

Martin Schiefelbusch

The Coach on the Leisure Travel Market

A Comparison between Britain and Germany

Diploma Thesis

Bibliographic information published by the German National Library:

The German National Library lists this publication in the National Bibliography; detailed bibliographic data are available on the Internet at <http://dnb.dnb.de> .

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ISBN: 9783832418113

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A Comparison between Britain and Germany

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A Comparison between Britain and Germany

Diplomarbeit

University of Westminster, London, Großbritannien

Fachbereich MSc Transport Planning and Management

Prüfer Prof. P. R. White

Transport Studies Group

März 1998 Abgabe



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Schiefelbusch, Martin: The Coach on the Leisure Travel Market: A Comparison between Britain and Germany / Martin Schiefelbusch - Hamburg: Diplomarbeiten Agentur, 1999
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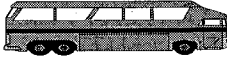
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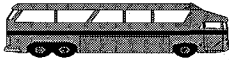
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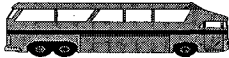
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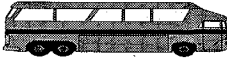


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1 Introduction

The provision and use of coach services is a topic which has found relatively little interest in transport planning and research so far. Although coaches can get significant shares of patronage or modal split - at least under certain conditions - they are not often considered as a separate mode of transport, both on the level of aggregate statistics and on the smaller scale of the "daily planning business".¹ In principle this applies to both Britain and Germany, although part of the British coach business received some attention in the early 80s when domestic scheduled services were deregulated.

In the author's interpretation, a comprehensive analysis of the role of coaches includes the operating environment, the supply of coach services, characteristics of demand and the relation to other modes of transport.

Operating environment has to be understood in a wider sense. Not only the direct transport-related parameters are of interest but also general elements of geography and social characteristics of the two nations as these impact on the demand for both transport and tourism in general. There is also an overlap to the supply of coach services themselves as politics had their influence on the industry - mainly through legislation, where major differences between the UK and Germany can be found. Hence deregulation of scheduled coach services in the UK is an important element of this analysis, although it is not intended to open up this area of research, which has been well covered elsewhere, again.

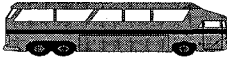
The role of coaches on the two transport markets is then analysed in two separate approaches. Firstly, a number of sources can be used to get an idea of the importance of this mode in quantitative terms. Lower car ownership and the more liberal regulatory environment in the UK seem to favour the coach compared to Germany and should lead to a greater share of the overall market.

Another way of looking at this question is to analyse the products offered by coach operators and the markets they operate from a functional point of view. The coach in itself is suitable for a large number of needs and therefore a closer look at this variety - and the differences between the two countries - is not only useful but necessary to get a complete understanding of this mode and also to interpret the results of market share analyses.

The wording of the title of this paper already indicates that this work is more focused on a macro- rather than a small-scale approach. Therefore the scope for own quantitative survey work was limited as this could only have covered a very small fraction of the overall picture. Some work has nevertheless been included in this paper to get a more thorough idea of the importance of coaches in a particular area where two case studies have been undertaken. It was intended originally to also include a pair of coach passenger surveys in the UK and Germany in order to get an idea of the structure of customers that allows comparisons on a like-to-like basis. However, external factors delayed the choice of an operator in the UK while its German counterpart had problems in achieving responses from its customers, so this had to be dropped. Consequently, analysis of the structure of coach users is limited to the relatively few external data available.

The title of this paper explicitly mentions the leisure travel market. All available evidence suggests, that the role of coaches on others is very small, so that the leisure market gives a good approximation of the coach business as a whole. There are of course some ex-

¹ except perhaps in those circumstances where they come in very large numbers, e.g. Eckschlager 1993, Intersofia 1997.



ceptions to this rule, e.g. commuter coaches in London and hire for conferences and similar events, which will be discussed briefly.

2 The Range of Coach Services

2.1 Definitions

Before any analysis is undertaken, it is essential to have a clear picture of the area of interest and to define the subject more closely. Hence this section tries to set up a common, "neutral" definition which covers as many variants of "products" on this market as possible.

It is useful to define these types of service at the outset in order to have definitions which stand above the terminology used in the individual countries, because this gives better possibilities for comparison. The "official" definitions will be explained in the next chapters and compared with those set up in the following.

It may seem straightforward to define coach services as an opposite to other, local or short distance bus operations, as is done for instance in the current UK licensing regulations (see 4.1.4.1.1). However, this leads to a number of transport services being included which arguably have more in common with local public transport, e.g. school and commuter contract services which are not open to the public. Hence some distance-based parameter would need to be included.

For the purpose of this paper, a coach service will be defined as a bus service which

1. operates over a distance of at least 30m/50km between termini, i.e. caters primarily for non-local traffic
2. has a wide spacing of stops (up to no stops en route) and hence high commercial speeds compared to local services
3. operates at low frequencies or totally irregular in terms of the number and timings of trips as well as regarding pre-determination of routes and hence usually requires pre-booking or at least the consultation of timetables
4. uses dedicated vehicles which can be distinguished from those for local services by various passenger comfort features, no standing spaces, usually high floor and large separated luggage spaces

In this context, "coach service" includes all types of trips run by coach operators (see next section), not only those which resemble a local bus service in terms of frequency, regularity and flexibility of routing.

These characteristics imply that coach services are not a means of transport which is used for most everyday trips, like shopping and commuting which form the greatest part of trip purposes on both local public transport and regional rail services. However, as will be discussed later, there are various situations where most, but not all of these criteria can be observed and hence coaches may be used for some forms of everyday mobility. Furthermore, use of vehicles for both coach and local bus services is a widespread practice at least among regional and smaller operators which has significant implications on the economics of such operations. Manufacturers have reacted to this by providing special "dual-purpose" ("Doppelverdiener") vehicles.



2.2 Types of Service

A more detailed look at the coach market has to take into account the large variety of "products" that fall into this definition of a coach service. There is substantial variation in all of the four characteristics mentioned above. Haul lengths can be up to thousands of kilometres, frequencies can vary between several departures per hour and entirely irregular and vehicles range from adapted minibuses to double deckers.

Although this is unlikely to cover all possible combinations adequately, a number of product or service types has been defined for the purpose of this paper. They are based on various sources, including patterns found in the industry, legal definitions and their implications for transport planning. These types are summarised briefly in table 2-1 and explained in more detail in the following paragraphs which list them in a sequence ordered by their similarity to traditional public transport services.

table 2-1: Coach service types

no	service type	operation period	typical frequency
1	scheduled all year	all year	1 or more/day
2	scheduled seasonal	season	1 or more/week
3	regular short tour (max 1 day)	at least season	1/week to 1/month
4	flexible stopover	all year or season	daily or several times per week
5	regular long tour (> 1 day)	at least season	1/week to 1/month
6	irregular tour	not known	longer or not known
7	private hire and charter	not known	longer or not known

- 1. scheduled all-year lines:** These can be described as similar to local bus services, but operating on longer distances. Many features of these apply also to the coach sector, like
 - operations according to published timetables,
 - fixed routes and stops,
 - general openness to the public,
 - some choice of fares including one-way trips.
- 2. scheduled seasonal lines:** These have the same characteristics as the first type with the addition that services are only offered for part of the year. They deserve mention as a separate category because of their relative importance for the industry, their different financial situation and because they can be tailored better to the needs of the leisure market and of certain passenger groups than all year services which must maintain some consistency in order to be attractive.
- 3. regular short (day) tours:** Frequencies on these can be similar to those offered on weaker scheduled services, i.e. offering departures from once every week or every two weeks up to daily. Compared to types 1 and 2, the main differences are:
 - usually services are designed to cater for demand from one catchment area to a destination without considering trips starting at the "destination" end of the journey; furthermore
 - it is not intended to provide for one-way trips or breaks of journey
 - operation follows commercial rules, i.e. public service obligations do not apply; in particular
 - there is no obligation to operate the tour if demand seems too low,
 - the number of stops is very limited, typically no stops to pick up/set down passengers are provided en route, hence
 - timetables and routes followed are much more flexible and can be adjusted to suit traffic conditions or passenger's wishes
 - the admission to attractions, guides or other special features can be included in the price