FORS within the coach industry. TfL aims to train 500 drivers by spring 2014</p> <ul style="list-style-type: none"> – During 2014, TfL will monitor the effectiveness of driver training. This will look at the knowledge and behaviour of the drivers trained – If research suggests the training is beneficial, TfL will continue to fund further 500 driver spaces each year until 2018

Related challenges	Actions
Better and consistent approach to enforcement where it is most needed	<p>19. During 2014, TfL, the CPT and boroughs will review all short-term, on-street facilities to ensure the traffic regulations are correct and that they allow for enforcement to take place. Where problems are identified, TfL, working with boroughs, will seek to implement solutions during 2014/15</p> <p>20. TfL, CPT and boroughs will identify locations across London where antisocial driver behaviour is having a significant problem</p> <ul style="list-style-type: none"> – During 2014, targeted enforcement by traffic police will take place where disruption and greatest non-compliance occurs
Sharing best practice Engine idling	<p>21. During 2014, TfL, CPT and boroughs will undertake a study to identify the full costs of engine idling</p> <ul style="list-style-type: none"> – A campaign to promote the study will be developed by 2014 and promoted to the coach industry, tourism organisations and through the CPT and TfL website <p>22. All partner organisations will identify and promote best practice in the industry and to European partner organisations, local authorities and tour operator organisations</p>

Related challenges	Actions
Coach routing	<p>23. The London Coach Forum has established a priority list of problematic yellow box junction locations</p> <ul style="list-style-type: none"> – Each year, all partners will review up to 10 locations to identify possible solutions/improvements
Consistency at tourist destinations	<p>24. The CPT, TfL and boroughs will work with tourism organisations to identify and publicise consistent guidance for coach travel to destinations in London by autumn 2014</p>



Better partnership working

Related challenges	Actions
Engagement with key decision makers	<p>25. TfL, working with all the London Coach Forum members, will revise governance and membership by autumn</p> <p>– TfL and the CPT will organise an annual event to monitor the progress of the action plan and provide an opportunity to promote best practice across a broad network of organisations across London</p>
Broaden partnership working	<p>26. Working with the boroughs, CPT will identify less well known attractions and promote these locations to the coach industry by autumn 2014</p>

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