

**DCMS  
By Email**

Dear Duncan

Thank you for your time in taking a closer look at the coach tourism industry amidst the current situation. You will have already received a copy of the industry support letter from Tourism South East and a copy of the recent survey results we generated from our Group Travel Organiser members. This information reflects the importance of the sector to our region and to TSE as a DMO organisation.

In response to your e-mail. I hope the below information from Tourism South East, organisers of the national Excursions group travel exhibition, will highlight and feedback on the Government support areas that have been implemented, potential gaps and foreseeable issues that lay ahead.

**National exhibition data**

Research from the 2019 and 2020 Excursions exhibition indicates the following from tourism exhibitor businesses:

- 76% of businesses rated the coach and tour operators as very important
- On average the groups market represented 30% of tourism businesses
- On average 52% of tourism businesses had seen an increase in the groups market
- The average group size over this period had remained the same

The sustainable travel aspect of coach tourism has led many coach providers to make significant investment along these lines, this indicates a key growth area for the sector.

The above data and points are provided not just to highlight value, of which I know you are already very aware, but to demonstrate the longer-term viability given normal trading conditions

**Key Support**

Through these times, the tourism industry has navigated a particularly difficult road with regard to financial impacts. The unprecedented Government support has ensured that many tourism businesses will be able to weather this storm.

Anecdotally, we understand

from our partners that the furlough scheme and bounce back loans has been the fundamental support area that has sustained coach business through this time.

**Gaps in Support**

The Business Rates Relief Scheme to support retail, hospitality, and leisure business through the crisis, did not explicitly state that this relief was available to the coach industry. In the majorities of cases this led local authorities, despite the LGA guidance, to exclude the coach industry from funded support and rate relief.

It has also been highlighted that there are considerable similarities between the enclosed space of a coach interior and that of an aircraft or train, indeed many of our partner coach providers have invested in similar air filtration system. The coach industry however was very much bound by the rules around social distancing and 'rule of 6', therefore limiting capacity and income generation.

Further details on the travel trade businesses and feedback can be seen viewed here.

[https://zoom.us/webinar/register/rec/WN - t4r7XG2TLOJ7LPTvJLxag?meetingId=dBRJh9W8e9MDcm01KPNbUUuSijyeGDwP8fCUDfZ\\_EB\\_rxg3XpbjZ9XK5IUsP6GGC.gesEcOGj5dHncfoo&playId=&action=play&xzm\\_rtaid=fPfQ5\\_17QISSe6mMFV9-vQ.1606939583925.73c34f0a373091bcc1e6608902806a1&xzm\\_rhtaid=83](https://zoom.us/webinar/register/rec/WN-t4r7XG2TLOJ7LPTvJLxag?meetingId=dBRJh9W8e9MDcm01KPNbUUuSijyeGDwP8fCUDfZ_EB_rxg3XpbjZ9XK5IUsP6GGC.gesEcOGj5dHncfoo&playId=&action=play&xzm_rtaid=fPfQ5_17QISSe6mMFV9-vQ.1606939583925.73c34f0a373091bcc1e6608902806a1&xzm_rhtaid=83)

### **Identified issues going forward**

Due to the higher demographic ages of the group travellers, confidence and resilience of these groups will inevitably take longer to 'bounce back'. Our recent survey of the tourism businesses across the country, all of which had a percentage of their businesses targeting this market, also indicates that recovery may be slower than in other tourism sectors.

- 52% of businesses are currently focusing on leisure day trips rather than the groups markets
- 45% of businesses have had staff repositioned or been made redundant from the group travel team/department
- 77% of business have lost marketing budget from this market

I am grateful to both Kurt Janson of the Tourism Alliance and Helen ?? of the CTA for the representation of this important industry. Alongside these organisations, Tourism South East would be pleased to work with our partners to provide further information and support to this sector.

Yours sincerely



Fran Downton  
Chief Executive

Copy to: CPT, CTA