

Government Office for the South West

London to South West and South Wales

Multi Modal Study

Tourism Plan

Final Report

May 2002



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Contents Amendment Record

This report has been issued and amended as follows:

Issue	Revision	Description	Date	Signed
15	0	Tourism Plan – First draft for comment	Jan'02	CS
15	1	Tourism Plan – Final Draft report	April'02	CS
15	2	Tourism Plan – Final Report	May'02	CS

The Preferred Strategy will go to the Regional Assemblies for the South West and South East of England, and the Welsh Assembly Government, to consider their recommendations and as an input to the revision of the Regional Transport Strategies in Regional Planning Guidance for the South West and the South East.

These bodies will consider whether they wish to support the strategy. They will then, in turn, make recommendations to Ministers. Only then will any decisions be taken on the addition of schemes to investment programmes.

The study has been taken forward in an open and consultative manner and the possible options discussed publicly. Many of the proposals are at an early stage in the planning process and if the recommendations were accepted, further work would be required to prepare and consult on detailed designs and route alignments. This will allow specific impacts to be identified.

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Executive Summary: Tourism Plan

- E.1 Tourism contributes significantly to the economy of the South West accounting for 10% of employment and 10% of GDP. Patterns of travel associated with tourism activity in the South West region have a notable impact on the strategic transport network. Indeed, in some areas as many as 90% of visitors arrive by car. The mode choice made by tourists is therefore a key issue to be considered in the overall SWARMMS transport strategy.
- E.2 This plan considers the relationship between tourism and transport in the South West. It focuses on ways in which tourists could be encouraged to use alternatives to the private car. It considers ways in which public transport, walking and cycling can be made more attractive to tourists. The recommendations made aim to:
- Achieve modal shift for most of or part of the journeys made by visitors to the South West; and
 - Attract additional tourism trips by public transport.
- E.3 The plan focuses on measures that will encourage the use of more sustainable modes of transport both for longer distance trips into the South West and also for shorter trips from home and trips within the region.
- E.4 When implemented, the recommendations made by the Rural Access Plan will have benefits for tourist activity, making rural areas easier to access by means other than the private car. Similarly, the recommendations of this report, whilst focused specifically on meeting the needs of tourists, will have obvious benefits to local residents.
- Longer distance trips into the South West*
- E.5 Rail currently accounts for approximately 6% of all tourist based trips to the South West. This report recommends a number of initiatives aimed at making train travel more attractive for longer distance trips into the region. The cost of train travel, compared to the perceived cost of motoring (fuel) is an important issue to address.
- E.6 It is recommended that train operating companies be encouraged to offer greater incentives to tourists and that more flexible forms of ticketing be introduced to

offer better value for money. Sleeper services and Motorail are identified as potentially valuable alternatives to the private car and it is recommended that these be more actively promoted to tourists.

- E.7 In recent years, the nature of the tourism market in the South West has shifted towards increasingly becoming a short break destination. Ensuring reliability of public transport is therefore crucial as travel time is at a premium. Further important issues relate to the convenience of travelling by train, such as the difficulty of carrying luggage and the inconvenience of interchange.
- E.8 It is recognised that the mode of transport required to make the 'last leg' of a journey can often dictate the mode used for the whole journey. The report therefore considers the importance of integration between this and the longer distance journey. Recommendations are made in respect of the integration of rail with buses, taxis and hire cars.
- E.9 Cycling is a popular activity in the South West and is an important potential growth area for tourism. The integration of cycling with other modes is therefore given particular consideration. At present, the carriage of cycles by train is difficult, with limited capacity and inflexible booking arrangements. Recommendations are made in respect of these issues. In addition, the need to provide cycle racks on buses, provide secure cycle parking facilities and ensure that key destinations are accessible by cycle is emphasised.
- Travel within the South West*
- E.10 In respect of shorter distance tourism trips around the South West this report emphasises the need for travel information to be available in advance. Many of the recommendations made therefore focus on ways in which potential visitors to the region can be made aware of the opportunities to travel around their holiday destination without a car before they leave home. Indeed, it is recognised that the early availability of this information can in fact influence the mode of transport chosen for the longer distance trip. Recommendations also focus on making this type of information readily available at the holiday destination. 'Bedroom browsers' and information leaflets can play an important role in this respect.
- E.11 Local rail and bus networks can offer suitable alternatives to the private car for many tourist trips around the region. This report recommends that more flexible ticketing systems should be implemented to make the use of these modes more straightforward and offer better value for money.

E.12 Demand responsive buses offer a potentially beneficial way of providing public transport in rural areas. For example, in areas where camp sites are remote from traditional bus routes, demand responsive services offer the opportunity for people to travel around without the car. This report recommends that demand responsive services be developed to serve tourist areas and that these be promoted and marketed as offering a convenient alternative mode of transport.

E.13 Cycling, both in its own right and in combination with bus/rail, is identified as an important mode of transport for trips around the region. This report recommends that a network of linked cycle hire facilities should be set up such that cycles can be hired from one location and returned to another. The benefits of cycling, and the opportunities it creates, should be actively marketed in the form of 'days out' leaflets and similar initiatives.

The Tourist Industry

E.14 The tourist industry itself has an important role to play in influencing the travel behaviour of tourists. This report recommends that the industry become more pro-active in providing information on public transport and encouraging guests to consider alternative modes of transport.

E.15 Attractions should be encouraged and assisted to produce Travel Plans, implementing measures to encourage the use of public transport, walking and cycling, and setting up systems to monitor progress. Attractions and accommodation providers should also be encouraged to include details about access by public transport in their promotional material.

E.16 Attractions should be encouraged to develop more sophisticated visitor management techniques such that the influx of visitors to a particular site does not have a detrimental impact on the surrounding transport network.

Other Recommendations

E.17 Other recommendations address the importance of encouraging further development of holiday packages, in which travel (by train or coach) is booked at the same time as accommodation or attraction tickets. Whilst such packages are offered by some companies there is scope for this to be further emphasised and encouraged.

E.18 The importance of providing good quality public transport information is discussed. Whilst it is recognised that recent initiatives have gone a long way to improving access to public transport information at a national level, a number of recommendations are made regarding improvements that should be made to these services.

E.19 Finally, the importance of joined up thinking between authorities and organisations responsible for transport and tourism is recognised. The benefits of a more integrated approach to planning are clear.

Pilot Studies/Monitoring

E.20 It is recommended that a number of pilot studies be implemented as a means of monitoring the effectiveness of the types of initiatives discussed in this report. In addition, monitoring of existing schemes is recommended in order to assess the contribution that different initiatives will make to the objectives of this Tourism Plan.

Priorities

E.21 A series of short and medium term priorities are identified. The short term priorities identified fall generally into two categories. These are

- Information based measures; and
- Cost and amenity based measures

E.22 These measures are likely to play a significant part in achieving the objectives of this Tourism Plan. They should be set in motion at the earliest opportunity.

E.23 The medium term priorities identified will generally either take longer to implement or would be more effective with the short term priorities already in place. They remain however, important parts of a package of measures to address tourist travel.

1 Introduction

1.1

The SWARMMS Study

1.1.1

Halcrow was appointed by the Government Office for the South West (GOSW) in March 2000 to undertake the London to South West and South Wales Multi-Modal Study ('SWARMMS' – South West Area Multi-Modal Study). The overall aim of the study is to make recommendations for a long-term strategy to address passenger and freight transport needs within the key transport corridors between London and the South West of England and South Wales (M3, M4, M5, A303, A30, A38 and the parallel rail routes) as shown in Figure 1.1.

Figure 1.1: Map of the SWARMMS Study Area



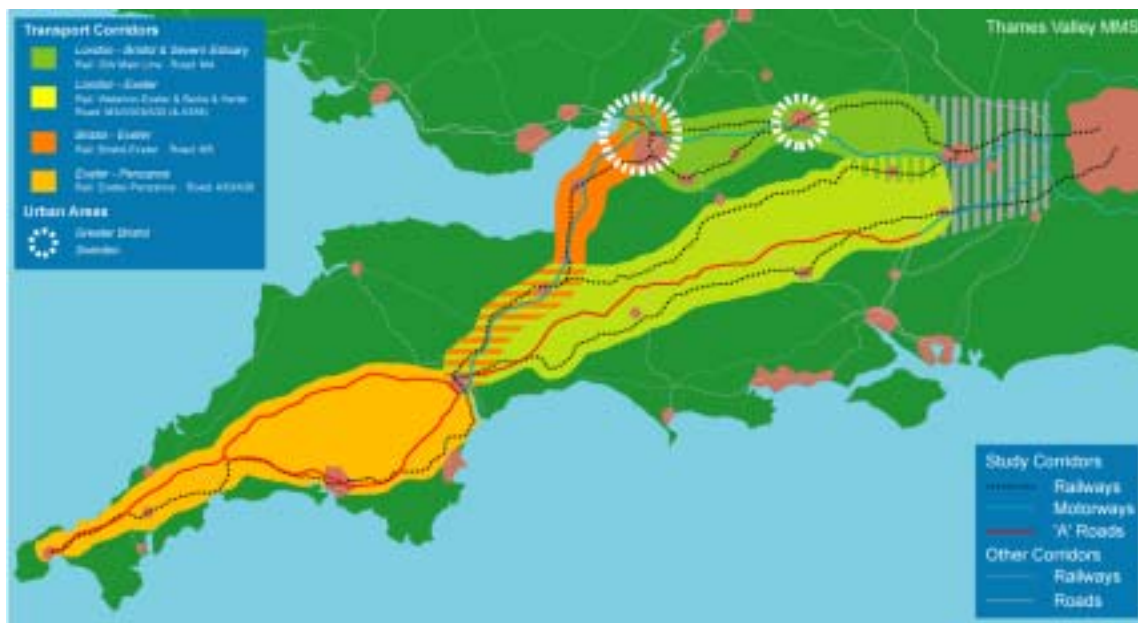
1.1.2

This will include, as and where appropriate, plans of specific interventions to address existing and predicted strategic transport problems in the study area, looking in particular at opportunities for reducing congestion by better management and modal shift, as well as options for taking forward focused improvements.

1.1.3 The Strategy developed in SWARMMS comprises a range of policies and schemes that, together, are designed to effectively address the transport problems of the SWARMMS area. While many parts of the strategy offer solutions to the specific locational problems which occur, this Plan specifically addresses the issue of tourism.

1.1.4 There are nine other Plans that form part of the strategy for the SWARMMS area. Four of them are multi-modal transport corridor plans, and two other Plans specifically address the principal urban areas of Bristol and Swindon. The coverage of the geographic plans is shown in Figure 1.2. There are obvious geographic linkages across these Plans.

Figure 1.2: Coverage of Geographic Plans



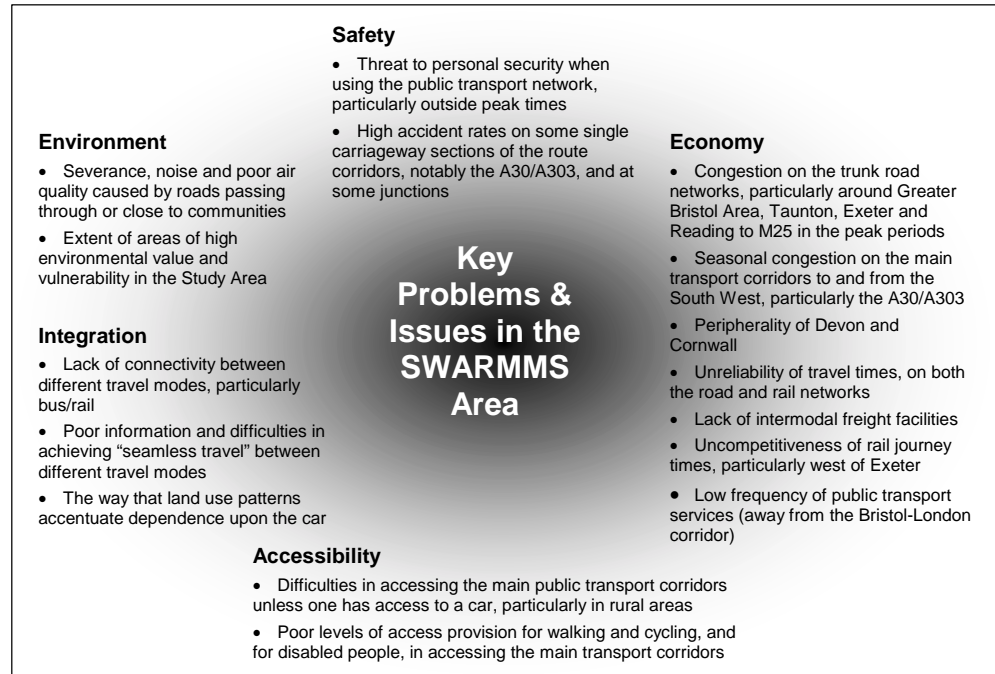
1.1.5 There are three other study-wide theme plans and these are reducing the growth in travel demand, rural access to the main transport corridors, and intermodal freight. This Plan for tourism and rural access Plan are inter-related, and where there are links and common influences, these have been noted.

1.2

Problems and Issues

The key problems identified earlier in the study, which apply to the whole of the SWARMMS study area, are shown in Figure 2.1.

Figure 2.1: Key Problems and Issues in the SWARMMS Area



1.2.1

Many of these problems and issues apply to tourism. Those of particular relevance are as follows:

- *Congestion on the trunk road network, particularly around Greater Bristol Area, Taunton, Exeter and Reading to M25 in the peak periods and seasonal congestion on the main transport corridors, particularly the A30/A303* – Congestion can act as a disincentive to tourists wishing to travel by car.
- *Unreliability of travel times, on both the road and rail networks* – Both perceived and actual unreliability can be a disincentive to visitors particularly with the short break market becoming increasingly common.
- *Poor information and difficulties in achieving 'seamless travel' between different travel modes* – It is often difficult to obtain information about public transport. Information, especially that relating to ticketing, for rail and coach services can be confusing and information about public transport at the destination end can be difficult to obtain before leaving home. Information about

modes of transport available for the final 'leg' of the journey, between the main transport corridor and the holiday destination is important, often dictating the mode used for the entire journey.

1.3

Purpose of this Report

1.3.1

This report details the findings of the tourism study-wide theme plan. The background to this stage of activity can be found in earlier SWARMMS reports such as the Problems and Issues Reports and also the Participation and Consultation Reports.

1.3.2

Whilst the SWARMMS study covers a wide area that includes the main transport corridors from London to Penzance and South Wales, this Tourism Plan focuses specifically on the relationship between tourism and transport in certain parts of the South West region. Particular emphasis is given to Cornwall, Devon, Bath and North East Somerset and North Somerset. This reflects the dominance and importance of tourism in these areas, as identified by earlier work. However, many of the recommendations made in this report in respect of these areas also apply to the whole of the South West region.

1.3.3

For the purposes of this report, the South West is taken to mean the area covered by the Government Office for the South West. This covers, Bristol, Bath and North East Somerset, North Somerset, South Gloucestershire, Cornwall and the Isles of Scilly, Devon (including the Plymouth and Torbay unitary authorities), Dorset, (including the unitary authorities of Bournemouth and Poole), Gloucestershire, Somerset and Wiltshire (including the Swindon unitary authority).

1.3.4

The report considers:

- The requirements of the tourism industry from transport and the transport network; and
- The effects of tourism on transport and the transport network.

1.3.5

The report aims to:

- Understand current/future trends in the tourism industry;
- Understand the future aspirations of the tourist industry;
- Gather information regarding mode of tourist travel, both to and within the South West;

- Understand how transport impacts on the potential for tourism growth; and
- Identify opportunities to improve more sustainable travel to the benefit of the tourist industry.

1.3.6

The recommendations made at the end of the report aim to:

- Encourage tourists to use public transport (rather than the private car) for journeys to the South West, or for trips around the South West; and
- Attract additional tourism trips by public transport.

1.4

Definitions of Tourism

1.4.1

Tourism covers a wide range of activities and types of development and it therefore impinges on many different types of locations, both urban and rural. It is made up of a wide range of very different, but interdependent, activities. These include accommodation, catering, transport, tourist attractions, information provision and other facilities and amenities designed to cater for the needs of the visitor. The Tourism Society defines tourism as “the temporary short-term movement of people to destinations outside the places where they normally live and work and the activities during their stay at these destinations” (PPG21).

1.5

Links to Other SWARMMS Plans

'Reducing the Growth in Travel Demand'

1.5.1

Tourism is inevitably a generator of travel and of the need to travel. It is important to state that this Tourism Plan is not seeking to reduce the amount of travel undertaken for tourism purposes. Indeed, SWARMMS is seeking to increase tourism activity for the reasons of benefiting the local economies – this inevitably means an increased need to travel. This aspect of the SWARMMS study is however looking to encourage the use of more sustainable modes for tourist-based travel.

Rural Access to the Transport System

1.5.2

There are also important links between this Tourism Plan and the Rural Access to the Transport System Plan. This considers ways in which access to the main strategic transport corridors from rural areas can be improved. The report considers alternatives to traditional bus services and emphasises the potential role that more flexible forms of transport can play in improving rural access.

1.5.3 When implemented, the recommendations made by the Rural Access Plan will have benefits for tourist activity, making rural areas easier to access by means other than the private car. Similarly, the recommendations of this report, whilst focused specifically on meeting the needs of tourists, will have obvious benefits to local residents.

Corridor and Area Plans

1.5.4 Issues related to general access to and from the South West are considered by the various other SWARMMS Plans as follows:

- Corridor Plan: London to Exeter;
- Corridor Plan: London to Bristol
- Corridor Plan: Bristol to Exeter;
- Corridor Plan: Exeter to Penzance;
- Area Plan: Swindon; and
- Area Plan: Bristol.

1.5.5 These Plans propose improvements to the strategic road and rail networks. Such improvements will benefit tourists accessing the South West by both road and rail.

1.6 ***Content of Report***

1.6.1 Following this introduction, Chapter 2 describes the study methodology.

1.6.2 Chapter 3 reviews national and local tourism policy and thus sets the context for the SWARMMS strategy. It also summarises relevant transport policy and policy relating to sustainable development. It highlights the need to nurture the tourism industry in a manner which minimises its adverse effect on the environment.

1.6.3 Chapter 4 considers the relationship between tourism and transport. It identifies a number of trends, problems and issues.

1.6.4 Chapter 5 provides background information on tourism. It describes current and future trends in the tourism industry both nationally and for the South West region. It presents relevant statistics on tourism and highlights the importance of the industry to the local economy.

1.6.5 Chapter 6 details the key issues raised during discussions with Local Authorities and summarises the issues raised in wider consultation.

- 1.6.6* Chapter 7 highlights a number of case studies and examples of best practice.
- 1.6.7* In Chapter 8, 9, 10 and 11, a series of recommendations regarding tourism and tourist related travel is presented. Recommendations are made for both longer distance travel into the South West and for shorter tourist within the region.
- 1.6.8* Chapter 12 builds on the recommendations discussed in Chapters 8 to 11 by listing priorities for action. Chapter 13 discusses the need for pilot studies and monitoring activities. Chapter 14 details the conclusions of this study.
- 1.6.9* Supporting information is presented in Appendices at the end of the report.

2 Methodology

2.1 *Introduction*

2.1.1

This Chapter describes the methodology adopted in conducting this tourism and transport plan for SWARMMS. It describes the means by which data was collected, the meetings that were held with interested parties and the methods of research that were used.

2.2 *Data Collection*

2.2.1

Data relating to tourism in the South West was required in order to fully understand the nature and characteristics of the industry. Relevant data relating to the following issues were therefore sought:

- Number of tourist trips;
- Types of tourists;
- Contribution to the local economy;
- Origin/destination of tourist trips;
- Number of nights stay;
- Accommodation/holiday type;
- Attractions visited; and
- Mode of travel.

2.2.2

This information was obtained from:

- Local Authority sources;
- Tourist organisation publications and websites (such as South West Tourism, and English Tourist Board);
- Market research publications and websites; and
- Data provided by other organisations.

2.3 *Policy Context*

2.3.1

In order to establish the policy context for tourism in the South West, for which SWARMMS must have regard, a desk top study was conducted. The following types of policy documents were obtained and reviewed:

- Government policy on tourism (various strategies published by the Department of Culture, Media and Sport, for example 'Tomorrow's Tourism');
- Government policy on transport (various strategies published by the DTLR, formerly DETR, for example 'A New Deal for Transport: Better for Everyone');
- Regional Planning Guidance for the South West (RPG 10); and
- Planning Policy Guidance (for example, PPG13 – Transport, PPG21 – Tourism).

2.3.2 In addition, regional and local strategies dealing with tourism and economic development were reviewed. For example, 'A Strategy for Tourism in the South West' published by South West Tourism proved to be a useful reference. The regional sustainable development framework. was also referred to.

2.3.3 The policies and strategies of other organisations were also considered. For example, position statements published by the National Trust relating to rural development and sustainable tourism were reviewed. Transport 2000's document 'Tourism without Traffic' was a further important reference.

2.4 ***Case Studies and Best Practice***

2.4.1 A further desktop research exercise was conducted to identify appropriate examples of best practice in the following areas:

- Sustainable tourism;
- Car free tourism;
- Visitor management;
- Partnership and joint ventures (such as ticketing); and
- 'Tourist friendly' public transport.

2.5 ***Meetings with Key Stakeholders***

2.5.1 A series of meetings were held with interested parties and key stakeholders.

2.5.2 In June 2000 a topic group meeting was held to discuss transport issues related to tourism. This involved a range of Local Authorities and other key stakeholders. This session helped to identify the basic transport problems, as perceived by the tourism industry.

2.5.3 During Autumn 2001 meetings were held with each of the following Local Authorities:

- Cornwall County Council;
- Devon County Council;
- Bath and North East Somerset Council;
- North Somerset Council; and
- Plymouth City Council.

2.5.4 Where possible meetings were arranged to include officers with responsibilities in the following areas;

- Tourism;
- Transport;
- Public Transport; and
- Economic Development/Marketing.

2.5.5 South West Tourism was also consulted in a regional capacity. In addition meetings were held with the Countryside Agency and First Great Western Trains.

2.5.6 Meetings were also requested with other organisations and, although not forthcoming, information on their policies and activities was obtained via websites and publications.

2.5.7 The meetings held helped to:

- Obtain additional information and statistics;
- Establish the aims and ambitions of the tourist industry;
- Establish what improvements the tourist industry feels is necessary to improve transport, such that more people will be encouraged to visit the South West by public transport;
- Consider the improvements/changes that need to be made to encourage people to travel to the South West by means other than the private car;
- Consider the improvements/changes that need to be made to encourage people to travel by sustainable modes, once they reach their destination in the South West;
- Understand the role that the tourist industry can play in alleviating congestion and improving conditions of the main transport corridors;
- Establish where there are 'gaps' in current transport provision; and

- Establish whether there is a market to sustain the provision of additional transport infrastructure/services (for example, additional car hire facilities or an extended motorail service).

2.5.8

Brainstorming sessions on tourism issues were also held as part of the wider SWARMMS consultation that took place in November 2001. Sessions were held in Newbury, Swindon, Salisbury, Bristol, Exeter, Plymouth and Truro.

3 Policy Context

3.1 ***Introduction***

3.1.1 Policy guidance related to tourism is wide and varied. In this Chapter, relevant policy guidance at the national, regional and local level is discussed. This guidance forms an important framework in which the recommendations of the SWARMMS strategy must fit and for which proposals must have due regard.

3.2 ***Planning Policy Guidance***

3.2.1 Planning Policy Guidance notes (PPGs) set out the Government's policies on different aspects of planning. Tourism is considered specifically in PPG21 and transport in PPG13. Several other PPGs also deal with related issues. The main issues covered in these are summarised below.

PPG21 – Tourism

3.2.2 PPG21 (DoE, 1992) recognises the need to encourage tourism whilst, at the same time, conserving the environment. It sets out Government policy to secure a proper balance between:

- Maximising the economic and employment benefits that tourism can bring;
- Promoting geographical and seasonal spread of tourism;
- Encouraging the development of non-traditional destinations as well as more popular visitor locations;
- Respecting the needs of the tourist industry and its customers;
- Safeguarding the environment; and
- Protecting the interests of the communities that cater for its needs, but feel its effects.

3.2.3 PPG21 outlines four guiding principles in the Government's support for tourism:

- Supporting the development of the industry in ways which contribute to, rather than detract from, the quality of the environment;
- Promoting the understanding of environmental quality concerns within the industry and of the need to improve the quality of its service and its producers;

- Ensuring through the regional tourist boards and Training and Enterprise Councils that managers in tourism adopt visitor management techniques that can mitigate the impact on the environment; and
- Encourage those types of tourism which in themselves aim to safeguard the environment.

PPG13 – Transport

3.2.4 PPG13 (DETR, 2001) aims to integrate planning and transport at the national, regional strategic and local level. The objectives of PPG13 are to:

- Promote more sustainable transport choices for both people and the moving of freight;
- Promote accessibility to jobs, shopping, leisure facilities and services by public transport walking and cycling; and
- Reduce the need to travel, especially by car.

3.2.5 Developments involving leisure, tourism and recreation which generate large amounts of travel should accord with the advice contained in PPG13. In determining the acceptability of new developments of this nature the following factors are important:

- The extent to which proposed development needs to be in the proposed location (whether it has a meaningful link with the particular location/attraction);
- Scale, layout, parking and access arrangements; and
- Measures to increase access to the site by sustainable transport modes, and the use of traffic management and appropriate parking policies near to the site.

3.2.6 PPG13 states that interchange between different modes of transport should be quick, easy and safe. Interchange points should be well related to travel generating uses and seek to maximise the catchment population. Sites and routes for interchange should be identified and protected.

3.2.7 The provision and availability of parking spaces is a key issue of PPG13. It states that, as a package of planning and transport measures, levels of parking should promote sustainable transport choices. PPG13 sets maximum parking standards for different types of development.

3.2.8 The importance of public transport is acknowledged. The identification of key routes, creation of new routes and interchanges, improved interchange and better personal security are important considerations. PPG13 suggests that park and ride schemes can help to promote sustainable travel patterns and improve accessibility. PPG13 also emphasises the importance of walking and cycling.

3.2.9 PPG13 argues that a pro-active approach in delivering sustainable transport solutions is called for. Planning conditions and planning obligations are noted as important instruments. Travel Plans are also recognised as important tools in delivering sustainable transport objectives.

3.3 ***Regional Planning Guidance***

Regional Planning Guidance for the South West - RPG 10 – (Sept 2001)

3.3.1 RPG10 states that, in the South West, tourism is one of the region's most important industries, accounting for around 10% of employment. Tourism spending accounts for 10% of the region's GDP, compared to 7% nationally. Tourism is particularly important to the economies of Devon and Cornwall. Indeed, tourism accounts for 24% of Cornwall's GDP, employing 15% of the workforce and supporting 42,500 actual jobs. In Devon, tourism accounts for, around 10% of GDP. Commercial accommodation in the South West can host 600,000 tourists, with around 70% of this capacity being in the self-catering sector.

3.3.2 There are broad differences between the North and South of the region. The North has less economic dependency on tourism, a higher proportion of short breaks and business visits and less seasonal variation in room occupancy. In contrast, the industry in the South and West of the region is more dependent on holiday visits from UK visits, exhibits stronger seasonality and has the greatest concentration of accommodation to rent.

3.3.3 Policies are aimed at:

- Making the South West a flagship for sustainable tourism;
- Protecting and enhancing environmental assets; and
- Increasing the economic and social benefits of tourism for the region's residents.

3.3.4 Policy TCS1 (Tourism) states that Local Authorities, tourism bodies and other agencies should seek to promote and encourage sustainable tourism in the South West by:

- Improving the quality and range of attractions and accommodation in the region, especially those which:
 - promote the special cultural, heritage and countryside features of the region;
 - complement or enhance the local environment and are of a scale appropriate to the location and setting of the area;
 - support regeneration initiatives in coastal resorts, market towns and larger urban areas;
- Providing for major new flagship attractions in sustainable locations which:
 - will substantially expand the tourism market away from areas already under greatest pressure;
 - are readily accessible by public transport and can be integrated into cycle and pedestrian routes;
 - can provide opportunities for secondary attractions to locate nearby rather than compete with existing attractions;
 - promote the use of environmentally sound and sustainable construction, design and operational practices (identifying and implementing management measures and action to deal with the pressures of tourism in 'honeypot' areas (i.e. traditional, well known sites that attract large numbers of tourists) and ensuring that additional development does not exacerbate the problems facing such areas;
- Encouraging small scale tourism, including farm activity tourism initiatives, in areas where it will assist the diversification of the rural economy and primarily at the most accessible locations (recognising that the potential for using public transport and other non-car modes is more limited than in urban areas).

3.3.5

RPG 10 sets out the regional Transport Strategy (RTS) for the South West. The RTS has five key objectives, as follows;

- To support the spatial strategy of RPG and to service existing and new development efficiently and in an integrated fashion;
- To reduce the impact of transport on the environment by reducing the need to travel, encouraging travel by more sustainable means and locating development at accessible locations;
- To secure improved accessibility to work, shopping, leisure and services by public transport, walking and cycling;

- To create a modern, efficient and integrated transport system that will meet the demands of a dynamic regional economy, help overcome regional peripherality and meet all travel needs; and
- To ensure the safe use of the regional transport network and its associated facilities.

3.3.6 The RTS sets out a series of policies for walking, cycling, public transport, airports, waterborne transport, demand management and infrastructure. Whilst these proposals have links to tourism and they do not refer specifically to the needs of tourist travel. This Plan stage work will feed into the further development of the RTS.

3.4 ***Government Strategy on Tourism***

Tomorrow's Tourism: A Growth Industry for a New Millennium

3.4.1 'Tomorrow's Tourism' (Department of Culture, Media and Sport, 1999) sets out the Government's strategy for tourism. It aims to help create a competitive, world-class tourism industry in England. The strategy recognises that the impact of tourism is enormous, both on individual communities and in terms of self-image. At the national level tourism is one of the most important industries offering, amongst others, the following benefits:

- The generation of wealth;
- The creation of jobs;
- The promotion of entrepreneurship;
- The provision of social and environmental benefits; and
- Support for local diversity and cultural traditions.

3.4.2 Tomorrow's Tourism builds on the 1998 consultation paper 'Tourism: Towards Sustainability' to suggest that action is needed on six fronts. These are to:

- Establish an effective policy framework;
- Maximise tourism potential to benefit local communities;
- Manage visitor flows;
- Address associated transport flows;
- Address associated planning issues; and
- Build partnerships between public, private and voluntary sectors.

3.4.3 In terms of managing visitor flows the strategy recognises that too many visitors in one place at the same time can damage the local environment, alienate the

community and reduce the quality of experience for visitors. It therefore aims to promote the better management of visitors at a local level in order to spread the benefits of tourism more equally, whilst minimising the negative impacts by:

- Promoting the development of effective visitor management plans which implement techniques such as market segmentation, advance booking mechanisms, combined ticketing initiatives, and effective signposting to direct tourists within and around heavily utilised sites;
- Promoting the introduction of locally agreed schemes to alleviate pressure in areas experiencing high tourist pressures by encouraging visitors to less popular areas, preferably those which have good access by public transport; and
- Setting up a National Sustainable Travel and Tourism Website which will provide a central point of access to information and resources and best practice.

3.4.4

In terms of addressing the transport issues related to tourism, the strategy recognises that travelling to and around a destination has a major impact on the environment. As such, it aims to:

- Improve the quality and accessibility of information available to tourists about travel choices by working in partnership with Local Authorities and operators to develop a national, integrated public transport information service, promoting integrated timetabling between modes, providing accessible and intelligent integrated transport maps and encouraging the tourism industry to include information about public transport links and alternative modes in brochures and other marketing materials;
- Examine the potential for delivering integrated public transport and tourist information to tourists in a user friendly way, through electronic or other means;
- Encourage tourist and leisure site managers to produce green Travel Plans and produce guidance on best practice to help in the development of such plans;
- Encourage the upgrading of public transport infrastructure to accommodate leisure capacity, for example by providing facilities for bicycle carriage, cycle parking and improving the frequency of weekend services;
- Identify and publicise schemes which utilise transport or visitor management techniques to good effect, for example, park and ride,

integrated ticketing schemes, discounts or other incentives at attractions for those arriving by public transport, and free or reduced price local bus or train services;

- Encourage the creation of new tourism products which integrate walking with cycling or travel by bus and rail as part of the experience and which cater for all passengers, including people with young children.

3.4.5 The strategy also recognises the need to address the consequences of increased demand for air travel for those who wish to travel to and around the UK and therefore aims to encourage the growth of regional airports to meet local demand for air travel.

3.5 ***Tourism Industry Strategies***

'Towards 2020' – A Tourism Strategy for the South West (March, 1999)

3.5.1 'Towards 2020' sets out an overall vision for tourism in the South West. By 2020 it is hoped that the region will have:

- Achieved a faster growth in tourism spend than the national average, with a target of £3.5 billion or 60% increase in the real value of tourism spend;
- Increased the number and quality of jobs supported by tourism, with a target of an additional 70,000 jobs by 2020;
- Increased the proportion of GDP in the region arising from tourism and leisure activity;
- Provided opportunities for new entrants and tourism related businesses across the region;
- Increased the number of tourism trips and days, but at a slower rate than the national average;
- Decreased the seasonality of tourism activity, with significant increases in the shoulder months;
- Be receiving more overseas visitors, with greater opportunities for them to fly directly to the South West through improved regional airports;
- Increased the share of the tourism market received by cities and towns, and to a lesser extent the countryside, although the seaside resorts will continue to be a very important location for tourism activity;
- Enhanced the distinctive character and quality of local destinations across the region;
- Reduced the proportion of car borne trips to and within the region;
- Encouraged the tourism industry to have adopted best environmental practice;

- Increased the awareness and appreciation of the visitor;
- Ensured that local communities are much better aware of the benefits associated with tourism and its contribution to their prosperity; and
- Encouraged the involvement of the local community in the development and management of tourism in their area.

3.5.2

South West Tourism (formerly the West Country Tourist Board) and the South West Regional Development Agency are currently working on a Tourism Strategy to take forward these objectives.

4 Transport and Tourism

4.1 Introduction

4.1.1

This Chapter provides a discussion of national trends in tourism and leisure based travel and then goes on to highlight some of the problems and issues in the South West.

4.2 Tourism and National Travel

4.2.1

The National Travel Survey (1998-2000 update) states that 3% of all trips made in Great Britain are for holidays or day trips. More holiday/day trips are made by older age groups, with this percentage rising to 5% of all trips made by people in the 60-69 age group and 4% of all trips made by people aged over 70.

4.2.2

Figure 4.1 illustrates the number and percentage of trips made per person per year, by journey purpose.

4.2.3

Figure 4.2 shows that whilst holidays and day trips account for only 3% of all trips made, they account for 12% of total journey mileage undertaken.

Figure 4.1 – Number of trips per person per year by journey purpose (total number of trips – 1030). Source: National Travel Survey 1998-2000 Update

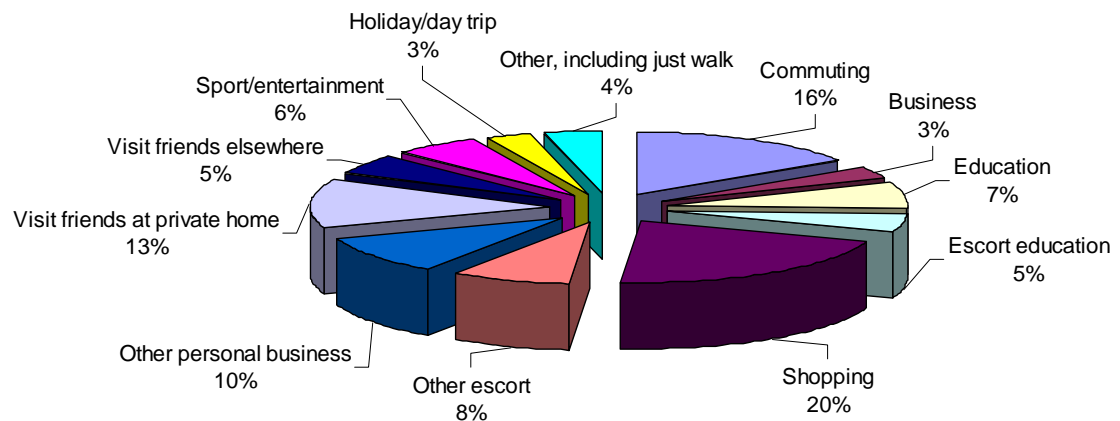
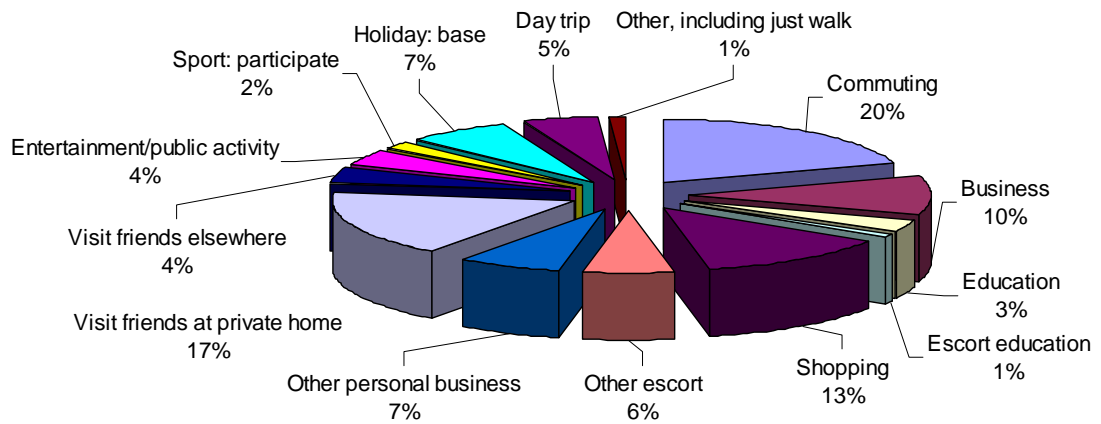


Figure 4.2 – Number of miles travelled per person per year by journey purpose (total number of miles travelled – 6843) Source: National Travel Survey 1998-2000 Update



4.2.4 ‘Tourism and Transport: The Issues and the Solutions’ (ETC, 2001) draws upon data from the UK Tourism Survey 1999 and the UK Day Visits Survey 1999 to highlight that 85% of tourism travel made by UK tourists in England is by road, 10% by train, 3% on foot, 1% by air, and less than 1% by bicycle. Of those that travel by road, 74% travel by car, 5% by scheduled bus, 3% by organised coach party and 3% by other modes.

4.2.5 Patterns of travel for day trips show several important differences. Whilst the overall percentage travelling by road is similar (83%), a lesser percentage travel by train (only 5%), and many more people rely on walking (10%).

4.3 *Characteristics of Tourism Travel*

4.3.1 In the document ‘Tourism and Transport: The Issues and the Solutions’ the English Tourism Council (ETC) note a number of special characteristics of tourism travel. These are reproduced in full below. Essentially they outline the factors that this study must recognise and, where appropriate, take account of:

- Tourism journeys compared to work or educational trips, are optional rather than a necessity;
- Tourism trips generate additional economic activity and benefits at the visitor destination;

- Tourism trips are generally longer than the average trip, with holiday and day trip journeys accounting for around a quarter of all trips of over 50 miles. Thus they often account for a higher proportion of traffic on strategic routes;
- Tourism trips have a seasonal pattern. The volume of tourism trips is three times as high in the summer quarter as it is in the winter quarter, although the seasonal pattern of tourism day trips is less well marked;
- Tourism activity is not distributed evenly and generates a higher proportion of journeys in attractive destinations;
- Tourism travel is potentially more flexible – people travelling for leisure purposes are less bound by deadlines and less often concerned with journey time so long as the journey itself is desirable;
- Tourism travel can be part of the holiday product, e.g. cycling and walking holidays, coach touring holidays, and other niche travel opportunities; and
- A high proportion of tourism trips are made by people unfamiliar with the area to which they are travelling and therefore rely much more on information to aid them in reaching their destination.

4.4

English Tourism Council

4.4.1

The ETC's broad objective for transport and tourism is to improve access to tourism destinations throughout England, and enhance transport management at those destinations, while minimising the impacts associated with travel. The ETC expects the car to remain the principal mode of transport for the medium term. For most tourists, the car provides real advantages in terms of flexibility, comfort and lower cost (whether actual or perceived). The ETC recognises that changes in lifestyle will be needed to achieve real changes in travel and that alternatives to the car must be attractive if they are to be used.

4.4.2

The ETC states that there is a need for major investment in strategic transport networks to improve capacity. Primary concerns for tourism are:

- Gateways into the UK for overseas visitors, particularly the anticipated growth in demand for entry by air;
- The strategic road network, particularly those sections that are heavily used by tourists, which largely coincide with those lengths already under stress, and links to seaside resorts which are a target for regeneration; and
- The strategic rail network to increase capacity for rail operations.

4.4.3 The ETC also wishes to see enhanced provision of information before departure, en route, and on arrival, in order to assist tourists in deciding on their mode of travel and assist them in finding their destination. Travel information should be integrated with information on accommodation and attractions. The importance of a user friendly public transport system is recognised. In particular, the ETC stresses the importance of through ticketing, joint ticketing, simple price structures and integrated packages between accommodation and attractions.

4.4.4 The quality and design of transport interchanges are noted as crucial to the comfort of travel. Ease of transport and carriage of luggage is a particularly important issue.

4.4.5 Among the ETC's conclusions are the following points, of relevance to this study:

- Given the potential of the rail network to provide an attractive alternative to the car for longer tourism journeys, transport operators, tour operators and local destinations should be encouraged to market and develop rail transport opportunities for both domestic and overseas tourists;
- Destinations and operators should draw on England's rich transport heritage and other opportunities to develop alternative transport options to improve the local visitor experience;
- Accommodations and attraction operators should be aware of and encouraged to make available information on local public transport, walking and cycling routes in their localities; and
- Local Authorities and transport operators should ensure that interchange facilities are of high quality and easy to use.

4.5 ***Problems and Issues***

4.5.1 'Tomorrow's Tourism; (DCMS, 1999) presents an analysis of the responses to 'Tourism – Towards Sustainability: A Consultation Paper on Sustainable Tourism in the UK'.

4.5.2 In considering the ways in which visitors can be encouraged to use more environmentally friendly modes to reach their destination, practical responses from the consultation fall into five broad categories:

- Encourage tour operators, coach operators, attractions etc to market public transport links/combined ticketing and packages (including

cycling), at competitive prices. Facilitate simple advance booking of in-destination travel;

- Work with public transport providers to upgrade infrastructure and vehicles, to accommodate leisure capacity (e.g. cycle carriage, wheel chair access), reduce timetable changes, introduce tourist services, improve appeal by competitions (e.g. bus stations in bloom);
- Introduce voucher schemes or rover tickets to encourage tourists to visit a number of facilities at discounted prices/offer discounted access to those arriving by public transport;
- Improve road/public transport connections to less visited areas; and
- Improve training provision for public transport staff – perhaps via a code of practice – to give better understanding of the needs of visitors (including the less able bodied).

4.5.3

In considering the ways in which visitors can be encouraged to use more environmentally friendly modes within their destination the following responses were received:

- Improve (especially pre-travel) transport awareness of business/visitors/residents. Encourage promotion of easily understandable and correct regional travel information in, e.g. in-flight brochures, hotel brochures, Internet and Tourist Information Centres at gateways;
- Encourage provision of alternatives such as bicycle rental facilities, showers for employees, nature trails, cycle paths, trams, and safe storage of cycles (recognising that they are not relevant to all groups). Provide centralised drop off points for coaches for the less fit;
- Encourage the development of frequent, convenient and reliable public transport focusing on park and ride systems using innovative as well as traditional modes (e.g. ferries) from gateways with flexible pick up/drop off points and secure parking;
- Improve via PPGs strategic co-ordination/establish partnerships between those responsible for promoting tourism and traffic management to research travel patterns/build consensus over delivery/set quality standards/exchange good practice;
- Introduce non-motorised traffic zones (pedestrianisation) or times/construct traffic calming to discourage car access;

- Encourage tourism businesses to provide transport of an appropriate scale (such as a meet and greet or a mini-bus service) or to sell/provide public transport tickets from major interchanges (e.g. the hotel/beach);
- Encourage attractions to develop partnerships to transport guests between facilities; and
- Recognise (via PPG) the essential need for car usage in some areas by both tourists and residents.

4.6 ***Environmental Impacts of Traffic and Tourism***

4.6.1 South West Tourism estimates that the number of tourism trips in the region could grow by as much as 80% by 2020. The Regional Sustainable Development Framework document (South West Regional Assembly, 2000) expresses concern about this prospect because, unless the nature of tourism changes, this increase could be unsustainable, particularly in the adverse impacts of transport.

4.6.2 West Country Tourist Board Statistics show that around 80% of tourists come to the South West specifically because of the region's environment and heritage. However, regional sustainable development framework states that the fact that the majority of tourists travel both into and around the region by car is an increasing threat to the region's environment.

4.6.3 Environmental impacts are one of the five primary assessment criteria for which multi modal studies such as SWARMMS must have regard. The environmental impacts of traffic and transport infrastructure are therefore being considered in the appraisal of the SWARMMS preferred strategy.

5 Tourism in the South West

5.1

Introduction

5.1.1

Tourism is a vital part of the economy of the South West. However, trends in tourism vary within the region. This Chapter provides information on the tourist industry using the most up to date information available. The discussion focuses on the following types of information:

- Number of visitors;
- Origin of visitors;
- Seasonality;
- Importance to the local economy;
- Key characteristics of visitors; and
- Mode of travel.

5.2

General Statistics

5.2.1

Statistics detailing tourism trends at a regional level are available for the West Country region. Whilst this does not correspond exactly with the definition of the South West region (West Country omits Gloucestershire and Eastern Dorset), they provide a useful overview of general trends.

5.2.2

The fact sheet 'Facts of Tourism 1999' compiled by South West Tourism, states that the West Country region accounts for 15% of England's domestic tourism trips, 21% of nights and 22% of spending. The West Country attracts fewer overseas visitors, accounting for only 7% of trips to England, 6% of nights and 7% of spend. The following characteristics of tourism in the West Country are important to note:

- In 1999 19.6 million tourist trips were made to the West Country by UK residents, generating 85 million tourist nights and £2,879 million of spending;
- 71% of these trips are for holidays, 17% visiting friends and relatives, and 9% for business/conferences;
- Overseas visitors generated 1.6 million trips to the West Country in 1999, 11.9 million nights and £500 million of spending. Overseas visitors therefore stay proportionally longer and spend more than domestic tourists;

- Accommodation types vary, with the most popular with UK residents being the home of a friend or relative (37%). 18% stay in hotels and guesthouses, 10% in rented houses/chalets and 8% camp. A similar proportion of overseas tourists also stay with friends and relatives, although a great deal more (47%) stay in hotels and guesthouses;
- 38% of domestic tourists visit the West Country in July, August and September and 26% in April, May and June. The winter months are less popular, with 14% visiting in January, February and March and 22% in October, November and December. The pattern of overseas tourism shows greater seasonality, with higher proportions travelling in the summer months;
- The majority of tourists are in the 25 to 34 and 35 to 44 age groups (22% and 20% respectively in 1999). 1994 to 1999 figures show that these age groups have declined as a proportion of all visitors in recent years. Conversely, the 45 to 54 and 55 to 64 age groups have increased as a proportion of all visitors in recent years, accounting for 15% and 13% respectively in 1999;
- For the West Country as a whole, the car is by far the dominant mode of transport, accounting for 81% of all tourist trips in 1999, 1998 and 1997, falling slightly from 82% in 1995. Coach tours account for 4% of tourist travel. Around 6% of visitors travel by train and around 3% by bus. Hired car is listed as a category but does not register a figure;
- In 1999, 30% of visitors to the West Country originated in the South West, 34% from London and the South East, 10% from the West Midlands, 6% from the East Midlands and 6% from East Anglia;
- Hiking and rambling are popular activities, undertaken by 21% of visitors. 5% of visitors also enjoy cycling.

5.3

5.3.1

Detailed Statistics

Tourism data provided by the following Local Authorities were reviewed and considered in light of the aims of this report;

- Cornwall County Council;
- Devon County Council;
- North Somerset Council;
- Bath and North East Somerset Council; and
- Plymouth City Council.

5.3.2

Whilst the differences in available data, the presentation of statistics and the size of geographical area that these relate to make it difficult to make direct comparisons between areas, the following general trends are important to note:

- Cornwall is a popular destination for family groups (of between 3 and 5 people) accounting for around 50% of visitors. Weston-super-Mare is also primarily a family destination. Conversely, Bath receives very few family groups or younger visitors, with 82% of groups containing adults only;
- Statistics suggest that Cornwall receives more longer staying visitors than the rest of the South West, with 50% staying for 7 nights. Other regions, in particular North Somerset and Plymouth, attract mainly day visitors;
- The car is the most common mode of transport for tourist trips but its dominance differs between regions. Around 90% of all visitors to Cornwall (in 2000) and 77% of visitors to Torbay (in 1999) arrived by car. In Bath and North East Somerset reliance upon the private car is less dominant. 1999 statistics show that 53% of all visitors travelled by car, van or motorcycle;
- 4% of visitors to Cornwall arrive by coach compared to 12% in Torbay;
- Most visitors to Cornwall (40%) are from London and the South East. 18% are from the North and North West and 20% from the East and West Midlands. In Torbay, fewer visitors come from the South East (30%) and more from North (22%) and the Midlands (27%). Weston-super-Mare is more dependant on the Midlands, with 34% of visitors originating from this region;
- 4% of visitors to Cornwall, 3% of visitors to Torbay and 7% of visitors to Plymouth are from overseas. However, Bath is much more popular, with overseas tourists comprising 41% of all visitors; and
- The number of people agreeing that Cornwall is easy to get to has declined over recent years, from 77% in 1996 to 70% in 1998. Similarly, perception of congestion is changing, with 50% of visitors agreeing that the roads are un-congested in 1998, compared to 58% in 1996. Around half of visitors agree that parking charges are reasonable, however, this number has decreased slightly in recent years.

5.3.3

These statistics illustrate the important differences in tourism trends within the region. The recommendations made, and the initiatives considered, by this report should be mindful of these trends.

5.3.4 A full summary of statistics for a series of Local Authority areas is presented in Appendix A, at the end of the report.

5.4 ***Future Trends***

5.4.1 Trends in tourism are constantly changing as new types of activity, new attractions and new destinations become popular. A range of economic, social, cultural and technical changes will affect the future growth of tourism. The West Country Tourist Board (1998) (in 'A Strategy for Tourism in the South West 1999 – 2003: Consultation Draft) identifies a number of influential trends. These include:

- An ageing population – a fall in the proportion of the population under the age of 40 and a growth in the over 40s (particularly the 40-59 age group). Families with pre-school children are likely to decrease in number;
- A growth in single households – notably in older age groups, and in the proportion of single parent families;
- Change in lifestyle trends – growth in walking and cycling, an increased interest in art and culture and a continued interest in health and the environment will generate demand for specialist products and experiences which add value to the holiday;
- Fragmentation of the market place, with people seeking leisure experiences identified by lifestyle and interest groupings rather than defined by class of family;
- Growth in disposable income and leisure spending, generating additional demand for higher quality products and services;
- Slower growth in holiday entitlement than was experienced in the 1980s and 1990s meaning that a greater proportion of the population will be 'money rich but time poor';
- Fall in the cost of international travel;
- Increasing traffic congestion and measures to control car use may affect the pattern of day trips and short breaks;
- Developments in communications and IT, particularly the Internet, will become increasingly important in distributing information and facilitating booking and reservations; and
- Introduction of the Euro and its performance against the pound will affect the balance of tourism trips within Western Europe.

5.4.2 At the national level it is predicted that there will be a future growth in both the domestic and overseas markets. In the medium term the growth in the overseas

market is likely to be greatest from mainland Europe. However, good access to the main points of entry is vital.

5.4.3

In the domestic market growth is anticipated from additional holidays, short breaks, and business tourism. Such trends may affect the Eastern part of the region most, due to its easier access to markets in London and the South East.

6 Consultation

6.1

Introduction

6.1.1

This Chapter discusses, in brief, the key issues arising from discussions with Local Authorities. The issues common to all authorities as well as the particular issues raised by each authority highlighted are summarised. A full report of the issues raised in discussion with Local Authorities is presented in Appendix B of this report.

6.1.2

This Chapter also presents a summary of the key tourism issues raised during the wider SWARMMS consultation. The issues raised at sessions are reported in full in Appendix C of this report.

6.2

General Issues

6.2.1

The issues raised by Local Authorities regarding tourism and transport were varied and dependent largely on local circumstances and local context. However, some concerns/issues were common to all Local Authorities. These are summarised below:

- The difficulty of providing tourists and visitors with information relating to public transport was a concern echoed by all. Information needs to be made available before people leave home so that they are encouraged not to use the car;
- The cost of train travel is a crucial factor in determining mode choice for tourist/leisure trips. The cost of train travel is often prohibitive, especially for families;
- The cost of travel by train on Fridays, together with disrupted services on Sundays due to engineering work, often means that train travel is not appropriate for short weekend breaks;
- The quality and experience of public transport is important. Alternative modes of transport need to be made as comfortable and as convenient as travelling by car;
- There is a need for flexible and easy to understand ticketing systems for public transport. In particular there is a need to develop more advanced systems of through ticketing and inter-modal ticketing;

- Public transport needs to be made part of the holiday experience if visitors and tourists are going to be encouraged to use it as an alternative to the private car;
- Users need to have confidence in public transport. Clock face services are important as they are easy to understand and give reassurance to the user. Real time displays can also help to build confidence in the user;
- Accommodation providers can help to encourage holidays without the car by providing a meet and greet service at rail and coach stations;
- There is a need to encourage tourist attractions to offer reduced prices for visitors arriving by public transport.
- Attractions should be encouraged to develop Travel Plans;
- The South West has many attractive paths/routes for walking and cycling. There is therefore great potential to encourage car free tourism;
- Signposting and the provision of information at 'gateways', in particular, coach, train and bus stations is important; and
- Coach travel is often seen as slow and unreliable. Whilst coaches are important to the price sensitive end of the market they are an unattractive mode of transport for many other groups.

6.2.2 The over-riding message from Local Authorities is that there is no single solution to the problem of dealing with traffic created by tourism. The need to tailor solutions and initiatives to local circumstances is crucial.

6.3 ***Cornwall County Council***

6.3.1 The following issues were raised by Cornwall County Council:

- With 90% of visitors arriving by car, and 42% of all visitors originating from London and the South East, conditions on the A30/A303 corridor are important to the tourism industry;
- Cornwall is increasingly popular as a short break destination. This means that travel time is important. The car is seen as the quickest and most convenient mode of transport;
- If more visitors are to be encouraged to travel by train a variety of improvements to rail services and infrastructure are required;
- Encouraging the use of more sustainable forms of transport for trips around the County (car free days out whilst on holiday) is a priority;
- Branch lines and 'branch line buses' are seen as offering attractive services to tourists; and

- Currently only a small percentage of visitors arrive by air. However, there is significant potential for growth in this market.

6.4

Devon County Council

6.4.1

Devon County Council identified the following issues as most important:

- Many schemes/initiatives are already underway to encourage visitors to take days out by public transport, rather than by car. The Dartmoor and Tamar Valley Rover ticket has been particularly successful in this respect with usage doubling in the five years since the ticket was introduced;
- Marketing of public transport is important. Devon has recently renamed and redesigned the county bus timetable in an attempt to make it more interesting and attractive to visitors; and
- Ensuring that basic public transport services are in place is a clear priority. Alternatives, such as motorail or hire car are considered to offer few benefits, largely due to their high cost.

6.5

North Somerset Council

6.5.1

North Somerset Council identified the following issues:

- Weston-super-Mare is primarily a car orientated destination. For many this is the reason that they choose to visit;
- Rail improvements, whilst sought primarily to meet the needs of commuters, would also have potential benefits for the tourism industry; and
- Links to South Wales/Cardiff and the Midlands are important.

6.6

Bath and North East Somerset Council

6.6.1

The following issues were identified of particular importance in Bath and North East Somerset:

- With Bath in particular attracting a greater number of overseas visitors than other parts of the South West links to airports are crucial. However, public transport links to Bristol International Airport and to a lesser extent Heathrow, are in need of improvement;
- Many overseas visitors to Bath use the Brit Rail pass. This should be made available to UK residents;
- Variable message signing and additional park and ride sites could be beneficial to visitors arriving by car; and

- Bath often becomes congested during school holidays. The October 2001 half-term was staggered over a three week period. This led to less congestion than had been experienced in previous years.

6.7

Plymouth City Council

6.7.1

The main issues raised by Plymouth City Council were:

- European funding is sometimes difficult to obtain for transport projects. It is perceived that additional funding could be obtained if the tourism/economic benefits of projects were emphasised. There is a clear need for more joined up thinking;
- The development of a 'smart card' that could be used on public transport, in shops and at attractions could be beneficial to tourists;
- Visitors should be directed to 'reception points' on either side of the City; and
- Poor rail links create the perception that Plymouth is remote and difficult to get to. This has significant impacts for business and conference trade.

6.8

Consultation Workshops

6.8.1

Brainstorming sessions focused on tourism issues were held during the November 2001 round of SWARMMS stakeholder consultation. The comments raised at these sessions can be found in full in Participation Report No. 4 – Local Workshops November 2001.

6.8.2

The main messages arising from these discussions were, in brief, as follows:

- Public transport information needs to be easier to understand and should be more readily available, so that journeys can be planned in advance;
- Public transport should be made cheaper (particularly for families), so that the cost of buses and trains becomes cheaper than motoring;
- The carriage of luggage is difficult on public transport, and this often acts as a disincentive to the use of public transport for tourist trips;
- Facilities for cycling are poor;
- Public transport should be better, and more widely, marketed; and
- Package holidays should allow rail tickets, coach tickets and car hire to be booked at the same time as accommodation and tickets to attractions.

7 Case Studies and Best Practice

7.1 ***Introduction***

7.1.1 This Chapter highlights a number of case studies and examples best practice of tourist related transport initiatives throughout the UK. Examples have been identified both through discussion with Local Authorities, and during the course of desk-top research.

7.1.2 Details of further case studies can be found in the Transport 2000 publication 'Tourism without Traffic' (2001).

7.2 ***Visitor Travel Plans - Harewood House***

7.2.1 Harewood House, situated 6 miles from Leeds, attracts around 30,000 visitors per year. A survey of 250 visitors conducted in 2000, showed that between 80 and 90 per cent of visitors arrived by car. However, almost half said that they would change to other modes of travel if alternatives were in place. The main reasons for using the car were convenience, flexibility and the perceived lack of alternatives. Direct routeing was cited as the factor that would most encourage greater use of public transport. Better interchange, better information and cost incentives would also help to encourage people to travel by alternative modes.

7.2.2 The Leeds and Harrogate bus provides a 20-minute service (30-minute intervals on Sunday) to the main gate. This service connects with local buses in North Leeds. Additional connections are possible by using rail to Leeds or Harrogate and there is also a rural bus service operating from Thursday to Sunday. The house is also accessible using footpaths and bridleways. However, these potential access routes were originally neither geared to encouraging travel to Harewood House nor widely known.

7.2.3 Harewood House was selected by Transport 2000's Easy Arrivals project to develop a visitor Travel Plan. This proposed a broad package of methods to promote 'green' travel to existing visitors and car free initiatives for new visitors. Travel Plan initiatives include:

- Leaflets, website and other promotional material to emphasise the availability and benefits of non-car travel;

- Information about public transport to be included on leaflets, website, and newsletters;
- Special offers for car-free travel to be made through radio and newspapers;
- Public transport packages for special events;
- Accommodation packages to be developed including public transport to/within the area and admission;
- Liaison with service providers to encourage discount arrangements, small group discounts, family bus cards, rail day trip packages, targeted promotion to households without a car, and special offers of free bus transport;
- Investigation of new bus services to increase the number of people with direct access and to create new opportunities for arrival by rail and connecting bus;
- Improvements to interchange between the No. 36 bus to Harewood and other bus/rail services;
- Long term review of interchange at Leeds station, in conjunction with station reconstruction;
- Development of a management plan for walking and cycling on the Harewood Estate to include a review of cycle links from urban areas, and incentives to walking and cycling;
- Development of a 'multi-modal corridor' between Leeds and Harewood to include walk and cycle routes and support from a mini-bus with bike trailer;
- Development of a buggy shuttle service to transport visitors arriving by public transport to the house (the house is one mile from the main road); and
- Provision of safe storage for belongings and secure parking for cycles and motorcycles.

7.2.4 Leeds City Council tourism and transport departments, the bus companies and Metro Public Transport Executive are all working with Harewood House to implement the Travel Plan.

7.2.5 During the 2001 season a half price discount was offered to people arriving by bus. As a result the number of visitors travelling by bus, was double that in 2000.

7.2.6 This is a useful example of the development of a Travel Plan that, when fully implemented, has potential both to attract new visitors and encourage more

sustainable forms of transport. Key benefits are wider marketing of the attraction without the need to increase parking. New groups of visitors have been, or will be, made aware of the accessibility of the site, including households along the bus routes, walkers and cyclists, while the impact of traffic will be contained.

7.3

Package Holidays – Superbreak

7.3.1

Superbreak offer package holidays, including accommodation and rail travel, throughout Britain. Rail inclusive packages are available to all destinations and can be booked and paid for simultaneously. The Superbreak brochure includes information about rail fares to major destinations based on zones (information about rail inclusive packages to other destinations is available via the reservation call centre). For each hotel distances to the nearest rail stations are advertised.

7.3.2

Free or half price train travel is offered to children under 16 depending on the accommodation package booked and the number of adults staying.

7.3.3

Accommodation, travel and attraction packages are also available.

7.4

Rail/Bus Integration – The Helston Branch Line

7.4.1

The project, launched in March 1999, provides a bus service (T34) linking Redruth railway station to Helston and RNAS Culdrose. The service is fully integrated with rail services at Redruth and therefore acts as a ‘branch line’. It is a useful example of an initiative that meets the needs of both tourists and residents of rural areas.

7.4.2

Notable features of the Helston Branch Line include:

- The service operates from a special area , ‘Platform 3’ adjacent to the main entrance of Redruth Station;
- Buses wait 10 minutes for late running trains;
- Buses are specially designed with a distinctive livery;
- Buses have extra luggage space;
- Cycles racks are provided on the back of the buses;
- Buses have a family seating area and childrens toys are provided; and
- Through ticketing is available between rail and bus.

7.4.3

The project has been developed through a quality partnership approach between Cornwall County Council, Truronian, the Countryside Agency, Railtrack, Wales and West (now Wessex), First Great Western and Virgin Trains. A partnership

funding scheme includes grants from the Countryside Agency, The European regional Development Fund and Rural Bus Challenge.

7.5

Rail/Bus Integration – The Eden Branch Line

7.5.1

Truronian's T9 service, the 'Eden Branch Line' connects with trains at St. Austell Station. Combined bus and entrance tickets can be purchased on the bus. Buses are designed to carry bicycles. This is a good example of a way in which attractions and transport operators can work together to provide an efficient and appealing service for tourists.

7.5.2

Between April and November 2001, around 14,000 Eden visitors arrived by Truronian bus services (around 1% of all visitors). 58% of these visitors arrived via St. Austell station on the Branch Line bus.

7.6

Ticketing – The Dartmoor and Tamar Valley Sunday Rover

7.6.1

The Dartmoor and Tamar Valley Sunday Rover has been successfully operating since 1991. This has been made possible through a partnership of Devon County Council, the Devon and Cornwall Rail Partnership and Dartmoor National Park Authority.

7.6.2

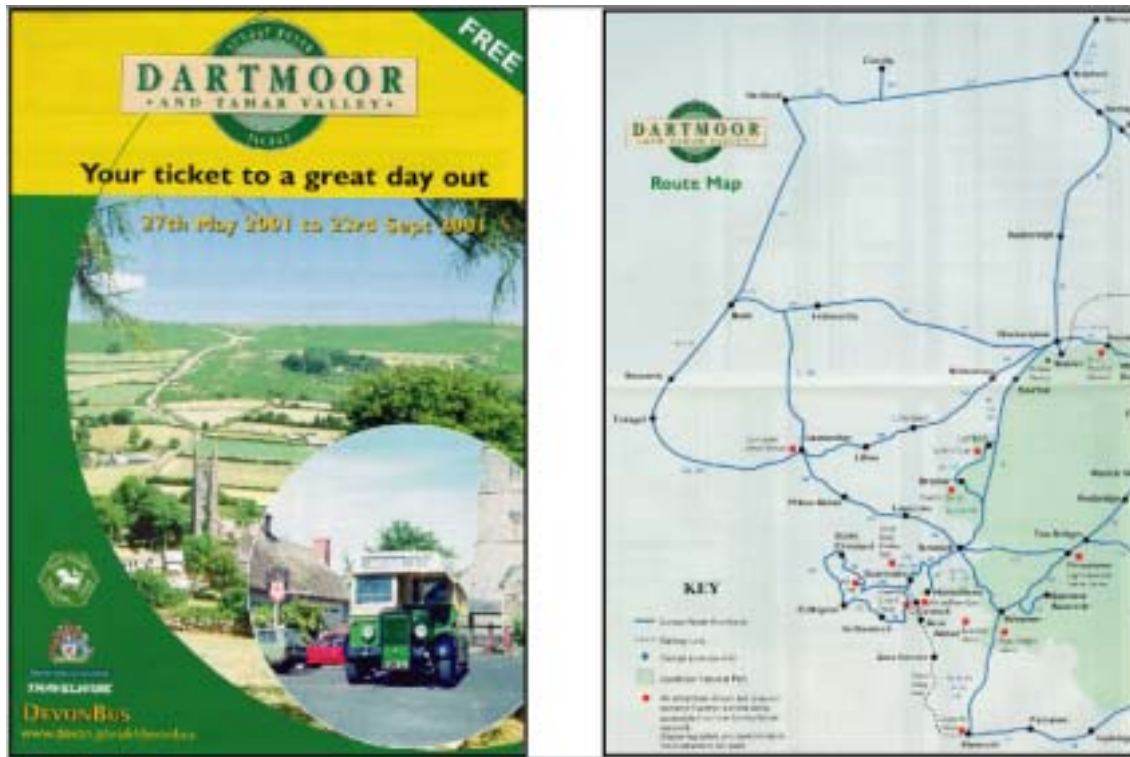
The Rover network started as one ticket that allowed visitors to explore Dartmoor using the Tamar Valley railway line and a small network of connecting buses. However the network has gradually expanded to cover all of Dartmoor and the surrounding Tamar Valley area. The Sunday Rover ticket is now valid for journeys onto Dartmoor by bus from Plymouth, Okehampton, Exeter, Tavistock and Newton Abbot as illustrated in Figure 7.1. It is also valid on trains between Plymouth and Gunnislake and on the Tamar Valley Line. It can also be used on Plymouth City bus services between the rail and bus station. Guided walks are available from bus stops and are free for bus users.

7.6.3

In 1998 the Sunday Rover saw a surge in demand with the opening of the Exeter to Okehampton Dartmoor Train Line and the refurbishment of Okehampton Station, buffet and model railway shop. During the same year the Sunday Rover received a National Bus Industry Award in recognition of it being a model of best practice in public transport marketing. In 2001 the Sunday Rover became available for the first time all year round with the introduction of the Winter Sunday Tamar Valley Line service.

7.6.4 In summer 2001, surveys revealed that 50% of passengers questioned had access to a car and that 36% of passengers were on holiday in the area. The network is continuing to expand each year with the introduction of enhanced services and destinations offering more opportunities and choice.

Figure 7.1 - The Dartmoor and Tamar Valley Sunday Rover



7.7 ***Ticketing - BritRail Pass***
 7.7.1 BritRail Passes allow unlimited travel by rail. A variety of ticket types are available. The BritRail Classic Pass is valid for travel on 4, 8, 15, 22 consecutive days or 1 month. The BritRail FlexiPass allows the permit holder to choose the travel days within a set period of time. Passes are available for 4 days travel in 2 months, 8 days travel in 2 months and 15 days travel in 2 months. However, BritRail passes are only available to non-UK residents.

7.8 ***Ticketing – ScotRail (Freedom of Scotland Travel Pass)***
 7.8.1 ScotRail, the main train operator in Scotland offers tourist focused ticketing in the form of a 'Freedom of Scotland Travelpass'. This gives unlimited travel on all

scheduled train services within Scotland, all Caledonian MacBrayne scheduled ferry services, various Scottish Citylink services and the Glasgow underground. In addition, the Travel Pass offers discounts on P&O Ferry services, Sleepers, City Bus Tours and Edinburgh buses.

7.8.2 Passes are valid for either any 4 out of 8 or 8 out of 15 consecutive days. Prices vary depending on season, with a 4 day pass costing between £69 and £79 and 8 day pass costing between £89 and £99. These are available from all staffed railway stations throughout Britain and rail-appointed travel agents and from the Britain Visitor Centre, Regent Street, London. They are also available overseas from BritRail offices in Europe and North America.

7.9 ***Public Transport Information – PTI2000/Traveline***

7.9.1 PTI 2000 is the result of the Government's commitment, in the Transport White Paper 'A New Deal for Transport: Better for Everyone', to set up a national public transport information system. The White Paper recognised that, although operators have improved passenger information, its quality still varies across the country, being quite good for rail journeys, variable for bus journeys, and poor in most areas of a combined bus and rail journey.

7.9.2 PTI 2000, a partnership between DTLR (formerly DETR), Local Authorities, and public transport operators, aims to encourage more use of public transport, through the provision of better information. A national information service has been developed based on:

- A network of local services from local information partnerships comprising Local Authorities and operators combining their resources to provide information services for local journeys by all modes in each area; and
- The existing network of information services such as those provided by National Rail Enquiries and National Express.

7.9.3 The initial specification for the service differentiated between initial minimum, desirable and optional requirements. A telephone service, offering information via a common number at a national rate, followed later by an Internet based system and the ability to fax/e-mail or mail details on request was proposed. Travel centres and self service terminals were identified as optional.

7.9.4 The ability to provide information regarding bus, coach, national railways, tram/metro/underground, and local ferry was stated as an initial requirement. It was hoped that information regarding journey itineraries, timetables, fares and ticketing and so on would be available early in the project and that further information, such as facilities at start/interchange/end point, facilities on vehicles and arrangements for people with disabilities would be available later. Information on internal flights, taxis and community transport was identified as desirable.

7.9.5 So far, the PTI 2000 project has resulted in the provision of a national public transport information telephone number (Traveline), dealt with by regional call centres. A web based facility is also available (www.traveline.org.uk), although this is still under development in some areas. These facilities offer significant potential to increase awareness about public transport.

7.10 ***Public Transport Information – Personalised Bus Maps***

7.10.1 Recent studies have shown that individualised marketing can have significant benefits in encouraging people to use public transport. Research commissioned by Nottingham City Council in 1999 showed that many non-users of buses were put off because of the lack of simple, user-friendly information. The study showed that residents were often unsure where bus stops were, where to stand, or where to alight on a return journey.

7.10.2 In order to provide information in a more easy to understand format Nottingham City Council plan to issue personalised public transport information to their own staff and also those of other major employers. For a given address, or postcode, public transport maps can be produced that show the location of bus stops within walking distance, information on the buses that stop there, frequency of service, and so on.

7.10.3 The level of uncertainty reported in the Nottingham study shows that many people, even in their local area, do not understand the way that the bus systems operate. This project therefore represents an innovative approach towards promoting a greater understanding of public transport.

7.10.4 Further information of initiatives of this nature can be found in the 'Reducing Growth in Travel Demand' Plan.

7.11 ***Car-Free Days Out***

7.11.1 The Devon and Cornwall Rail Partnership, set up in 1991, covers five branch lines in the two counties. The partnership's core partners are Devon County Council, Cornwall County Council, Plymouth City Council, University of Plymouth and Wales and West Trains (now Wessex). These partners fund the office and staff. The money provided by these partners is used to attract match funding from other sources. For example, between 1997 and 1999 the rail partnership received match funding from the European Regional Development Fund. Other sources of funding have included the Regional Development Agency and the Countryside Agency.

7.11.2 The Devon and Cornwall Rail Partnership have produced 'Days Out' leaflets from Looe and Newquay for several years. In 2001, assisted by additional funding from Wales and West Trains (now Wessex) leaflets were also produced for days out from Torbay, Barnstaple, Truro, Falmouth, and Penzance/St. Ives.

7.11.3 The leaflets detail possible days out by train from each of the different starting points. They give information about the places that can be visited, suggest activities in each destination, and provide timetable and fare information.

7.11.4 For example, the leaflet 'Days out from Plymouth' shown in Figure 7.2 Suggests a number of activities, gives details of where to change and provides both outbound and return timetable information.

7.11.5 In 2001, 560,000 of these leaflets were produced at cost of around £30,000. 315,000 leaflets were distributed to residential properties and 74,000 were distributed to hotels and guest houses via a marketing company. Tourist information centres and rail stations are supplied with leaflets.

7.11.6 Immediately following distribution of the Plymouth leaflet in 2000, passenger numbers on the Tamar Valley line increased significantly. For example, passenger numbers on the Sunday after the distribution of the leaflet were 200 higher than on Sunday before the distribution.

7.11.7 The rail partnership also produces public transport 'discovery maps', line guides, and scenic railway leaflets. In 2000 400,000 public transport discovery maps were produced. 250,000 of these were distributed through a marketing company, 80,000 by Wessex Trains and 11,000 by retail outlets. Around 1,500 leaflets were sent abroad as a result of requests. The total cost of this initiative was around £57,000.

7.11.8

Between 1997 and 1999 the rail partnership received funding from the European Regional Development Fund. During this time there was a 19% increase in tourism and leisure journeys on the five branch lines in Devon and Cornwall. The Truro to Falmouth line showed the biggest increase, from 135,000 journeys in 1996 to 169,000 journeys in 1999.

Figure 7.2 – Days Out by Train

The figure consists of four promotional leaflets for train services:

- Dartmoor Sunday Rover:** Promotes a Sunday service to Dartmoor National Park. It includes a photo of a train and a table of fares.
- Tamar Valley Sunday Rover Trips:** Promotes Sunday trips to the Tamar Valley. It includes a photo of a child and a table of fares.
- Days Out from Plymouth:** Promotes leisure trips from Plymouth to the Tamar Valley and Dartmoor. It includes a photo of a bridge over a river and the text "Wales & West".
- TAMAR VALLEY LINE Leisure Timetable Fares:** A detailed fare table for the Tamar Valley Line, including sections for "Foot and Mouth Disease" and "Return Fares".

7.12

Cycle Tourism – Country Lanes

7.12.1

Country Lanes (www.countrylanes.co.uk) provides cycle touring holidays, day trips and cycle hire in the Cotswolds, the New Forest and the Lake District. In recent years Country Lanes has won several awards for its operations, including the English Tourist Board Green Award for Tourism and Environmental Management in 1998 and the British Airways Tourism for Tomorrow award in 1999. In 2001, Country Lanes was also awarded the Cycle Mark Award by the Strategic Rail Authority.

7.12.2

Country Lanes embraces the concepts of sustainable tourism and integrated transport. Based at rural railway stations, Country Lanes provides a variety of packages and cycle hire options to suit a range of budgets and levels of ability. Cycling holidays, with accommodation in luxury country hotels and local bed and breakfasts are provided in the form of either supported group tours or self guided itineraries. Luggage delivery, direct to accommodation, is provided as part of the package price. Cycle hire for shorter trips is also available. Route maps are provided for customers and are also available via the Country Lanes web site.

7.12.3

Several of the Country Lanes outlets operate from refitted railway carriages and all outlets are based in station car parks thus, for customers arriving by train, offering an integrated package. Country Lanes has been successful in working in partnership with many of the train operating companies, including Virgin Trains, South West Trains, North West Trains, and Thames Trains. For example, Virgin Trains provides a through ticket for travel by train and bicycle in the Lake District and in partnership with South West Trains, Country Lanes provides a one-day get away in the New Forest.

8 Recommendations for Longer Distance Travel into the South West

8.1 *Introduction*

8.1.1 This Chapter presents, and seeks to justify, a series of recommendations addressing tourism to be taken forward as part of the SWARMMS strategy. It focuses on the:

- Longer distance journey from home into the South West via the primary transport corridors; and
- Secondary, shorter distance journeys linking the terminus of the primary transport corridor with the tourist destination.

8.1.2 The recommendations aim to address the problems and issues raised by Local Authorities and other stakeholders during the consultation work undertaken during the course of the SWARMMS study as well as the issues raised by the desk top research.

8.1.3 The main focus of this Chapter is on ways of encouraging people visiting the South West to travel into the region by means other than the private car. The overall aim of the recommendations presented is therefore to make public transport more attractive and more acceptable for longer distance tourist based trips. The recommendations therefore seek to encourage modal shift.

8.1.4 The recommendations are not intended to prevent tourists from accessing holiday destinations in the South West by car. Rather, the recommendations aim to address some of the features of public transport that make it an unattractive alternative to the car for leisure trips to the South West, and therefore create an environment in which more people will be encouraged to choose to travel by more sustainable means.

8.1.5 It is important to note also that recommendations regarding public transport improvements for longer distance journeys are important in allowing people without access to a car to travel to, and holiday in, the South West.

8.2

Tourist Journey Scenarios

8.2.1

The high costs of public transport, as compared to the cost of the same journey made by the private car, is often cited as an important reason dictating the mode of travel used for tourist based trips. The inconvenience and uncertainty of interchange are also often perceived as disincentives to the use of public transport. To a lesser extent, length (time) of journey is also significant.

8.2.2

As a means of illustrating these issues various 'popular' or potentially frequent use route scenarios were investigated to identify the differences in time, cost, and ease of travel between key destinations in the South West for different groups. The routes chosen were:

- Reading to Newquay;
- Bristol to Plymouth;
- Bath to Truro;
- Salisbury to St. Ives; and
- Weston-super-Mare to Swindon.

8.2.3

For each route, the cost of travel by a variety of modes was calculated. The modes considered were:

- Coach;
- Train; and
- Car.

8.2.4

Each journey was considered for a series of different groups. These were:

- One adult travelling alone;
- 2 adults travelling together; and
- A 'typical' family group of 2 adults travelling with 2 children between the ages of 5 and 15.

8.2.5

By using these specific groups of traveller for each scenario a general overview of different travel behaviour for tourist, day trip and family outings can be investigated.

8.2.6

Details of coach travel were obtained from The National Express web site. In each instance a standard return was the chosen fare type because it is often the easiest ticket to purchase and can also be purchased on the coach or at the

departing coach station at the time of travel. This was the cheapest mode of travel in each scenario for one adult travelling alone. In each case the fastest and most simplistic journey was chosen for comparison with other modes.

8.2.7 Rail journeys were selected using 'The Train Line' web site www.thetrainline.com. Where promotions were available supersaver and value advance returns were considered and for other scenarios saver returns were used.

8.2.8 Travel between destinations by car was assessed using Auto Route to give mileage and an estimated journey time. In all cases the cost of each return journey was calculated initially taking into account only fuel costs (69 pence per litre). Secondly, the cost was calculated according to the 35p per mile the mileage rate set by the DTLR (which allows the cost of road tax, car insurance and wear and tear to be included, in addition to the cost of petrol).

8.2.9 Tables 8.1 shows the results of this exercise.

Table 8.1 – Sample Tourism Journey Scenarios

Reading to Newquay - Return								
Sat 01 - Fri 14 Dec 2001	Time Outbound	Time Inbound	Ticket type	Changes Out	Changes In	Cost = 1adult	Cost = 2 adults	Cost = 2 adult + 2 child (5 - 15 yrs)
National Express	5hrs 30 mins	5hrs 30 mins	Stand Rtn	0	0	£42.50	£85.00	£127.50
The Train Line	4hrs 46 mins	5hrs 48 mins	Sup Adv Rtn	1	2	£47.00	£94.00	£141.00
The Train Line	4hrs 46 mins	5hrs 48 mins	Saver Rtn	1	2	£63.70	£124.40	£191.10
Car Auto Route	4hrs 42 mins	4hrs 42 mins	Fuel	239 miles each way			£48.00 fuel only - return journey of 478 miles	
			DTLR Rate					£167.00

Bristol to Plymouth - Return								
Fri 30 Nov - Sun 2 Dec	Time Outbound	Time Inbound	Ticket type	Changes Out	Changes In	Cost = 1adult	Cost = 2 adults	Cost = 2 adult + 2 child (5 - 15 yrs)
National Express	3hrs 5 mins	3 hrs 20 mins	Stand Rtn	0	0	£28.50	£57.00	£85.50
The Train Line (Virgin)	2hrs 13 mins	2hrs 50mins	Value Adv Rtn	0	1	£20.00	£40.00	£60.00
The Train Line (Virgin)	2hrs 13 mins	2hrs 50mins	Saver Rtn	0	1	£37.10	£74.20	£111.30
Car Auto Route	2hrs 34 mins	2hrs 34 mins	Fuel	119 miles each way			£24.00 fuel only - return journey of 238 miles	
			DTLR Rate					£83.30

Bath to Truro - Return								
Sat 22 - Fri 28 Dec	Time Outbound	Time Inbound	Ticket type	Changes Out	Changes In	Cost = 1adult	Cost = 2 adults	Cost = 2 adult + 2 child (5 - 15 yrs)
National Express	6hrs 30mins	7hrs 5mins	Stand Rtn	1	1	£43.20	£86.40	£129.60
The Train Line (Virgin)	4hrs 7mins	3hrs 59mins	Saver Rtn	2	1	£47.70	£95.40	£143.10
Car Auto Route	3hrs 54mins	3hrs 54mins	Fuel	118 miles each way			£38.00 fuel only - return journey of 376 miles	
			DTLR Rate					£82.60

Salisbury to St Ives - Return								
Sat 5 - Sat 12 Jan 2002	Time Outbound	Time Inbound	Ticket type	Changes Out	Changes In	Cost = 1adult	Cost = 2 adults	Cost = 2 adult + 2 child (5 - 15 yrs)
National Express	8hrs 30 mins	8hrs 45mins	Stand Rtn	1	1	£44.00	£88.00	£132.00
The Train Line (Virgin)	6hrs 8mins	5hrs 9mins	Sup Saver Rtn	2	3	£55.70	£111.40	£146.70
The Train Line (Virgin)	6hrs 8mins	5hrs 9mins	Saver Rtn	2	3	£55.70	£111.40	£167.10
Car Auto Route	4hrs 55mins	4hrs 55mins	Fuel	154 miles each way			£31.00 fuel only - return journey of 308 miles	
			DTLR Rate					£107.80

Weston Super Mare to Swindon - Return								
Sat 5 - Sat 12 Jan 2002	Time Outbound	Time Inbound	Ticket type	Changes Out	Changes In	Cost = 1adult	Cost = 2 adults	Cost = 2 adult + 2 child (5 - 15 yrs)
National Express	6hrs 15mins	5hrs 10mins	Econ Rtn	1	1	£11.00	£22.00	£33.00
The Train Line (Virgin)	1hr 6mins	1hr 25mins	Super Sav Rtn	0	1	£16.00	£32.00	£48.00
The Train Line (Virgin)	1hr 6mins	1hr 25mins	Saver Rtn	0	1	£19.30	£38.60	£57.90
Car Auto Route	1hr 13mins	1hr 13mins	Fuel	62 miles each way			£13.00 fuel only - return journey of 124 miles	
			DTLR Rate					£43.40

- 8.2.10* In each case, the time taken to make the timetabled journey by train compares very closely with the estimated time to drive. However, in most cases interchange is required, often twice or three times. More important perhaps, are the findings relating to cost.
- 8.2.11* The costings based on the DTLR rate show that, when the additional costs of running a car are factored into the cost of making a journey, the cost of motoring is actually more comparable with the cost of rail fares than is often perceived. In each of the sample journeys considered, the cost of 2 people travelling by train is approximately the same as the full cost of driving the equivalent journey. However, even when all running costs are taken into account it still tends to be cheaper for a family of 4 to drive to holiday destinations in the South West than take the train.
- 8.2.12* However, studies show that most people do not factor the running costs of motoring into their calculations of journey cost. Instead, the cost of public transport tends to be compared to the cost of the petrol required to make the equivalent journey by car. Table 8.1 shows that, when considered in this way, train fares are almost always more expensive than fuel, even when one person travels alone.
- 8.2.13* The cost differential is even greater when the cost of a family travelling by train is considered. In each case, even based on the cheapest available rail fares, the cost of taking a family of 4 by train is around/more than three times as much as making the equivalent journey by car (fuel cost only).
- 8.2.14* The cost of travelling by coach tends to compare more favourably with the cost of motoring. In each case the cost of fuel is less than/approximately the same as one adult travelling by National Express coach. However, whilst the cost of a family travelling by coach tends to be less than the equivalent journey by rail, it is still around three times more expensive than the fuel cost of the same journey. When the full cost of motoring is considered it is evident that in many cases there are savings to be made by travelling by coach – this is not case by train.
- 8.2.15* Coach travel, also suffers from the additional disincentive of (in most cases) a much increased journey time. Comparison of the coach and car journey times shows that, at the East the coach takes 46 minutes longer. Some journeys may take an additional 3 hours.

8.2.16 The coach/rail journey scenarios presented consider journey time and cost from origin to destination station only. It is important to note that other costs are likely to be incurred and journey time increased as a result of travelling between home and the station and the station and the final holiday destination. The inconvenience of additional interchange and uncertainty regarding the availability of public transport at the destination are important factors and are often crucial in determining the mode of transport used for the whole journey and should therefore not be overlooked.

8.2.17 Also, it is important to note that the travel times for car journeys are based on average journey lengths. During the summer months and at peak times congestion may make journeys longer (and therefore more expensive). Whilst this uncertainty may encourage some to consider other modes it is less influential for tourists than for other groups. Often tourists are more flexible in their travel requirements therefore, rather deterring them from using the car, congestion instead encourages them to time their journey to avoid being held up (often leaving early in the morning or late at night). However, with short/weekend breaks becoming increasingly common, travel time is increasingly at a premium.

8.2.18 National Travel Survey statistics show that for journeys up to 350 miles in length the car remains the dominant mode of travel accounting for, on average, 80% of trips. For journeys between 250 and 350 miles travel by bus/coach, rail and air becomes more popular. However, significant mode shift is not seen until journey lengths increase significantly. For trips over 350 miles, whilst remaining the dominant mode of transport, the car becomes less popular (46% of trips), with more journeys transferring to rail and coach. Table 8.2 illustrates this pattern.

Table 8.2 - Long distance trips within GB by mode and length (%)

Distance	Car	Bus/ Coach	Rail	Air	Other
50 to under 75 miles	86	4	8	-	2
75 to under 100 miles	85	5	8	-	2
100 to under 150 miles	83	7	8	-	2
150 to under 250 miles	80	7	10	1	2
250 to under 350 miles	69	12	13	4	2
350 miles and over	46	9	20	22	3

Source: National Travel Survey 1998/2000 Bulletin

8.2.19 The results of the travel journey scenario exercise provide some explanation of this pattern. Table 8.1 shows that it is only for the longest journey that the full cost of

motoring (DTLR rate) begins to be more comparable with the cost of rail travel. With little differential in this cost, together with the length of time taken to drive, public transport begins to become more attractive. Given that few people tend to account for running costs in pricing a journey by car, it seems that the distance/time to drive is the crucial factor.

8.2.20 Within the SWARMMS study area the distance threshold needed to encourage people to think more seriously about alternative modes of transport is unlikely to be crossed.

8.3 **Road**

8.3.1 The recommendations made by other elements of the SWARMMS strategy (in particular the London to Exeter, London to Bristol and Bristol to Exeter Corridor Plans) in respect of highway improvements, notably to the A303/A358/A30 corridor, will have significant benefits for the tourist industry. They will particularly help to improve journey time reliability. These factors are important given that, whilst there is clear scope to encourage the use of other modes of travel for tourism trips, the private car will remain the primary mode of travel for many trips.

8.3.2 Other recommendations made in the Corridor Plans are also likely to have benefits for tourists. For example, the Corridor Plans include new climbing lanes and improved communication systems on the trunk road network.. Such measures will help to maintain the smooth flow of traffic during periods of high demand.

Alternative Routes

8.3.3 Whilst most issues relating to highways are dealt with by other Plans there is scope within this report to consider the routeing of tourist traffic away from the main strategic network.

8.3.4 One such opportunity exists with the A361/A39 in Devon and Cornwall. Leaving the M5 at Junction 27, the A361/A39 routes via Barnstaple, Bude, Camelford and Wadebridge, rejoining the A30 at Fraddon, thus provides an alternative route to the M5/A30 corridor.

8.3.5 A report published in October 2001, commissioned by the North Devon Economic Partnership, details a marketing strategy for the route with a key objective to develop the route to benefit the tourism destinations it serves. These destinations are in the Mid Devon, West Somerset, Exmoor, North Devon,

Torrige, North Cornwall and Restormel administration areas. The marketing strategy aims to:

- Enhance the enjoyment of visitors using the route; and
- Raise awareness of leisure opportunities served by the route.
- It is hoped that this will result in:
 - Creating an attractive image for the route;
 - Reinforce images of destinations along the route;
 - Encourage new and return visits;
 - Enhance visitor enjoyment;
 - Lengthen visitor stays;
 - Spread vehicle loads; and
 - Generate economic activity.

8.3.6 The marketing strategy proposes that the A361/A39 route should provide a hierarchy of facilities for motorists and visitors. This includes the following facilities, some of which will be essential, some desirable and some value added:

- Lay-bys - essential pull ins
- Pit stops - essential for fuel and other services
- Country parks - desirable as picnic and rest areas with toilets/catering
- Gateways - value added offering a visitor experience

8.3.7 Whilst it is unlikely that alternative routes such as the A361/A39 would have a significant impact (in terms of reducing traffic volumes) on the M5/A30 it is nonetheless important that such routes are advertised as they provide route choice and help to spread the economic benefits to tourism to other parts of the region.

8.3.8 In respect of highways the following recommendation is therefore made:

- > *Promote the A361/A39 as an alternative route for tourist traffic; and*
- > *Investigate the potential for creating/advertising further routes of this nature.*

8.4 ***Rail***

Cost/Ticketing

8.4.1 If tourists are to be encouraged to use public transport it is important that cost differentials between car travel and rail travel are addressed. Indeed, it is unlikely that anyone with a car available would choose to take their family on holiday by train when the cost is typically more than double that of motoring.

- 8.4.2 The railways in the SWARMMS area are covered by the scheme of national railcards. These include:
- Young Person's Railcard
 - Senior Railcard
 - Family Railcard
 - Network Railcard
 - Disabled Railcard
- 8.4.3 Whilst these railcards offer substantial savings to be made on the cost of a regular ticket, it seems unlikely that they encourage modal shift for tourist trips. Instead, they appear to offer discounts to people who would have chosen to travel by rail, for whatever reason, in any event.
- 8.4.4 However, there is evidence of substantial marketing activity by the railway companies operating services in the SWARMMS area. Seasonal promotions, group discounts, child discounts and joint travel/entry tickets are offered by most train operating companies and would seem to offer more potential to make train travel more viable for tourist trips.
- 8.4.5 Regional passes are also now available. For example, the Devon Railcard, shown in Figure 8.1, publicised by Wessex Trains at an introductory price of £5 (normal price £10) offers a third off standard class leisure fares in Devon.
- 8.4.6 The Brit Pass (detailed as a case study in Chapter 7) is available to overseas residents and allows unlimited travel by rail for a set period of time. If this type of ticket were made available to UK residents, travel into (and subsequently around) the region by train for tourist purposes may be encouraged. At present, no comparable ticket type is available for travel into or around the South West region. This type of ticket would offer greater convenience, flexibility and value for money than existing ticketing arrangements. Importantly also (particularly for tourists) this type of ticket removes the confusion that is often experienced in purchasing the most appropriate ticket type.
- 8.4.7 Train travel can also be made more attractive to tourists if facilities are provided that 'add' to the journey. For example, family carriages (as shown in Figure 8.2) and activity packs for children can help to make train travel part of the holiday experience for families.

Figure 8.1 – Devon Railcard

SPECIAL OFFER! ONLY 10.00

One Third off Lowest priced In Devon with a **Devon Railcard**

Valid from 10 January 2012 to 31 March 2012

Value for Money

The Devon Railcard costs just £5 (special introductory price, normal price £10 from 2 June 2012) and offers a third off individual Standard Class tickets rail fares in Devon, trips for shopping, visiting friends or exploring the county can work out so much cheaper.

The Devon Railcard is valid for 12 months from date of issue and can quickly pay for itself.

The Benefits of the Devon Railcard

Members of the Devon Railcard are entitled to special discounted fares for the following destinations: Exeter, Plymouth, Torquay, Newton Abbot, Paignton, Brixton, and Barnstaple with the following conditions:

- One Third off Single Day Return** - valid one day on the route. It is not valid for the return. Also not valid for return on the same day.
- One Third off Seven and Fourteen Day Return** - valid one day on the route. It is not valid for the return. Also not valid for return on the same day.

One Third off Weekend Single - valid for one day on the route between the stations. It is not valid for the return. Also not valid for return on the same day.

When you travel on your Devon Railcard you can enjoy the Devon coast in Devon or explore the county's inland scenery. The best of Devon's rail routes are yours to enjoy. It's a great way to explore the county and enjoy the best of Devon.

For the best value of your Devon Railcard, please see the list of destinations below. The best of Devon's rail routes are yours to enjoy. It's a great way to explore the county and enjoy the best of Devon.

See valid in conjunction with any other Railcard.

Wessex Trains

Figure 8.2: Family Carriages

Family Values

It's not just the family that's important. It's the fun. The family carriage is a great way to enjoy the county's inland scenery. The best of Devon's rail routes are yours to enjoy. It's a great way to explore the county and enjoy the best of Devon.

Free Activity Pack

Approved members of the Family Carriage are entitled to special discounted fares for the following destinations: Exeter, Plymouth, Torquay, Newton Abbot, Paignton, Brixton, and Barnstaple with the following conditions:

Free seat reservations

For all our Family Carriage seats, we offer a special discount. It's a great way to explore the county and enjoy the best of Devon.

Family Carriage
A good choice for your family day out

First Great Western

8.4.8 Similarly, the provision of 'themed' trains or carriages should be investigated. For example, special limited services with additional luggage capacity, such as a surfers train to Newquay and trains for cyclists calling at stations close to the National Cycle Network could be provided.

8.4.9 Tourists on longer breaks are generally more flexible in terms of when they travel than other rail users. Train operating companies can therefore benefit by offering suitable fares for tourists travelling in the off-peak period.

8.4.10 However, for certain segments of the market, peak time fares are an important consideration. Weekend/short breaks are increasingly popular in the South West. For trips starting on a Friday or in the peak period (after work for many people), peak time fares are often a significant disincentive to travelling by rail. For short trips, there is often a very small 'window' in which people are prepared to travel. Indeed, people wish to get to their destination as quickly as possible to make the most of their weekend away. Often the cost of travelling on a Friday, or in the peak hour, is seen as prohibitive.

8.4.11 Given that cost is such an important factor in governing mode choice for tourists there is a need for pricing structures to better cater for the needs of the tourism industry. This could be achieved via the processes by which franchises are awarded. If franchises were dependent upon the delivery of pricing structures and services which would better cater for tourism and leisure based trips, this would create a greater potential to encourage a modal shift.

Reliability

8.4.12 Reliability is just as important for tourists as for other travellers. More importantly, if people are to be encouraged to holiday by rail they need to have confidence in the system. In recent years, problems with the availability of rolling stock and train cancellations have led to a lack of confidence in the railways. This problem is particularly acute in the South West where it is perceived that services are the first to be cut (owing to greater profit to be made in the South East) and the last to receive new rolling stock.

Timetabling

8.4.13 With the tourist industry seeking to extend the visitor seasons, and encourage visitors in the shoulder months, issues of summer/winter timetabling are increasingly important. Similarly, with the statistics showing an increase in the

numbers of visitors in the older age groups, groups who are not tied to holidaying in the typical holiday period, year round consistency in timetabling is an issue.

8.4.14 At present, differences in the seasonal timetabling, mean that many destinations are more difficult to access in the winter than they are in the summer. For example, a comparison between winter and summer timetables for the year 2000/2001 shows that whilst 14 services operated between Paer and Newquay between July and September, only 5 services were timetabled daily during the winter period (September to May). Whilst the costs of running trains with only a small number of passengers is recognised it is important that reasonably frequent services are maintained to tourist areas during the shoulder months. Ridership on these services could be increased as a result of other initiatives detailed in this report. For example, if discounts are offered to people arriving by train, or if train tickets are sold as part of a package holiday it could become more economically viable to provide year round services.

8.4.15 Return visitors are an important source of tourist revenue in the South West; therefore it is important that if people want to return to Cornwall for example, that they are able to do so with the same ease that they might have done on a previous visit, at any time of year.

Luggage

8.4.16 The difficulty of carrying luggage on trains is frequently cited as a disincentive to their use for tourist trips. If this problem is to be overcome there is a need to provide a more customer orientated service. A 'check in' service, similar to that used for air travel, could have benefits. The presence of staff to assist with loading/unloading bags and the provision of luggage trolleys would also be beneficial to tourists. Similarly, secure storage for luggage at stations is an important consideration.

Interchange Facilities

8.4.17 As noted earlier in this chapter, interchange can be a disincentive to the use of public transport for tourist trips. For families in particular, changing trains and waiting for connections can be inconvenient. The quality of the waiting environment itself is important in this respect. The provision of indoor (heated) waiting areas, toilets and baby changing facilities, refreshment stands, and so on can help to improve the experience of interchange. The provision of information

regarding connecting services is also crucial. Specific recommendations regarding interchange are presented in the following plans:

- Corridor Plan: London to Exeter;
- Corridor Plan: London to Bristol
- Corridor Plan: Bristol to Exeter;
- Corridor Plan: Exeter to Penzance;
- Area Plan: Swindon; and
- Area Plan: Bristol.

8.4.18 In addition to these recommendations there is a need to consider the needs of the tourist/leisure traveller. New interchange facilities should incorporate tourist information centres as a means of better integrating tourism and transport activities.

8.4.19 In respect of rail services in general, the following recommendations are made:

- > *Encourage train operating companies to provide further discounted tickets for tourist travel in off-peak periods*
- > *Develop initiatives to 'add' to the visitor experience, including themed trains for surfers and cyclists*
- > *Ensure greater consistency between winter and summer timetables to key tourist destinations*
- > *Investigate a means of overcoming the disincentive of peak time fares for shorter length tourist based trips*
- > *Introduce a 'check in' facility for luggage between key rail stations*
- > *Subject to direction by the British Transport Police, encourage the re-introduction of secure left-luggage facilities at rail stations*
- > *Make the Brit Pass, or similar ticket type, available to UK residents*
- > *Incorporate tourist information centres at rail stations and transport interchanges*

8.5 ***Sleeper Services***

8.5.1 The First Great Western Sleeper service, The Night Riviera, operates between London and Devon/Cornwall. One service is scheduled in each direction each evening, with the exception of Saturday (to avoid disruption by major engineering work). The service currently operates the same service during both the winter and the summer timetables.

- 8.5.2 Customers have three options regarding their travel. This can be in a First Class cabin (exclusive occupancy only), a Standard cabin (single or dual occupancy available) or seated accommodation in the Day Coaches (used for normal train services).
- 8.5.3 Sleeper berths are available between Penzance and Paddington, or between Plymouth and Paddington. On each trip a sleeper carriage is dropped off/picked up at Plymouth. This carriage can therefore only be occupied by people wishing to travel to/from Plymouth. Thus, when the Penzance carriage is fully booked, whilst there may be spare capacity in the Plymouth carriage (this is a less popular destination), there is no flexibility to accommodate additional passengers. This is a particular drawback to the occupation of sleeper berths at additional stations.
- 8.5.4 The sleeper services offers benefits for some types of tourists. By travelling overnight, particularly for short breaks, it means that more time can be spent at the holiday destination. It also provides a relaxing journey and removes the stress of driving. The service is unlikely to appeal to families but can be an attractive travel option for some other groups. The sleeper service would perhaps benefit the tourist industry more if sleeper berths were available from a wider range of stations.
- 8.5.5 Whilst details are provided in all published timetables the sleeper is not actively promoted. However, First Great Western consider the sleeper service to be fairly well used and figures show that ridership is increasing.
- 8.5.6 At present, the sleeper tends to be used for trips out of, rather than into, Devon and Cornwall. It is also often used for a single trip, with the opposite journey being made on a regular service or by an alternative mode.
- 8.5.7 First Great Western offers a free taxi transfer between Waterloo and Paddington for Eurostar customers using the sleeper service. There is an opportunity to develop further integration between these two services, perhaps by offering the opportunity to purchase a through ticket at a discounted rate. This could be marketed and thus could be beneficial to the tourist industry in terms of attracting overseas visitors, helping also to overcome the perceived peripherality of Cornwall.
- 8.5.8 Sleeper services linking the South West (in particular, Devon and Cornwall) with the north of England and Scotland could also be beneficial in attracting tourists from further afield.

8.5.9

The following recommendations are made in respect of the sleeper service:

- > *Allow for the occupation of sleeper berths at a greater range of stations on the London to Cornwall corridor and on services from the North and Midlands*
- > *Promote the sleeper as a tourist service through targeted marketing initiatives*
- > *Promote the sleeper as an option for one way travel through the provision of a linked ticket allowing travel in one direction on the sleeper and the other direction as a regular ticket*
- > *Provide joint ticketing between the sleeper service and Eurostar and promote this as a 'seamless journey' in order to encourage overseas visitors to visit the South West.*

8.6

Motorail

8.6.1

First Great Western, under franchise obligation, operates a motorail service between London and Cornwall. Cars are carried in specially adapted carriages, which are loaded/un-loaded at Paddington and Penzance. Passengers can choose to travel either in sleeper berths, first or standard class seating.

8.6.2

Motorail operates for the period of the summer timetable only. Given the aspirations of the industry to extend the tourist season a year-round motorail service would be beneficial. During summer 2001 services ran three times each week on a Friday, Saturday and Sunday. The Friday service ran attached to the sleeper, whilst on Saturday and Sundays daytime services operated.

8.6.3

During 2000 motorail also operated on weekdays, with one service daily Monday to Thursday (inclusive). However, weekday services were not offered for the summer 2001 timetable. This loss of weekday services is unfortunate for the tourist industry. A daily service would be beneficial, allowing greater flexibility for both outbound and return travel. In terms of allowing longer weekend breaks, a service operating on Mondays and Thursdays would be particularly beneficial.

8.6.4

During 2001, fares were frozen from 2000 levels in an attempt to increase the patronage of these services. At £49 single and £69 return for car and driver, motorail offers a price competitive alternative to the private car. Similarly, journey times compare well with the likely time taken to drive the complete distance. The service is appealing to holidaymakers as it offers a stress free alternative to driving, and enables the car to be used at the destination end. Motorail is particularly attractive to people with specially adapted vehicles (mobility impaired), who will require the use of their own vehicle at their destination.

8.6.5 One of the main drawbacks of the motorail service is that each train can carry only six cars. Limited advertising/ promotion of the service is made by First Great Western (it is included as part of their 'Guide to Services'), but given the limited number of spaces available and the limited number of services which operate, a large scale promotion could see demand outstripping supply.

8.6.6 A further restriction is that it is currently only possible to load and unload cars at Paddington and Penzance because special platform arrangements are required. If additional stations were to be altered to accommodate the loading and unloading of cars this would be beneficial in appealing to a wider passenger market. For example, Truro, as a more central destination, could be attractive as an alternative/additional terminus in the South West. Similarly, a loading/unloading point in the South East, outside of London could be beneficial. However, train pathing restrictions are likely to mean that the addition of intermediate loading/unloading stops would mean longer station dwell time (time the train is stationary at the platform) than the 2-3 minutes which is normally allowed. In addition, the development costs to allow the safe movement of the cars from the train/ platform could also be prohibitive and they may well interfere with the safe operation of the station.

8.6.7 Motorail could benefit tourism in the South West if services were offered on routes from further afield. This type of service is likely to appeal to passengers travelling, for example, from the Midlands or the North, where distance is a more critical issue in determining whether to holiday in the South West.

8.6.8 The following recommendations are made in respect of motorail:

- > *Maintain provision of a motorail service from London to Cornwall as part of the franchise agreement*
- > *Maintain, as a minimum summer timetable, the level of service provided during summer 2001*
- > *Provide additional services to cater for longer weekend/off peak breaks (e.g. services on a Monday and Thursday)*
- > *Provide additional capacity at peak times;*
- > *Assess the viability of providing a year round motorail service*
- > *Promote/Market motorail as a suitable mode of transport for tourist travel – encourage accommodation bookings to be 'packaged' with motorail*
- > *Promote motorail as an option for travel in one direction (with the other journey providing an opportunity to stop off and visit other places/attractions on route)*

- > *Assess the potential of creating provision for motorail to stop off/terminate at Truro and one further station in the South East (outside of London)*
- > *Encourage train operating companies to provide motorail on services originating outside of the SWARMMS study area (for example, the Midlands, North of England or Scotland)*
- > *Encourage a joint ticketing initiative between Euro Tunnel and motorail*

8.7 **Coach**

Scheduled coach services

8.7.1 Scheduled coaches, such as National Express services, are an important mode of transport for tourist based trips.

8.7.2 Coaches are important particularly to the price sensitive end of the tourism market. However, for others, increased journey times often outweigh the benefits of cheaper travel. As the popularity of short breaks increases in the South West and as people become increasingly 'money rich but time poor' this time differential (compared to both rail and use of the private car) is likely to become a more significant disincentive to coach travel.

8.7.3 A further important disincentive to the use of coaches for tourism travel is related to the perceived image of this mode of transport. Whilst National Express have developed marketing campaigns to reach out to the younger end of the market (for example, through joint initiatives with the Youth Hostelling Association) more could be done to promote coaches as a cost effective and credible mode of transport to the market as a whole.

8.7.4 Improvements to scheduled coach services are being considered in more detail in other elements of the SWARMMS strategy. Further details can be found in the following reports:

- Corridor Plan: London to Exeter;
- Corridor Plan: London to Bristol
- Corridor Plan: Bristol to Exeter; and
- Corridor Plan: Exeter to Penzance.

8.7.5 The following area plans also make recommendations in respect of coach services, however these are focused more on the commuter, rather than leisure, market:

- Area Plan: Swindon; and

- Area Plan: Bristol.

8.7.6 The recommendations likely to develop as a result of this stream of work will address routeing, length of journey, timetabling, frequency and quality of interchange. These will have obvious benefits for tourism travel.

8.7.7 The possibility of creating 'coachways' (interchange points located close to main trunk roads) is being considered in the series of corridor and area based plans. Whilst coachways may help to reduce journey times (by removing detours into town centres, with passengers instead transferring to integrated bus services) it is important to note, that for tourists, additional interchange of this nature, could itself be a disincentive to coach use.

Coach Tours

8.7.8 Organised coach tours (such as Shearings, Wallace Arnold and other commercial operators) are an important mode of transport for tourist trips. In the West Country in 1999 coach tours accounted for 4% of all tourism trips made in the region (compared to 4% nationally). These services operate effectively in many respects, offering a valuable service to those who do not have access to a car or who would prefer not to drive.

8.7.9 Holiday packages offering coach travel and accommodation are fairly common but should be encouraged. Recommendations regarding package holidays are made later in this report.

8.8 ***Rail/Bus***

8.8.1 Good integration between rail and bus is essential if tourists are to be encouraged to use public transport.

8.8.2 The main principles of bus/rail integration for regular users are similar for tourists. However, as non-regular users, tourists are less familiar with their surroundings; thus further emphasis is required on ticketing systems, fares and routes that are easy to understand. In general, tourists are less concerned about the time that the journey takes, and more concerned with the ease of interchange, level of comfort experienced and the assurance that all is as planned. As such, the following factors are important:

- Information about the interchange should be available before it is made;
- The journey should be made with one ticket;

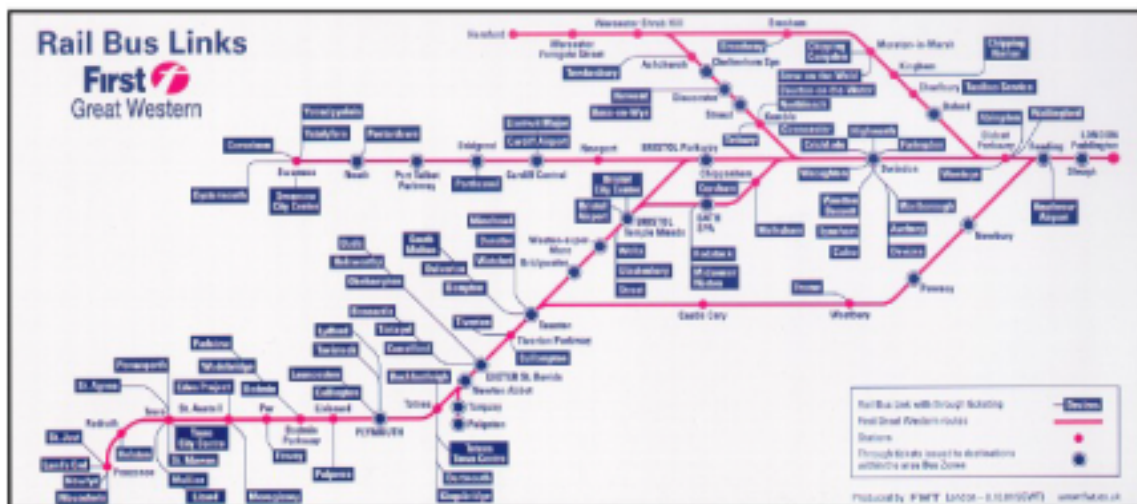
- The interchange should be straightforward;
- Bus and train timetables should be co-ordinated;
- Bus stops and train platforms should be close together; and
- Buses should be low floor and have adequate storage space for luggage.

8.8.3 Whilst the importance of these factors is clearly understood by transport providers in the South West, they are being achieved to varying degrees of success.

Information

8.8.4 First Great Western's booklet 'A Guide to Bus Links' (shown in Figure 8.3) provides information about bus links connecting to railway stations. This is an effective means of allowing passengers to access information about connecting bus services before they travel. It includes bus timetables, maps of bus stops/stations, fare information and contact details for operators. For tourists, this type of information is particularly important as it is often this last leg of the journey, between the train station and the final destination, that is the most difficult. If people are reassured that this journey can be made by public transport, and if they have this information before they travel, people may be encouraged to use public transport for the longer distance tourist trip. Uncertainty over this leg of the journey may otherwise be an incentive to travel by car.

Figure 8.3: First Great Western's 'A Guide to Bus Links'



8.8.5 Real time information (displays showing when the next bus/train is due) are recognised as an effective means of conveying public transport information. Indeed, DTLR has recently allocated additional funds for projects of this nature. For tourists, this type of information system is particularly valuable, offering reassurance in a situation where there might otherwise be considerable uncertainty.

8.8.6 In seeking to achieve better bus/rail integration the provision of real time bus information on trains, and vice versa could help to reassure passengers. Alternatively, staff can play a valuable role in providing information about connections.

Ticketing

8.8.7 Through ticketing is available for many train/bus journeys in the South West. However, often the public are not aware that such tickets are available. Indeed, in many cases ticket staff themselves are not aware that they are able to sell bus 'add ons' or through tickets and often fail to provide the public with the best information regarding the most appropriate/cheapest ticket for their journey. A further problem is that, in many cases, through tickets can only be purchased from staffed stations or rail-approved travel agents. As such, there is a need for greater flexibility, allowing tickets to be purchased on board the train/bus.

8.8.8 The Helston Branch Line (from the mainline station at Redruth to Helston) and the Eden Branch Line (from St Austell station to the Eden Project) are good models for rail/bus interchange meeting the needs of tourists. These services offer reassurance to tourists as they provide a linked service co-ordinating with, and waiting for incoming trains. They also provide 'added value' facilities such as additional space for luggage and cycle racks.

8.8.9 There is a need for more rail/bus links to tourist attractions. Such links offer the potential to be themed/branded, and provide a commentary and other 'extras' that add to the visitor experience. Information about these services should be included in promotional literature, and where appropriate incentives offered) such as discounts on admissions to people arriving by public transport

8.8.10 In respect of rail and bus, the following recommendations are made:

- > *Introduce ticketing systems on buses to allow a linked bus/train ticket to be purchased*
- > *Introduce ticketing systems on trains that allow a linked train/bus ticket to be purchased*

- > *Increase staff awareness of 'add on' tickets*
- > *Provide real time displays of train information on buses operating key routes*
- > *Provide real time bus information at rail stations*
- > *Provide cycle racks on buses operating key routes*
- > *Promote the branding of buses to reflect the livery/identity of train operating companies in order to promote the perception of a 'seamless' journey*
- > *Ensure that all buses are low floor and have adequate space for the storage of luggage*
- > *Ensure bus stops/stations are clearly signed from rail stations and vice versa*
- > *Encourage the development of branded/themed trains/buses to serve tourist attractions (such that they 'add to the visitor experience')*
- > *Develop branch line bus services, using the Helston and Eden branch line buses as a model*

8.9 **Rail/Bicycle**

Cycle Tourism

- 8.9.1 Cycling is a popular activity in the South West and cycle tourism is an important potential growth area. Cycle paths such as the Cornish Way, the Tarka Trail and other parts of the National Cycle Network attract leisure cyclists to the region. Whilst many of these visitors would like to be able to travel both into and around the region by public transport because this offers more flexibility in choosing cycle routes (linear rather than circular routes), this is often perceived as unfeasible. Indeed, in recent years, unsuitable rolling stock, low service frequency and frequent engineering works at weekends have discouraged leisure cyclists in particular from travelling by train. Instead, cycles are loaded onto the back of cars.
- 8.9.2 Enhanced capacity to carry cycles by train could therefore help to encourage a mode shift from car to public transport for both longer and shorter distance journeys. Importantly, it could also encourage others currently discouraged by the difficulty of carrying cycles by train to visit the South West.
- 8.9.3 The need to encourage and better provide for journeys combining rail and cycles is reflected in current policy guidance. The Government's Integrated Transport White Paper includes the following specific objectives for cycling and rail:
- To improve customer satisfaction;
 - To increase the number of customers arriving at stations by cycle;
 - To increase the number of cycles carried on trains; and
 - To provide a competitive alternative to the private car.

Cyclists Touring Club

8.9.4 The Cyclists Touring Club (CTC) argue that the Strategic Rail Authority needs to ensure that provision for cyclists are made in franchising agreements. These should include:

- Safe and convenient cycle access at all stations;
- Cycle storage facilities (for both long and short term use) at rail interchanges;
- Retain capacity for cycle carriage on trains when rolling stock is replaced or refurbished, and expand capacity where possible;
- All trains to be capable of carrying six cycles and at least one tandem bicycle to enable families to access the National Cycle Network;
- Facilities for cycling passengers to be fully promoted and publicised at stations and via enquiry and sales points;
- Facilities for cycling passengers to be comprehensively sign-posted and easy to access and use; and
- Journeys that involve the services of other train operators to be managed and delivered in order to enable seamless 'door to door' travel by cycle and rail.

8.9.5 Of particular relevance to the SWARMMS study are the CTC's recommendations regarding cycle carriage on trains. They suggest that dedicated space should be provided on all trains or that, as a second best alternative, areas of tip up seating should be used to provide additional cycle capacity.

Rolling Stock

8.9.6 The layout of existing rolling stock used in the South West leaves little room for large luggage items or bicycles in the passenger carriages themselves. First Great Western's HST fleet are able to utilise the guard's van (situated adjacent to the power car) for the storage of bicycles. This has recently been upgraded so that six bicycles are able to be carried in designated racks. Whilst this capacity represents an improvement it is not sufficient. In particular, capacity is often not sufficient to cater for families or groups of friends wishing to travel together.

8.9.7 However, many diesel units operating on local services within the South West area do not have this option because of the interior layout limiting available area for cycle storage. Increasing the space available for carrying cycles reduces available space for fare-paying passengers and potential revenue to the operators. In this

case, the option of having tip up seats that can be used by passengers at times when cycles are not carried may be more acceptable.

Booking

8.9.8 Most operators charge a small fee to carry cycles. Booking is often necessary due to limited capacity. Flexibility in booking arrangements varies between operators, some requiring notification the day before travel. Tourists may be encouraged to travel by train and cycle if booking arrangements could be made more easily and were more flexible. Ideally, capacity needs to be such that a 'turn up and go' type service can be offered. However, until capacity is increased, this is unlikely to be practicable.

8.9.9 Currently, most operators require bookings for the carriage of cycles to be made by phone. Booking could perhaps be made easier if it could be arranged over the Internet, or from public transport information points.

8.9.10 If cycle/rail is to be promoted it is important that associated infrastructure is in place. The provision of adequate cycle routes to stations is important, and these should be clearly signposted. Equally, secure cycle parking facilities should be provided.

Marketing

8.9.11 There is a significant opportunity to market the combination of travel by cycle and by rail, particularly where rail stations provide good access to established cycle routes. If the capacity to carry cycles was in place 'cycling days out by train' leaflets could be published and cycle routes could be 'sold' on the basis of easy access by rail. Stations close to the National Cycle Network such as Bodmin Parkway or Barnstaple could be targeted in this way.

8.9.12 Cycle hire is a significant issue and this is dealt within the next Chapter. However, whilst cycle hire outlets can provide an alternative to the carriage of cycles by car/public transport, they should not be seen as the 'easy solution' to the problems currently experienced with the carriage of cycles by train.

8.9.13 In respect of rail and cycle, the following recommendations are made:

> *Provide secure cycle lockers at stations*

- > *Encourage train operating companies to expand capacity to carry cycles, through the provision of dedicated spaces, and additional capacity through use of tip-up seating*
- > *Encourage train operating companies to carry cycles for free*
- > *Encourage more flexible booking for cycles (up until a short time before departure)*
- > *Encourage train operating companies to facilitate booking cycles over the Internet*
- > *Provide a 'check in' for cycles between key destinations*
- > *Promote days out from stations by bike*
- > *Ensure that all stations are accessible by cycle*

8.10

Rail/ Car Hire

8.10.1

In providing alternatives for the longer distance trip into the South West the combination of rail travel and car hire has the potential to offer benefits to tourists. This combination allows for a relaxing, car-free trip into the region, potentially achieving some mode shift away from the private car, whilst providing a vehicle at the destination end for touring. The combination of rail/hire car may be particularly attractive for overseas visitors who may not wish to drive to Devon and Cornwall, for example, but wish to have a vehicle available when they arrive.

8.10.2

This is not a new initiative, indeed the collection of hire cars at rail stations has been available for many years. Increasingly, train operating companies offer the opportunity to combine modes in this way at a discounted rate. For example, First Great Western has joined forces with Avis, to offer preferential business and leisure rates for customers. This initiative operates under the banner 'RailDrive' and offers passengers a hire car from a designated station (currently only Bristol Parkway, Bristol Temple Meads, Exeter St. Davids, Plymouth, Swansea, Taunton and Tiverton Parkway) as shown in Figure 8.3. This can be booked through Avis Central Reservations by quoting a special reservation number. This scheme could be expanded to serve other stations.

Figure 8.3- First Great Western/Avis 'RailDrive'

8.10.3 The combination of rail/car hire offers the opportunity to package holidays in a similar fashion to 'fly-drive' packages abroad. The provision of car hire at rail stations should include parkway stations as these are often located closer to the strategic road network allowing for easy access by car. They are also often more remote from urban areas meaning that public transport services are less frequent, thus making car hire relatively more attractive.

8.10.4 In respect of rail and car hire, the following recommendations are made:

- > *Provide a car hire collection/drop off facility at all main stations, including Parkway Stations*
- > *Encourage joint booking of train travel/hire car*
- > *Provide train/hire car holiday 'packages'*

8.11

Rail/Taxi

8.11.1

The combination of rail and taxi offers a further opportunity to integrate modes in order to provide a 'door to door' service. Pre-bookable taxis that wait for trains are beneficial to tourists as they provide a reliable mode for the 'last leg' of the journey. Services of this nature are particularly valuable at smaller stations that do not have a taxi office.

8.11.2

First Great Western is currently trialling a train-taxi, based on a Dutch model, in Truro. If successful, this scheme will be rolled out at other stations. These train-taxis carry a First Great Western livery and offer a flat fare for travel within the urban area. Taxis can be booked at the station, on the train, or before travelling. For tourists, this type of service is ideal, providing door to door transport to areas that may otherwise lie off regular public transport routes and removing the uncertainty associated with other modes.

8.11.3

In respect of rail and taxi, the following recommendations are made:

- > *Provide a taxi pre booking service for all ticket holders*
- > *Encourage the pre-booking of fixed price taxi journeys*
- > *Provide branded taxis (in the livery of the train operating company) to promote a 'seamless' journey*

8.12

Links to Airports

8.12.1

Figure 8.4 illustrates the location of airports within the South West. For those areas that receive many overseas visitors, links to regional and national airports are important. Indeed, access times from Bristol and Heathrow are an important marketing tool.

8.12.2

Public transport links between Bath and Bristol International Airport are perceived as problematic by the tourism industry, as an interchange between train and bus is required at Bristol Temple Meads station. Access times from Heathrow are also seen as poor, with express coaches bypassing Bath. Areas such as East Devon, Torbay and Exeter would also benefit from improved public transport access to Exeter Airport.

Figure 8.4: Location of Airports in the SWARMMS Study Area



8.12.3 The recently launched Ryanair service between Newquay and London Stansted (basic price £39 per single journey) has been warmly received by the tourism industry. The growth in services such as this highlights the need to ensure that regional airports such as Newquay are well served by public transport. Indeed, whilst concerns regarding the environmental impact of short haul flights are acknowledged, the regional airports in particular offer potential to attract additional, often 'higher spend', visitors to the region.

8.12.4 Conversely, it is important also to acknowledge that providing improved public transport links to regional (and other) airports will have benefits for residents of the South West region in accessing airports for their own holiday or business related travel.

8.12.5 In respect of links to airports, the following recommendations are made:

- > *Provide more direct bus/coach and rail links between regional/London airports and tourist areas, in particular Devon, Cornwall and Bath/Exeter and Torbay*
- > *Investigate the potential of developing coachways, as drop off points for key destinations*

9 Recommendations for Travel Within the South West

9.1 *Introduction*

9.1.1 This Chapter is concerned with travel within the South West. It focuses particularly on journeys made by:

- Staying visitors travelling around the area whilst on holiday; and
- Day visits made by people living more locally.

9.1.2 It is important to recognise that these issues are closely linked with those relating to longer distance travel, discussed in the previous Chapter. Indeed, by providing for people to travel around the South West region by means other than the private car whilst they are on holiday, they may be encouraged to consider the possibility that they can holiday without their car altogether. Visitors may therefore be encouraged to consider making their longer distance journey by more sustainable means also.

9.2 *Rail*

9.2.1 Rail can provide an efficient means of touring the South West and visiting tourist destinations/attractions.

Publicity/Information

9.2.2 The 'Days Out by Train' leaflets described in Chapter 7 are a good example of a way in which tourists and also people making days trips from home, can be encouraged to travel around the South West region without a car. Thus far, these leaflets have been distributed only locally. Ideally, this type of information should be made available to people before they leave home. If people are assured that they will be able to travel around the region without their car they may think harder about making their longer distance journey by public transport also. However, expanding the area covered is dependent on creating additional staff resources to do the work.

Ticketing

9.2.3 Discounted rail fares can also encourage both tourists and day visitors travelling from home to use the railways. During Summer 2001, First Great Western offered

a £5 day return for destinations between Taunton and Penzance, for journeys weekdays (excluding Fridays) after 9:40am. Offers of this nature are likely to encourage people to make day trips when they otherwise may not have done, or may not have been able to and also encourage people to think about the alternatives to private motoring. For families in particular, this is an attractive discount. By restricting times to off peak periods, tourists benefit from cheaper fares and train operating companies benefit by increasing patronage.

9.2.4 The introduction of a regional rail card, offering unlimited travel around the South West for a period of time on a single ticket would be beneficial to tourists. A ticket of this nature would appeal to people without a car, people wishing to travel without their car, and overseas visitors without access to a car. The ScotRail 'Freedom of Scotland FlexiPass' discussed in Chapter 7 suggests that this type of ticketing arrangement can work in the UK. This type of regional ticket would be beneficial in the South West, allowing greater flexibility and better value for money for travel around the region.

9.2.5 In respect of rail the following recommendations are made:

- > *Continue to/encourage further production of 'days out by train' leaflets by train*
- > *Distribute 'days out' leaflets over a wider area and encourage hoteliers/travel agents to send these out to people booking holidays in advance*
- > *Encourage discount fares for tourists during off-peak periods*
- > *Develop a regional rail pass, allowing travel throughout the South West, on a single ticket*

9.3 **Bus**

9.3.1 Many of the issues related to travel by bus around the region are the same as those stated in Chapter 8 relating to the integration of bus and rail. These sections deal with issues and recommendations that are related more closely to shorter distance travel within the region.

Services

9.3.2 Of particular importance to bus travel around the region, is that buses are comfortable, clean, are easily accessible, have space for the storage of luggage, and where appropriate are able to carry cycles. Bus conductors, who are able to provide assistance in boarding, provide information about ticket types, and act as a tour guide are beneficial on tourist routes. Similarly, the quality of the waiting environments is as important, if not more so, to tourists than to other passengers.

Information

- 9.3.3 For tourists to use buses to travel around the region, it is important that public transport information is readily available. Ideally, information regarding the opportunities presented by buses should be available to people before they travel. Websites such as www.traveline.org.uk and the Traveline telephone number help help in this respect allowing people to browse timetables and plan journeys in advance.
- 9.3.4 Public transport information is published regularly by Local Authorities in booklet/leaflet form. The quality of this information, and the extent to which it is updated varies between authorities and is often dependent on the available budget.
- 9.3.5 Timetables are available from tourist information centres and other locations. However, often a charge is made for this information. If people are to be encouraged to use public transport it is important that information is more readily available, updated more frequently, and, as far as possible, be made available free of charge.
- 9.3.6 Public transport information should be provided in hotels, guest houses, at camp sites and so on, so that visitors are encouraged to plan car free days out. 'Bedroom browsers' containing information about local attractions, should also include information about local bus services.
- 9.3.7 Studies, such as the Nottingham City Council study detailed in Chapter 7, suggest that many people, even in their local area, do not understand public transport. This level of uncertainty is almost certain to increase in situations where people are unfamiliar with their surroundings. Thus, it is likely that many tourists and visitors are unlikely to fully understand the transport system in their holiday destination.
- 9.3.8 Personalised bus maps therefore offer a potential way of providing visitors with bus information. If funding were made available, these maps could be produced and distributed by local authorities or tourist boards for particular hotels and other accommodation sites within their area, showing clearly where the nearest bus stops are, listing the attractions that they serve, and giving timetable information. In this way tourists are provided with all the information that they need to plan a journey in a simple format. Hoteliers should be encouraged to send out these maps to people booking in advance so that they are aware of the opportunities available to them. Further information is provided on this topic in Chapter 7.

9.3.9 Attraction leaflets are increasingly providing better public transport information. This should be encouraged. Where appropriate, timetable and fare information should be also be included.

Ticketing

9.3.10 Flexible, easy to understand systems of ticketing are crucial if bus use is to be encouraged for tourist trips. A variety of day rider/explorer tickets are available; however these are not always well promoted and can be difficult to use (with often complex restrictions in place).

9.3.11 As discussed in Appendix B, Devon County Council hope to launch, in April 2002, the Devon Rover ticket. This will be available on all buses in the County, thus making ticketing arrangements more straightforward. This type of system has great benefits to tourists and visitors, allowing them the freedom to travel around, and removing the hassle and uncertainty often experienced regarding different ticket types and different operators. Ideally, this type of system should be expanded to have wider geographical coverage.

9.3.12 Linked tickets offering travel and entrance to attractions are increasingly popular. These should be encouraged and more actively promoted.

9.3.13 In respect of bus services, the following recommendations are made:

- > *Provide free bus timetables at tourist information centres, travel agents, hotels and other key locations*
- > *Produce 'personalised' bus maps that can be sent out by accommodation providers and others to customers booking in advance*
- > *Provide hoteliers with 'bedroom browsers' with information on public transport, including 'personalised' bus maps, timetable information, example routes to key attractions by public transport and so on*
- > *Provide cycle racks on buses operating on key routes (particularly those serving primary tourism destinations)*
- > *Ensure that all buses have adequate space for the storage of luggage*
- > *Further develop flexible ticketing systems, allowing unlimited travel by bus in defined areas*
- > *Develop a bus pass that can be used throughout the South West*
- > *Further develop linked tickets allowing travel and entrance to key tourist attractions.*

9.4

Demand Responsive Bus

9.4.1

Demand responsive buses, such as the Wiltshire Wigglybus and Gloucestershire's Village Link, provide a flexible form of bus based transport. These buses are able to deviate from a 'core' route to serve areas that would otherwise not sustain a conventional bus service. Journeys are booked in advance through a central call-centre and information passed to the driver using mobile telephone technology.

9.4.2

Whilst these existing services aim to meet the transport needs of local residents the concept of a demand responsive service could equally be applied to tourist based travel. Indeed, the concept would seem to have particular merit in the South West where self catering accommodation (camp sites, caravan parks and chalets) are often located in rural areas where direct public transport links are often, at best, infrequent. Given the dominance of the private car as a mode of tourist travel in the South West, such sites, even if popular during the summer months, would be unlikely to sustain the passenger numbers necessary for a conventional bus service.

9.4.3

Core routes could be structured so that several accommodation sites and attractions are served. Information about booking journeys could be provided via leaflets and other publicity. Reception areas could perhaps also act as the intermediary, by booking journeys for guests.

9.4.4

In respect of demand responsive bus, the following recommendations are made:

- > *Develop demand responsive bus services to serve rural tourist areas (for example, to link camping and caravan sites to resort centres and attractions)*
- > *Include details of the demand responsive service in brochures and promotional material*
- > *Provide information about demand responsive buses to guests when they book*
- > *Encourage accommodation providers to provide a booking service for guests*

9.5

Cycling

Cycle Hire

9.5.1

A number of cycle hire businesses already operate in the South West. Publicity, and hence popularity, of existing cycle hire businesses is increasing, with details often published on leaflets and in promotional material. However, many of these businesses operate independently and therefore offer only a localised service.

9.5.2

Given the difficulties and inconvenience of carrying cycles by train, cycle hire offers an alternative. Cycle hire also provides the opportunity of enjoying the countryside and the tourist attractions without the need for a car.

9.5.3 A possible initiative would be to provide a network of linked cycle outlets at key locations, for example at rail stations that are close to key cycle routes, in particular National Cycle Network routes. This would mean that passengers would not need to carry their bicycles on the train, but would be able to collect a cycle at their ultimate destination. The bicycles could then be used and returned at the end of their trip to the hire shop. Should this be a chain of outlets, then there would be the possibility of collecting the bicycle at one location and returning it to a different shop at another location.

9.5.4 Outlets could be operated as a partnership between local cycle hire businesses (utilising and building upon existing facilities where appropriate) and other organisations (as in the case study detailed in Chapter 7). In particular, partnership between cycle hire businesses and train operating companies would be beneficial and would offer the opportunity for widespread promotion (as in the Avis car hire/First Great Western Partnership). Co-operation with Railtrack would also be necessary in order to ensure that cycle hire facilities could be provided within existing rail station buildings/car parks (to ensure good physical integration of facilities).

9.5.5 As with other initiatives, information about the potential to hire cycles should be available at the start of the journey. The Internet could be used as a means of selecting and booking cycles. Cycle hire 'add on' tickets could allow for a single payment to cover both the cycle and rail elements of a journey.

Promotion

9.5.6 Devon and Cornwall, in particular, already use the opportunities to cycle in the area as a 'selling point'. For example, the publication 'Cycle Routes in Devon: Making Tracks, 2001' provides information and maps of the key cycling routes. These leaflets are available free of charge and are sent out on request. It is important that funds continue to be available to do this. Again, leaflets should be included in bedroom browsers, and where possible sent to visitors in advance.

Cycle Routes

9.5.7 There are a variety of cycle routes already established in the South West. These include National Cycle Network Routes, regional cycle routes and other local routes. The continued development, and maintenance of these routes are important to the tourist industry. In particular, the completion of the National Cycle Network in the South West is likely to have benefits to the tourism industry.

Publicity and signage of these routes are key requirements. As mentioned above, the provision of interchange points on/close to such routes (such as at railway stations) allowing people to access them with their cycles, by means other than the private car should be developed and promoted.

9.5.8 Networks of Quiet Roads and Greenways should be developed by Local Authorities as these provide safe and attractive routes for leisure cyclists.

9.5.9 In respect of cycling, the following recommendations are made:

- > *Encourage the development of a network of cycle hire outlets*
- > *Encourage partnerships between cycle hire outlets and train operating companies*
- > *Provide joint ticketing of rail ticket/cycle hire*
- > *Provide Internet booking of cycles*
- > *Create, signpost and advertise cycle routes*
- > *Develop further networks of Quiet Roads and Greenways and support the completion of other routes such as the National Cycle Network*

10 Recommendations for the Tourism Industry

10.1 *Introduction*

10.1.1 This Chapter deals with recommendations that do not relate directly to a particular mode of transport but that are best dealt with by the tourist industry itself.

10.1.2 The tourist industry can help to address transport issues in a number of ways. Most importantly, the industry can help to provide and disseminate information about transport choices. Indeed, as the interface with the consumer, the tourism industry itself is in a powerful and influential position.

10.2 *Travel Plans*

10.2.1 PPG13 calls for Travel Plans to be submitted alongside planning applications which are likely to have significant transport implications. Increasingly also, businesses, schools, hospitals and other organisations are being encouraged to develop Travel Plans as a means of raising awareness about travel patterns, and encouraging mode shift.

10.2.2 Benefits can be achieved from developing Travel Plans for tourist attractions. By setting objectives and targets and defining initiatives, Travel Plans can play an important role in raising awareness of tourist travel patterns and provide a means through which to focus on ensuring that adequate public transport links are provided. Travel Plans should provide robust targets for arrivals by public transport and initiatives should be in place to ensure that these are achieved.

10.2.3 The Energy Efficiency Best Practice Programme (EEBPP) provides five days of free advice to help schools, tourist attractions, leisure sites and other sites with the development of a travel plan. Expert travel advisors can help with:

- Making a business case for a travel plan;
- Advising on the design, implementation of a travel survey;
- Facilitating workshops to develop a strategy for the development of a travel plan;
- Advising on the development and implementation of the most cost effective initiatives;
- Advising on the monitoring and evaluation of a travel plan; and

- Assisting with negotiations with public transport operators.

10.2.4 The example cited in Chapter 7 of Harewood House near Leeds shows that Travel Plans can be applied to tourist attractions and can have a beneficial impact. Attractions should therefore be encouraged to develop Travel Plans. Whilst this may seem an onerous task, particularly for small businesses, Travel Plans could be produced for groups of local attractions, thereby reducing the potential cost.

10.2.5 In respect of travel plans the following recommendations are made:

- > *Encourage attractions to develop Travel Plans*
- > *Provide guidance and expertise to facilitate the development of Travel Plans and promote the uptake of the service provided by EEBPP*

10.3 **Visitor Management Techniques**

10.3.1 Visitor management can help to ensure that traffic problems associated with an influx of visitors to a specific attraction or area are minimised.

10.3.2 The Eden Project has experienced difficulties recently in this respect, with large influxes of visitors arriving first thing in the morning and on rainy days. As a result, during Summer 2001, it produced leaflets and advertised in the press actively encouraging people not to visit during the morning period. Such techniques are important in managing traffic volumes.

10.3.3 Attractions can help to encourage visitors to use modes other than the private car by including public transport information on their brochures/leaflets and other publicity material. Discounts can also be offered for people arriving by public transport.

10.3.4 In respect of visitor management, the following recommendations are made:

- > *Encourage attractions to develop enhanced visitor management techniques to encourage visitors to arrive at different times*
- > *Encourage attractions to include public transport information in their publicity material and offer discounts for guests arriving by public transport*

10.4 **Accommodation Providers**

10.4.1 Accommodation providers, as the interface between the industry and the customer, can be important in terms of influencing the activities undertaken and

the behaviour of their guests. Accommodation providers can help to encourage a greater use of public transport in a number of ways. Many of these, for example by sending out/providing public transport information, have been discussed in previous Chapters.

- 10.4.2 Other important factors include the impact of change-over-days on traffic flows. The industry can assist the transport situation in this respect by offering more diverse change-over-days and offering incentives for mid-week accommodation. Whilst this already happens to a certain extent, more could be done.
- 10.4.3 As discussed in Chapter 8, uncertainty over the 'last leg' of the journey can often be an influential factor in choosing to travel to the South West by car. In addition to the measures outlined previously, the industry can assist in this respect by providing a meet and greet service for guests arriving by public transport. There are obvious costs associated with this, but organised, perhaps in partnership with other accommodation providers, the service could become a selling point for hoteliers and others.
- 10.4.4 Similarly, accommodation providers and others can assist by making it easier for tourists to use public transport, walk or cycle. For example, by providing more flexible check out times, or storage of luggage if travelling by train/coach can be made more convenient. Also, by providing this type of service people may be encouraged to spend the whole of their last day in the region, and thus contribute further to the local economy, rather than be forced to travel straight home because of nowhere to leave baggage. Cycling and walking can be encouraged if hotels provide laundry facilities, drying rooms, baggage transfer and other facilities.
- 10.4.5 In respect of the tourism industry itself, the following recommendations are made:
- > *Encourage hoteliers to operate more diverse change-over-days and check out times*
 - > *Encourage hoteliers to provide a 'meet and greet' service for guests arriving by public transport*
 - > *Encourage accommodation providers to offer additional services such as laundry and baggage transfer/storage*

11 Other Recommendations

11.1

Introduction

11.1.1

This Chapter deals with further recommendations. It considers the role of the land use planning system and wider issue concerning promotion and the provision of information.

11.2

Package Holidays

11.2.1

For many people, organising public transport is seen as a hassle and inconvenience. The opportunity therefore exists to offer transport by coach/train as an 'add on' and as part of a holiday package. Similarly, hire car could be booked in this way. Conversely, offering accommodation as an 'add on' to travel, can be attractive. Additional services such as luggage transfer could help to make this type of package holiday more attractive.

11.2.2

Package holidays to the South West are currently offered by several companies. However, the concept of 'packaging' travel, accommodation and activities could be further developed. For example, through partnership with hoteliers, train operating companies could themselves offer incentives for joint booking. GNER offer this service via their website. This type of service should be encouraged.

11.2.3

In respect of package holidays, the following recommendations are made:

- > *Further develop and market 'package holidays' to the South West, to include the simultaneous booking of accommodation and transport (coach, rail, hire car).*
- > *Develop a courier service to transport luggage from home to accommodation and provide this service as an option as part of the holiday 'package'.*

11.3

Public Transport Information

11.3.1

Tourist information centres and travel agents currently have to pay for CD ROM databases of rail timetable information. This information should be provided free of charge as an incentive for more outlets to obtain the data and as an incentive for all outlets to access up to date information.

11.3.2

WAP technology offers significant potential for the development of more flexible ways to access public transport information. Currently, limited timetable information and announcements are available. If this service were expanded and

publicised it would provide a valuable source of information for use in journey planning for both the longer and shorter distance trips.

11.3.3 Public transport information call-centres such as Traveline provide a valuable service. The provision of a single number, offering access to timetable information for any area, offers great potential benefit to tourists, removing the uncertainty about how to access information in unfamiliar locations. The system also means that people can easily access travel information about their destination area before they travel, hence offering the opportunity to plan journeys in advance. Increased publicity is required such that the Traveline telephone number becomes more widely known.

11.3.4 As an Internet based system this services offers the potential to be further developed such that it can be accessed from terminal points sited in key locations (such as at hotels and camp sites).

11.3.5 Whilst Traveline is clearly a step in the right direction, the service is not always capable of offering the kind of local information the tourists often value. Indeed, the service is purely timetable based and details are given by regional staff who are often not familiar with the area for which information is required. For tourists, this type of service, whilst clearly informative, does not provide the scope to add the 'local flavour' that tourists value. This suggests that additional alternative sources of public transport information are also necessary.

11.3.6 A number of additional problems with the system in place so far are clear:

- > *The information used by Traveline is supplied by Local Authorities. Whilst, operators are obliged to provide information on timetables, they are not required to provide detail relating to fares, therefore Traveline cannot provide information regarding the cost of many journeys.*
- > *As yet, Traveline is also unable to post, e-mail or fax information.*

11.3.7 In respect of public transport information, the following recommendations are made:

- > *Investigate the potential of providing more advanced public transport information using mobile phone technology.*

- > *Provide tourist information centres, travel agents and other outlets with free CD ROM databases providing rail timetable information enabling them to access and print out timetable information (without the need for an Internet connection).*
- > *Promote the Traveline information line as a means of providing tourists with a source of public transport information (advertises in tourist brochures, at hotels, in tourist information centres, at bus/rail/coach stations, at service stations and on television).*
- > *Further develop Traveline so that fare information can be made available and so that it is possible to provide information by post, e-mail or fax, as requested.*
- > *Provide Internet based information points providing details of public transport services at key locations.*

11.4

11.4.1

Working Together

There is a need for greater co-ordination between Local Authority departments responsible for transport departments and those responsible for tourism and marketing. There are obvious advantages in departments working more closely on tourism and transport based issues. In many cases a transport departments knowledge of local issues can help tourism units understand where and when marketing and publicity is required. As example, planned improvements to rail services to a particular location can offer opportunities to target marketing towards different areas. Closer working relationships between departments can help to ensure that knowledge is passed on and that opportunities are used to the best advantage.

11.4.2

In respect of this issue, the following recommendation is made:

- > *Promote a closer working relationship between transport and tourism departments/organisations.*

12 Priorities for Action

12.1 ***Introduction***

12.1.1 This Chapter prioritises the recommendations made earlier in the report. Short and medium term priorities are identified, based on a number of criteria.

12.2 ***Rationale***

12.2.1 The recommendations outlined in the previous chapters differ considerably in terms of cost, ease of implementation, the likely impact that they may have on the main transport corridors and the benefits that they might bring to the tourism industry. In this section, short and medium term priorities are identified.

Priority in terms of achieving Plan objectives

12.2.2 A priority (short or medium term) is allocated to each recommendation based on its potential to meet the objectives of the Plan as stated in Chapter 1. That is, to:

- Encourage tourists to use public transport (rather than the private car) for journeys to the South West, or for trips around the South West; and
- Attract additional tourism trips by public transport.

12.2.3 Those recommendations identified as short term priorities will therefore have potential to create a modal shift and encourage additional trips by public transport. Those recommendations identified as medium term priorities are likely to have a more marginal impact on transport and tourism (or are types of initiative where the likely benefits are less well understood).

12.2.4 Some of the recommendations made are for further assessment to be undertaken to determine the likely impact of an initiative. This type of recommendation is classed as a short term priority. That is, the further assessment (as an activity in its own right) should be undertaken in the near future.

Deliverability

12.2.5 In addition, a priority is allocated to each recommendation based on its potential deliverability. Short term priorities are allocated to recommendations that are likely to be deliverable within the next five years. These include initiatives which are likely to be:

- Lower cost (either a low initial capital cost or a relatively low annual revenue cost); and/or
- Relatively easy to implement (few institutional, infrastructural or organisational barriers).

12.2.6

Conversely, medium term priorities are allocated to recommendations that are more likely to be delivered within the next five to ten years. They are:

- Likely to be higher cost (either requiring a high capital cost or a high annual revenue cost); and/or
- More difficult to implement (for example, those that require co-operation from a number of organisations, or those that may be at odds with the commercial nature of certain organisations).

12.3

Priorities and Responsibilities

12.3.1

Table 12.1 lists the recommendations and allocates a priority to each. Short terms priorities are denoted by the abbreviation ST and medium term by MT. Table 12.1 also indicates which organisations should be responsible for implementing these recommendations.

12.3.2

To summarise the contents of Table 12.1 the short term priorities generally address issues related to the provision of better travel information and the cost and amenity of public transport (in terms of more flexible ticketing systems that offer value for money). Measures of this nature are likely to play a significant part in achieving the objectives of this tourism Plan. They should be set in motion at the earliest opportunity.

12.3.3

The medium term priorities identified in Table 12.1 will generally either take longer to implement or would be more effective with the short term priorities already in place. They remain however, important parts of a package of measures to address tourist travel.

Table 12.1 – Priorities for Action

Ref	Recommendations for Longer-Distance trips into the South West	Deliverability	Priority	Responsibility
A Road				
A1	Promote the A361/A39 as an alternative route for tourist traffic	ST	MT	Local Authorities
A2	Investigate the potential for creating/advertising further routes of this nature	ST	MT	Local Authorities
B General Rail				
B1	Encourage train operating companies to provide further discounted tickets for tourist travel in off-peak periods	MT	ST	TOC
B2	Develop initiatives to 'add' to the visitor experience, including themed trains for surfers and cyclists	MT	ST	TOC
B3	Ensure greater consistency between winter and summer timetables to key tourist destinations	MT	MT	TOC
B4	Investigate a means of overcoming the disincentive of peak time fares for shorter length tourist based trips	MT	ST	TOC/Tourist Board
B5	Introduce a 'check in' facility for luggage between key rail stations	MT	ST	TOC
B6	Subject to direction by the Transport Police, encourage the re-introduction of secure left-luggage facilities at rail stations	MT	ST	Railtrack/TOC
B7	Make the Brit Pass, or similar ticket type, available to UK residents	ST	ST	TOC/Tourist Board
B8	Incorporate tourist information centres at rail stations and transport interchanges	MT	ST	Railtrack/Tourist Board
C Sleeper				
C1	Allow for the occupation of sleeper berths at a greater range of stations on the London to Cornwall corridor and on services from the North and Midlands	MT	MT	Railtrack/TOC
C2	Promote the sleeper as a tourist service through targeted marketing initiatives	MT	MT	TOC/Tourist Board
C3	Promote the sleeper as an option for one way travel through the provision of a linked ticket allowing travel in one direction on the sleeper and the other direction as a regular ticket	ST	MT	TOC/Tourist Board
C4	Provide joint ticketing between the sleeper service and Eurostar and promote this as a 'seamless journey' in order to encourage overseas visitors to visit the South West.	ST	MT	TOC
D Motorail				
D1	Maintain provision of a motorail service from London to Cornwall as part of the franchise agreement	ST	MT	SRA/TOC
D2	Maintain, as a minimum summer timetable, the level of service provided during summer 2001	ST	MT	TOC
D3	Provide additional services to cater for longer weekend/off peak breaks (e.g. services on a Monday and Thursday)	MT	MT	TOC
D4	Provide additional capacity at peak times;	MT	MT	TOC

Ref	Recommendations for Longer-Distance trips into the South West	Deliverability	Priority	Responsibility
D5	Assess the viability of providing a year round motorail service	ST	MT	TOC
D6	Promote/Market motorail as a suitable mode of transport for tourist travel – encourage accommodation bookings to be ‘packaged’ with motorail	ST	MT	TOC/Tourist Board
D7	Promote motorail as an option for travel in one direction (with the other journey providing an opportunity to stop off and visit other places/attractions on route)	ST	MT	TOC/Tourist Board
D8	Assess the potential of creating provision for motorail to stop off/terminate at Truro and one further station in the South East (outside of London)	ST	MT	TOC/Tourist Board
D9	Encourage train operating companies to provide motorail on services originating outside of the SWARMMS study area (for example, the Midlands, North of England or Scotland)	MT	MT	SRA/TOC
D10	Encourage a joint ticketing initiative between Euro Tunnel and motorail	ST	MT	TOC
E Rail/Bus				
E1	Introduce ticketing systems on buses to allow a linked bus/train ticket to be purchased	ST	ST	TOC/Bus operators
E2	Introduce ticketing systems on trains that allow a linked train/bus ticket to be purchased	ST	ST	TOC/Bus operators
E3	Increase staff awareness of ‘add on’ tickets	ST	ST	TOC/Bus operators
E4	Provide real time displays of train information on buses operating key routes	MT	MT	TOC/Bus operators
E5	Provide real time bus information at rail stations	MT	MT	TOC/Bus operators
E6	Provide cycle racks on buses operating key routes	MT	ST	TOC/Bus operators
E7	Promote the branding of buses to reflect the livery/identity of train operating companies in order to promote the perception of a ‘seamless’ journey	MT	MT	TOC/Bus operators
E8	Ensure that all buses are low floor and have adequate space for the storage of luggage	MT	ST	Bus operators
E9	Ensure bus stops/stations are clearly signed from rail stations and vice versa	ST	ST	TOC/Bus operators
E10	Encourage the development of branded/themed trains/buses to serve tourist attractions (such that they ‘add to the visitor experience)	ST	ST	
E11	Develop branch line bus services, using the Helston and Eden branch line buses as a model	ST	ST	TOC/Bus operators
F Rail/cycle				
F1	Provide secure cycle lockers at stations	MT	ST	Railtrack/TOC
F2	Encourage train operating companies to expand capacity to carry cycles, through the provision of dedicated spaces, and additional capacity through use of tip-up seating	MT	ST	SRA/TOC
F3	Encourage train operating companies to carry cycles for free	MT	MT	SRA/TOC

Ref	Recommendations for Longer-Distance trips into the South West	Deliverability	Priority	Responsibility
F4	Encourage more flexible booking for cycles (up until a short time before departure)	MT	ST	TOC
F5	Encourage train operating companies to facilitate booking cycles over the Internet	MT	MT	TOC
F6	Provide a 'check in' for cycles between key destinations	MT	ST	TOC
F7	Promote days out from stations by bike	ST	ST	TOC/Tourist Board/Cycle Hire Outlets
F8	Ensure that all stations are accessible by cycle	ST	ST	Railtrack/TOC/Local Authorities
G Rail/Car Hire				
G1	Provide a car hire collection/drop off facility at all main stations, including Parkway stations	ST	MT	TOC/Car Hire Companies
G2	Encourage joint booking of train travel/hire car	ST	MT	TOC/Car Hire Companies
G3	Provide train/hire car holiday 'packages'	ST	MT	TOC/Car Hire Companies
H Rail/Taxi				
H1	Provide a taxi pre booking service for all ticket holders	ST	ST	TOC
H2	Encourage the pre-booking of fixed price taxi journeys	ST	MT	TOC
H3	Provide branded taxis (in the livery of the train operating company) to promote a 'seamless' journey	MT	MT	TOC
K Links to Airports				
K1	Provide more direct bus/coach and rail links between regional/London airports and tourist areas, in particular Devon, Cornwall and Bath/Exeter and Torbay	MT	ST	Bus/Coach companies/TOC/Railtrack
K2	Investigate the potential of developing coachways, as drop off points for key destinations	MT	ST	Bus/Coach companies

Ref	Recommendations for travel within the South West	Deliverability	Priority	Responsibility
J Rail				
J1	Continue to/encourage further production of 'days out by train' leaflets by train	ST	ST	TOC/Tourist board
J2	Distribute 'days out' leaflets over a wider area and encourage hoteliers/travel agents to send these out to people booking holidays in advance	ST	ST	TOC/Tourist board
J4	Encourage discount fares for tourists during off-peak periods	MT	ST	TOC
J5	Develop a regional rail pass, allowing travel throughout the South West, on a single ticket	MT	ST	TOC
L Bus				
L1	Provide free bus timetables at tourist information centres, travel agents, hotels and other key locations	ST	ST	Local Authorities/Bus operators
L2	Produce 'personalised' bus maps that can be sent out by accommodation providers and others to customers booking in advance	ST	ST	Local authorities/tourist boards

Ref	Recommendations for travel within the South West	Deliverability	Priority	Responsibility
L3	Provide hoteliers with 'bedroom browsers' with information on public transport, including 'personalised' bus maps, timetable information, example routes to key attractions by public transport and so on	ST	ST	Local authorities/ tourist boards
L4	Provide cycle racks on buses operating on key routes (particularly those serving primary tourism destinations)	MT	ST	Bus operators/local authorities
L5	Ensure that all buses have adequate space for the storage of luggage	MT	ST	Bus operators
L6	Further develop flexible ticketing systems, allowing unlimited travel by bus in defined areas	MT	ST	Bus operators
L7	Develop a bus pass that can be used throughout the South West	MT	ST	Bus operators
L8	Further develop linked tickets allowing travel and entrance to key tourist attractions.	ST	ST	Bus operators/ attractions
M	Demand Responsive Bus			
M1	Develop demand responsive bus services to serve rural tourist areas (for example, to link camping and caravan sites to resort centres and attractions)	MT	ST	Local authorities/bus operators
M2	Include details of the demand responsive service in brochures and promotional material	MT	ST	Tourist boards/ attractions/local authorities
M3	Provide information about demand responsive buses to guests when they book	MT	ST	Attractions/ local authorities
M4	Encourage accommodation providers to provide a booking service for guests	MT	ST	Accommodation providers
N	Cycle			
N1	Encourage the development of a network of cycle hire outlets	ST	ST	TOC/ SUSTRANS/ local authorities/ tourist board
N2	Encourage partnerships between cycle hire outlets and train operating companies	ST	ST	TOC
N3	Provide joint ticketing of rail ticket/cycle hire	ST	ST	TOC/Cycle hire businesses
N4	Provide Internet booking of cycles	ST	ST	TOC
N5	Create, signpost and advertise cycle routes	ST	ST	Local authorities/ SUSTRANS
N6	Develop further networks of Quiet Roads and Greenways and support the completion of other routes such as the National Cycle Network	MT	ST	Local authorities/ countryside agency

Ref	Recommendations for the Tourist Industry	Deliverability	Priority	Responsibility
P Travel Plans				
P1	Encourage attractions to develop Travel Plans	ST	ST	Local Authorities/ attractions
P2	Provide guidance and expertise to facilitate the development of Travel Plans and promote the uptake of the service provided by EEBPP	ST	ST	Local authorities/ consultants
Q Visitor Management				
Q1	Encourage attractions to develop enhanced visitor management techniques to encourage visitors to arrive at different times	ST	ST	Attractions
Q2	Encourage attractions to include public transport information in their publicity material and offer discounts for guests arriving by public transport	ST	ST	Attractions
R Accommodation providers				
R1	Encourage hoteliers to operate more diverse change-over-days and check out times	MT	ST	Accommodation providers
R2	Encourage hoteliers to provide a 'meet and greet' service for guests arriving by public transport	ST	ST	Accommodation providers
R3	Encourage accommodation providers to offer additional services such as laundry and baggage transfer/storage	ST	ST	Accommodation providers

Ref	Other Recommendations	Deliverability	Priority	Responsibility
S Package Holidays				
S1	Further develop and market 'package holidays' to the South West, to include the simultaneous booking of accommodation and transport (coach, rail, hire car)	ST	ST	TOC/ Bus/coach operators/ accommodation/ tourist boards
S2	Develop a courier service to transport luggage from home to accommodation and provide this service as an option as part of the holiday 'package'	ST	ST	As above
T Public Transport Information				
T1	Investigate the potential of providing more advanced public transport information using mobile phone technology	MT	MT	Tourist Board
T2	Provide tourist information centres, travel agents and others with free CD ROM databases providing rail timetable information enabling them to access and print out timetable information (without the need for an Internet connection)	ST	ST	SRA
T3	Promote the Traveline information line as a means of providing tourists with a source of public transport information, using adverts in tourist brochures, at hotels, in tourist information centres, at bus/rail/coach stations, at service stations and on television	ST	ST	Various
T4	Further develop Traveline so that fare information can be made available and so that it is possible to provide information by post, e-mail or fax, as requested	ST	ST	Central Government

Ref	Other Recommendations	Deliverability	Priority	Responsibility
T5	Provide Internet based information points providing details of public transport services at key locations	MT	ST	Local Authority/ Tourist Board
U Working Together				
U1	Promote a closer working relationship between transport and tourism departments/organisations	ST	ST	Local Authority/ Tourist Board

13 Pilot Studies and Monitoring

13.1

Introduction

13.1.1

The recommendations made in this report are likely to be most effective in combination. Indeed, whilst some recommendations may seem on their own to be relatively insignificant they can, as a package of measures, make a real difference to the visitor experience and therefore to the travel choices made.

13.1.2

However, it is difficult to predict or quantify how successful the recommendations made would be in achieving these aims. Indeed, little data is available regarding the impacts of schemes already on the ground and therefore it is difficult to make any detailed assessment of their success.

13.2

Monitoring

13.2.1

In order to judge the effectiveness of the recommendations made, and to assess the 'value for money' that they offer, it is recommended that a series of monitoring activities are carried out. These could be in the form of:

- Monitoring a series of pilot studies set up to implement and monitor schemes which would demonstrate the benefits of the recommendations made in this report; and/or
- Monitoring schemes that are already in place in order to gain a better understanding of their effectiveness in contributing to the aims of this tourism plan.

13.3

Pilot Studies

13.3.1

Pilot studies should be initiated as a means of taking forward, and assessing the potential effectiveness of, some of the recommendations made in this report. In particular, the recommendations made in respect of the following main issues lend themselves to pilot studies. These are discussed in the following sections:

- Creation of cycle hire outlets;
- Development of package holidays;
- Distribution of personalised bus maps to hotels; and
- Operation of a demand responsive bus service to accommodation sites.

13.3.2

Monitoring activities of these studies should could include:

- Surveys to establish visitor behaviour and travel patterns in each of the pilot study areas prior to the implementation of schemes;
- Regular surveys of visitor behaviour and travel patterns following the implementation of schemes – to include analysis of awareness of the scheme in question;
- Surveys of people using the pilot study scheme to determine the reasons why they chose to use the scheme, how they may otherwise have chosen to travel, comments on the scheme itself and so on; and
- Monitoring of visitor numbers and users of the scheme, to include age profile and other characteristics.

13.3.3 Once data on the effect of different initiatives has been gathered, priorities may need to be altered to ensure that funds are allocated to those schemes likely to give the greatest potential benefit.

Cycle hire outlets

13.3.4 Cycle hire facilities already exist at some rail stations and in other locations. However, those cycle hire businesses that are already established tend to be individual businesses. Cycles are therefore normally required to be returned to the location from which they were hired, thus limiting the trips that can be made. Pilot studies should be set up to develop a more coherent network of linked cycle hire outlets in particular areas that would allow for more flexible routeing and hire arrangements to be made. Pilot studies could focus on two particular areas:

- Cycle hire in areas in close proximity to main railway stations (as a means of encouraging visitors to access cycle routes by train and use the railways to link journeys and make return trips); and
- Cycle hire in other areas where visitors could be encouraged to travel by a combination of cycling and other modes, in particular, bus.

13.3.5 As an example, the National Cycle Network passes close to a number of railway stations, and opportunities exist to promote cycle hire at these locations. This would help to encourage people to access the cycle network by train and, as discussed in Chapter 8, offers the opportunity of working in partnership with Railtrack and the train operating companies to develop a network of outlets.

13.3.6 This should focus on areas that are located close to established cycle routes. Possible locations for pilot studies could therefore include:

- NCN route 2 from Exeter to Exmouth via railway stations at St. James Park, Polsole Bridge, Digby, Sowton, Topsham, Lypstone Commando and Lypstone Village;
- NCN route 2 from Weymouth to Holton Heath via railway stations at Upwey, Dorchester South, Moreton, Wool and Wareham; and
- NCN route 3 from Truro to Bodmin Parkway via railway stations at St. Austell and Parr.

13.3.7

As the National Cycle Network develops other potential locations for pilot studies could include:

- NCN route 2 from Bodmin to Exeter via railway stations at Liskeard, Menheniot, St. Germans, Saltash, St. Budeaux, Keynham, Devonport, Plymouth, Ivybridge, Totnes, Torquay, Torre, Teignmouth, Dawlish Warren and Starcross;
- NCN route 24 from Southampton to Frome via railway stations at Romsey, Dumbridge, Dean, Salisbury and Warminster; and
- NCN route 26 from Dorchester to Frome via railways stations at Maiden Newton, Chetnole, Yetminster, Thornford, Yeovil, Castle Cary and Bruton.

13.3.8

A working party should be set up to take forward these pilot studies. Key organisations to involve in this group would be:

- Train operating companies;
- Sustrans;
- Local Authorities/Tourist boards; and
- South West Tourism.

13.3.9

Key tasks will be to:

- Develop working partnerships with existing cycle hire businesses;
- Set up, fund and staff new cycle hire outlets;
- Develop effective marketing techniques; and
- Monitor patronage via data collection in the form of interview and questionnaire based approaches, databases of customers and so on. This should include detailed analysis of mode of travel.

Development of package holidays

13.3.10 Pilot studies to develop and market package holidays in the South West should also be set up as a means of monitoring their effectiveness in terms of achieving the objectives of this plan. Two types of pilot study could be considered focused on:

- Travel by train; and
- Travel by coach or scheduled bus service.

Rail based package holidays

13.3.11 Train travel is likely to be the most attractive mode to 'build in' to a package holiday. Therefore it is recommended that pilot studies should focus on developing package holidays in popular and established tourist areas situated close to the main rail corridors. Appropriate locations would therefore potentially be:

- The Plymouth to Penzance corridor (including the Newquay, Falmouth, and Gunnislake lines);
- The area around Bristol, Bath and Weston-super-Mare; and
- The Exeter to Barnstaple corridor.

Bus/coach based package holidays

13.3.12 A pilot study involving travel by bus or coach should be set up as a valuable monitoring exercise in its own right, but also to provide an insight into the likely popularity/success of such packages versus those that include travel by rail.

13.3.13 Potential locations for case studies involving these modes of transport are more widespread. They should perhaps focus on areas not well served by the rail network. Possible locations could therefore include:

- North Cornwall, including Bude, Launceston, and Camelford; and
- North Devon, including Ilfracombe and Exmoor.

13.3.14 Marketing of such package holidays will be important in ensuring their success both in terms of financial viability and contribution to modal shift. Marketing and promotion should be seen as a partnership activity with each interested party contributing to the process both in terms of financial contribution and distribution of material.

13.3.15 A working party should be set up to take the project forward. This should involve the following organisations.

- South West Tourism;
- Train operating companies; and
- Local authorities/marketing bureaus/tourist boards.

13.3.16 A key task will be to develop relationships with accommodation providers to begin to build partnerships from which holiday packages can be created. Where appropriate, attractions should also be approached in order to deliver packages that include travel, accommodation and entertainment.

Demand responsive bus service

13.3.17 Demand responsive bus services are dealt with in detail in the Rural Access to the Transport System Plan. However, as discussed in Chapter 9 of this report, demand responsive buses will have a role to play in providing public transport for tourist based travel. A pilot study should therefore be set up as a means of implementing and monitoring the recommendations made in respect of demand responsive services.

13.3.18 This pilot study should focus on an area in which there is a concentrated network of tourist facilities, including both accommodation and attractions. Potential locations should therefore include areas with, in particular, large numbers of camp sites and caravan parks (as these are often situated further away from town centres and main attractions) such as:

- Dawlish Warren;
- Newquay;
- Woolacombe; and
- Looe.

13.3.19 The chosen pilot study location would be determined by the viability of potential routes in terms of route length, journey time and number of potential pick up/drop off points. The level of support gained for the concept from local accommodation providers, attraction managers and bus operators will also be important in identifying a location for the pilot project.

13.3.20 The pilot project should be taken forward by a working party involving the following key organisations:

- Local Authority;
- Bus operator;
- Tourist board/marketing bureau; and
- Accommodation providers/attraction managers.

13.3.21 In addition, the Countryside Agency could be involved and the possibility of obtaining Countryside Agency funding should be investigated.

Personalised public transport information

13.3.22 A pilot study to monitor the effectiveness of personalised public transport information for tourism trips would be beneficial. This should initially focus intensively on a small area such that personalised information leaflets can be produced and distributed for a range of different types of accommodation and attractions. Bedroom browsers should also be provided as part of the same initiative.

13.3.23 The location of the pilot study will be determined by the level of co-operation and support received from hoteliers and managers as they will be required to distribute leaflets to customers booking in advance and display leaflets in their premises.

13.3.24 The pilot studies should focus on areas where there is a concentration of tourist facilities and where these are served by reasonable public transport services. Potential locations are likely to be urban areas and could include:

- St. Ives;
- Truro;
- Newquay;
- St. Austell; and
- Falmouth.

13.3.25 As with the other recommended pilot studies, this initiative should be taken forward by a working party that should include the following organisations;

- Local Authority;
- Tourist Board;
- Accommodation providers/attraction managers; and
- Bus companies.

13.4

Monitoring of Existing Schemes

13.4.1

In order to better understand the extent to which different types of scheme may contribute towards the aims of this tourism plan, there is a need ensure that existing schemes/services are closely monitored/evaluated in a robust and consistent manner.

13.4.2

The following types of scheme should therefore be subject to monitoring:

- Branch line buses;
- Car free days out offers/packages;
- Use of cycle routes (including the National Cycle Network in the South West);
- Ticketing offers, such as 'rover' schemes and seasonal discounts; and
- Motorrail and sleeper services.

13.4.3

In addition, there is a need for specific data collection focusing on travel patterns and travel experience in a consistent manner across the whole region. Whilst some data is available, the format of this differs between local authority areas. A region wide survey of visitor travel behaviour, conducted on a regular basis, would allow comparisons to be made both over time and between different locations. This would enable comparisons to be made between different areas in which there is different availability of travel choices.

14 Summary and Conclusions

14.1 *Introduction*

14.1.1

It is clear that the tourism industry and transport services and infrastructure are closely related. In order to both promote the tourist industry in the South West and encourage the use of more sustainable forms of transport a whole range of initiatives are required. In many cases it is small improvements that will, in combination, assist the tourism industry to achieve its aims and, at the same time, help to improve conditions on the main transport corridors.

14.1.2

Much good work is already underway in the provision of services and related publicity and marketing. Many of the recommendations made in this report build on this work and these initiatives.

14.2 *Summary of Recommendations*

14.2.1

The recommendations made by this report fall broadly into three categories. These address:

- Requirements prior to leaving home (such as access to information);
- Requirements for the journey itself (such as provision of appropriate services at suitable times); and
- Requirements whilst at the holiday destination (such as the availability of public transport for the last leg of the journey or for travel around the region).

14.2.2

Arguably the first category, the requirements a potential visitor has before leaving home, are the most crucial. Indeed, the decisions made at this stage (regarding mode of transport) heavily influence travel behaviour for the duration of the stay. For example, the provision of good quality transport for the long distance journey, or the provision of public transport at the destination end is largely insignificant if information about these services is not available early enough to influence decisions made before leaving home.

14.2.3

That said, it is important that action is taken to improve facilities in each of the categories. For example, information provided at the destination end regarding opportunities for car free days out can help to influence travel behaviour at the local level.

14.3

Short Term Recommendations

14.3.1

The short term priorities identified in Chapter 12 fall generally into two categories. These are:

- Information based measures; and
- Cost and amenity based measures.

Information Based Measures

14.3.2

Information based measures are important to progress in the short term. Indeed, it is considered that the provision of more 'user friendly' information is a basic requirement for travel, and one that is particularly influential in determining mode choice. Such measures should focus on:

- Promoting increased awareness of the availability of public transport at the destination end via wider marketing, personalised timetable information, bedroom browsers and so on;
- Promoting improved systems for accessing public transport information, and better publicity for existing systems;
- Encouraging transport operators to alter timetables and develop more 'user friendly' ticketing systems and tariffs;
- Providing more advanced systems of accessing public transport information, for example through mobile phone technology and Internet based terminals; and
- Encouraging the tourism industry to be more aware of the role that they can play in providing public transport information and influencing travel behaviour.

Cost and Amenity Based Measures

14.3.3

Cost and amenity are important factors in tourism travel. Travel for tourism purposes is, unlike travel for business or other purposes, purely optional and are often based on consideration of costs (both actual and relative to motoring) and 'the journey experience'. In the short term it is therefore important to develop:

- Improved, more flexible, ticketing systems;
- Lower fares for public transport (such that they are more comparable with the perceived cost of motoring); and

- The provision of ‘extras’ to make travelling by public transport easier for tourists, such as left luggage facilities, ‘check in’ options for baggage, increased storage space and so on.

14.4

Medium Term Recommendations

14.4.1

The recommendations identified as medium term priorities generally address the following:

- Encouraging transport operators to provide new services and infrastructure;
- Encouraging transport operators to provide additional facilities, such as cycle racks on buses and additional storage space for cycles on trains; and
- Increased (and more widespread) promotion of existing travel opportunities suitable for tourist travel, such as the sleeper service, motorail and others; and
- Facilitating greater co-ordination and understanding between organisations responsible for transport and tourism planning.

14.5

Responsibilities

14.5.1

The recommendations made in this report require action to be taken by a number of different organisations. In particular, responsibilities lie with the following organisations:

- Railtrack;
- The Strategic Rail Authority;
- Train Operating Companies;
- Bus Companies;
- Local Authorities;
- Central Government;
- The English Tourism Council;
- Regional and Local Tourist Boards; and
- Accommodation providers and attractions.

14.5.2

Whilst some recommendations clearly fall within the responsibilities of individual organisations it is important to note that the majority require organisations to work in partnership with each other. Indeed, a partnership approach is essential to the successful development of a fully integrated transport system.

14.6

Funding

14.6.1

The nature and variety of recommendations made in this report make it difficult to estimate the full costs of implementation. Whilst some funding may be made available by central Government to support initiatives arising as a result of some of the recommendations made, others will need to be taken forward by commercial organisations/transport operators.

14.6.2

The recommendations made require, in many cases, both capital funding to set up new services and pay for new infrastructure (for example, demand responsive buses), and also revenue support for on-going activities (such as the production of leaflets and on-going marketing campaign).

14.6.3

Funding for some recommendations may be available through existing arrangements, for example, via the Countryside Agency. Local Transport Plan bids also offer significant opportunities to secure funding.

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Appendix A

Tourism Statistics

Appendix A – Tourism Statistics

Introduction

This Appendix presents a more detailed summary of tourism statistics at Local Authority level. The data summarised is that which was provided/obtained during the research phase of this project. It therefore reflects varying levels of co-operation experienced with different authorities to date.

Cornwall

The 2000 Cornwall Holiday Survey, reported in 'A Profile of the Visitor to Cornwall: A Summary of Results' (Cornwall Tourist Board, 2001) provides useful information relating to tourism trends and visitor travel. It shows that:

- The majority of visitors to Cornwall (in 2000), around 40%, come from London and the South East. The North and the North West and the East and West Midlands also generate a significant proportion of visitors (around 18% and 20% respectively). 12% of visitors come from within the South West region. Overseas visitors account for approximately 4% of all visitors to Cornwall. Comparison of results from surveys undertaken between 1996 and 2000 shows that these proportions have remained relatively constant over time.
- Between 1996 and 1999 family groups appear to constitute a significant proportion of visitors to Cornwall, with 3 person groups accounting for around 14% , four person groups 26% and five person groups 10% of all visitors. Two person groups are also common, accounting for around 35% of visits. (Figures for 2000 are not available).
- 1996 to 1999 figures show that the number of visitors in the 25 to 34 age group has decreased over time, from 16% of all visitors in 1996 to 12% in 1999. Conversely, it is notable that the proportions of all visitors aged over 45 has increased year on year.
- 1996 to 1999 data shows that the majority of visitors to Cornwall (around 80%) are in paid employment. Retired people make up the next largest economic group, accounting for around 14% of all visitors.
- Newquay is the most popular destination within Cornwall, accommodating around 23% of visitors in 1999 and 26% in 2000. St Ives

accommodated 15% of visitors in 2000, compared to only 4% in 1999. The data shows that tourists are highly mobile, visiting many other towns and attractions during their stay.

- The number of visitors choosing Cornwall as their main holiday destination has decreased from 69% in 1996 to 57% in 2000. Additional holidays (29%) are more important than short breaks (15%).
- 50% of visitors stay for 7 nights and 18% stay for 14 nights. 7% of all visitors visit Cornwall for short breaks of between 1 and 3 nights. 14% stay for between 4 and 6 nights. The majority of visitors stay in self-catered accommodation. In 2000, 11% stayed in hotels/guesthouses, 7% in B&Bs and 2% with friends/relatives.
- Between 1997 and 1999 the proportion of visitors travelling to Cornwall by car decreased slightly from 93% to 89%. However, in 2000 this proportion increased to 91% of all visitors. Between 1998 and 2000 coach travel was consistently used by around 4% of visitors. The number of visitors travelling by train increased from 3% in 1995 to 6% in 1999, but declined to 4.3% in 2000.
- Repeat visitors are an important source of tourism trade, with around 80% of visitors between 1996 and 2000 being repeat visitors.
- Sightseeing, walking around towns and visiting the beaches are the most popular holiday activities. 63% of people enjoy coastal walks. In 1998 16% of visitors enjoyed cycling; however in 2000 only 10% of visitors are reported in this category.
- The number of people agreeing that Cornwall is easy to get to has declined over recent years, from 77% in 1996 to 70% in 1998. Similarly, perception of congestion is changing, with 50% of visitors agreeing that the roads are un-congested in 1998, compared to 58% in 1996. Around half of visitors agree that parking charges are reasonable; however, this number has decreased slightly in recent years.

Devon

Tourism Trends 2000, produced by Devon County Council, provides information on tourism activities.

- In 2000, a total of 32,081,600 tourist nights were spent in Devon. 21% of these were in August, 16% in July and 12% in both June and September. A significant proportion of visitors also arrive in April, May and October (each accounting for between 8 and 10%).

- Torbay is the most popular (district) destination, followed by North Devon, East Devon and South Hams.
- Tourist spending in 2000 generated £381.2 million income.
- Dartmoor and Exmoor National Parks generate 1,243,900 tourist nights.
- Middle aged couples (with no children) constituted the majority of the business of 46% of serviced accommodation providers in 2000. Retired people were the most important group for 31% of businesses, whilst young people are the most important group for 13% of businesses. Families with young children are the most important sector for only around 5% of serviced accommodation providers. However, this group is the most important sector for 33% of providers of self catering accommodation (flats and houses) and 55% of camp sites and holiday parks.

Torbay

During July 1999 Torbay Council commissioned a tourism survey in which 878 tourists were interviewed at various key tourist locations and tourist attractions around Torbay. It shows that:

- The majority of visitors in Torbay in 1999, around 30%, came from London, Eastern England and the South East. The North of England, and the East and West Midlands also generate a significant proportion of visitors (around 22% and 27% respectively). 13% of visitors come from with the South West region with 6% from Wales and 2% from Scotland. Overseas visitors account for approximately 3% of all visitors to Torbay.
- Of those interviewed 13% were under 29 years of age, 41% were aged between 30 and 45 years and 32% were between 46 and 60. 14% of interviewees were over 60 years of age.
- The 1999 data shows that the majority of visitors to Torbay (around 80%) are in paid employment. Retired people make up the next largest economic group, accounting for around 14% of all visitors.
- The data shows that tourists are highly mobile, visiting many attractions and areas around Torbay during their stay.
- 74% of visitors stay for up to 7 nights and 23% stay for 14 nights, with 3% staying for more than 14 nights. The majority of visitors, 74%, stay in self-catered accommodation. In 1999, 6% stayed in hotels, 4% in B&Bs and 7% with friends/relatives.

- In 1999 the proportion of visitors travelling to Torbay by car was 77%. However, 12% travelled by coach and 9% by train. 2% travelled by other unspecified modes.
- 62% of tourists interviewed stated that they use their car as their main mode of travelling to attractions and other destinations whilst on holiday. 21% use local bus services to travel around the area whilst on their holiday and 10% prefer to walk around the area whilst on holiday. 7% use the train, taxis, coaches and other unnamed modes to travel around the area.
- 78% of tourists have access to a car at all times whilst on holiday in Torbay, whilst 22% interviewed did not have a car and thus were reliant on walking or using local public transport services. Only 5% of tourists interviewed had brought bicycles on holiday with them to use to travel around the area.
- Only 7% of those interviewed had used local train services but 28% had used local bus services. On questioning about the standard of local bus services 4% thought local buses were excellent and 17% thought that they were good. 6% thought buses were fair and 2% thought bus services were poor. 72% had not used nor intended to use local bus services.
- 8% of the 878 people interviewed had heard of the local public transport visitor ticket and only 2% of tourists questioned had used the ticket. 23% of those interviewed had heard of the 'Round Robin' Torbay to Dartmouth steam train, ferry and bus round trip ticket but only 2% had actually used the ticket or the service.
- The proportion of people who use modes other than car to travel around Torbay whilst on holiday varies considerably from attraction to attraction based on the location of the attraction in relation to tourist holiday accommodation.

Plymouth

The report 'Economic Impact of Tourism in Plymouth' (South West Tourism, 2001) shows the following trends:

- Plymouth receives 787,000 staying visitors per year (of which 93% are domestic visitors and 7% are from overseas). Overseas visitors tend to stay longer, accounting for 18% of visitor nights, and also spend more, accounting for 22% of expenditure by staying visitors.
- Plymouth receives 4 million non-regular day trips from home (within, as well as to, the city). These account for £108.7 million in spending.

Holiday visitors staying in Plymouth make 485,730 day trips out of the city annually, spending approximately £7.2 million.

- The average length of stay in Plymouth is 3.7 nights.
- 43% of domestic staying trips to Plymouth are to visit friends and relatives. 31% are holiday trips, and importantly (compared to other areas in the South West) 22% are for business.
- Total spend by UK visitors, overseas tourists, and day trips equals £308.2 million, of which £54.9 million is spent on transport (including parking, petrol and fares). 60% of this accrues to Plymouth as the destination area.
- Tourism in Plymouth supports 5,226 full time equivalent jobs. In addition, a further 1,567 full time equivalent jobs are indirectly supported as a result of multiplier spend. It is estimated that 10,669 actual jobs are supported by tourism, 72% of them directly.

Bath and North East Somerset

The 'Bath Visitor Survey 1999' presents the results of a face to face interview survey undertaken between April and September 1999. This provides up to date information on the profile of tourism in Bath. The surveys shows that:

- 38% of visitors to Bath stay overnight, whilst 28% visit for the day only (from home) and 34% are day visitors on holiday (visiting from holiday bases outside of the city).
- 82% of groups visiting Bath contain adults only. Visitors to Bath are generally older, 47% aged 45 or over and 30% aged 25 to 44.
- Three-quarters of respondents are classed as ABC1s, suggesting that Bath attracts a higher proportion of affluent people than other destinations in the South West.
- 41% of visitors staying in Bath are from overseas compared to less than 10% in areas such as Devon and Cornwall. The largest proportion of staying visitors originate from Greater London (7%) and Wales (5%).
- 23% of day visitors from home come from Wiltshire, 15% from Somerset, and 13% from Bristol. 45% of day visitors on holiday are from overseas.
- Short breaks are important. 74% of staying visitors stay for between 1 and 3 nights, 19% for 4 to 6 nights and 8% 7 nights or more. The average length of stay is 3 nights.
- 53% of all visitors travel to Bath by car, van or motorcycle. The proportion of staying visitors travelling by these modes is less than day

visitors from home/on holiday (44% compared to 54% and 63% respectively).

North Somerset

- Weston-super-Mare is predominantly a day-visit resort, generating around 3.3 million day visitors and 3575,00 staying visitors in 2000.
- In 2000, tourism generated £151.7 million for the local economy (£102 million direct expenditure on accommodation, food, drink, recreation , shopping and transport) and provided jobs for over 4,000 people in the area (3099 directly related).
- The most important age group is the under 25s, who account for 32% of tourists. Data shows that the number of visitors in this age group have increased significantly in recent years, perhaps reflecting the attraction of Weston to family groups. This pattern is very different to Devon and Cornwall where this age group is decreasing in importance.
- 34% of tourists originate from within the West Country. The Midlands is the next most important area of origin, accounting for 33% of visitors in 2000 and 45% in 1999. London and the South East account for 18% of all visitors. Again, this pattern is notably different from that experienced in Cornwall. Only 1% of visitors are from overseas.

Appendix B

Issues raised by Local Authorities

Appendix B - Issues raised by Local Authorities

Cornwall County Council

- Visitors to Cornwall come primarily from London and the South East (42%); therefore the A30/A303 is an important route for the tourist industry. The Council's view is that a dual carriageway route along this corridor would be beneficial in terms of attracting visitors to the County.
- The A30 is perceived as the main route into Cornwall by the vast majority of visitors. Conditions on this corridor are therefore important to the tourism industry.
- Cornwall is increasingly becoming a short break destination. Given the length of stay (typically around 3-4 days) travel time is important and the car is seen as the quickest and most convenient mode of transport (accounting for 91% of trips).
- Cornwall County Council is keen to focus on promoting the use of sustainable modes of transport for travel around the region. This is seen as a more realistic ambition than focusing on the mode of travel used by tourists to access the County.
- The provision of car hire to link with rail is not a priority. The County Council would prefer to develop links between rail and other modes. Car hire is seen as most important for business travel and in combination with arrival at regional airports.
- Improvements to rail infrastructure and services are required if rail is to offer an attractive and realistic alternative to the private car for tourist and leisure trips. Cornwall County Council has 3 priorities in this respect. These are signalling schemes to improve path times, reducting of track between Probus and Burngallow and to achieve a 30 minute frequency on the Falmouth to Truro branch line.
- However, the County Council recognises that for tourists, quality of service and reliability are often more important than overall journey time.
- Many of the problems regarding rail travel in Cornwall are perceived to have arisen because train operating companies concentrate resources in the South East where services are more profitable. If the potential of rail travel is to be maximised as a mode for tourist travel it is important that rolling stock is of a good quality and that timetables are maintained.

- Development of the branch lines is seen as an important means of encouraging travel by rail.
- A longer term aspiration is to create a direct branch line link between St. Austell and Newquay.
- Cornwall County Council are also keen to develop 'branch line buses'. The Helston branch line and the Eden branch line are seen as a successful schemes and good models for future services.
- There is a clear need for more joint ticketing arrangements. Bus links to the Eden project operate a successful joint ticketing initiative between Western National and Truonian (transferring at St. Austell).
- The 'Riviera Project' has recently carried out improvement works at branch line stations.
- The South West Coastal Path and the Cornish Way (part of the National Cycle Network) are major assets to the County. They offer great potential for encouraging 'car free days out' from many larger towns/resorts.
- The tourism business generated by Cruise Liners is welcomed. Whilst this market does not reflect a mode shift it is seen to be a 'sustainable' means of arriving in the County. Access to ports by coach is often problematic.
- Air travel accounts for a small percentage of the mode of travel used by tourists. However, the County Council feel that there is huge potential for growth in this market.
- A direct air link between Newquay and Heathrow is perceived as necessary for this aspect of the industry to grow. At present, flights into Newquay depart from Gatwick.
- Cornwall is increasingly marketing itself as a destination for special interest holidays. Walking and cycling are popular – there is great potential to encourage these groups to travel by public transport as this provides the opportunity for linear trips. The local rail network is important in this respect as it links with the Cornish Way at a number of locations.

Devon County Council

- The Devon Rover ticket is due to be available from April 2002. This will be accepted on all bus services in the County at a cost of £6 for adults, 50p for accompanied children, £4 for a single child and £5 OAPs.
- The Traveline initiative is welcomed. Devon County Council promotes the call centre number on its TravelWise information boards. The Devon County Council public transport information line is still operational as there are concerns regarding the amount and accuracy of local information

that can be provided by Travel Line. Travel Line is not able to send out public transport literature. This is seen as a major drawback.

- The Dartmoor and Tamar Valley Sunday Rover ticket is now available all year round (previous years summer only). This allows unlimited travel around the moors on Sunday and selected bank holidays.
- There is a need to raise awareness of public transport opportunities amongst attractions and accommodation providers. Devon County Council's publicity group is encouraging tourism businesses to include public transport information in their own literature.
- The Devon bus timetable has recently been renamed the 'Devon Discovery Guide' in an attempt to make it more attractive and encourage people to make a more conscious effort to leave their car behind.
- The County is planning to launch a Devon Bus Drivers Award.
- On the Tamar Valley line bus drivers also act as guides, providing information and assistance to passengers. This type of service is attractive and useful to tourists.
- The cost of car hire is likely to make it unattractive to domestic tourists.
- The Buckfastleigh Vintage Bus operates a successful tourist based service linking a number of attractions. This is funded largely by the attractions themselves. It is an attempt to encourage visitors to stay longer and visit a number of attractions.
- Dartmoor National park have considered banning cars from certain sites – this has raised local opposition
- The Devon Bike Bus was a Devon County Council concept, in collaboration with the Countryside Agency. It was funded jointly by Devon County Council (through the Rural Bus Grant) the Countryside Agency and Dartmoor National Park. This was a summer only service (operating every day, except Monday), paralleling and criss-crossing the Devon Coast to Coast Millennium Cycle Route between Ilfracombe and Exeter, via Barnstaple, Bideford, Great Torrington, Hatherleigh and Okehampton. The buses carried up to 21 passengers and 8 cycles. This service no longer operates. Whilst it was a good concept that raised much local support and interest, the number of passengers carried by the service was low. Pre-booking was not available. This seems to have dissuaded people from using the service as they were offered no guarantee that there would be space available for their cycle. Frequency and reliability (old vehicles) also appear to have been a disincentive to users.

- In 2002 it is hoped to introduce a new scheme on the main A386 road, parallel to the Coast to Coast cycle route. All buses will have rear cycle racks.
- However, as a long term ambition officers would like to see all buses with capacity to carry cycles.
- Walking and cycling holidays are important to the tourism industry in Devon. Private operators, offering services such as baggage transfer, can that make it easier for people to travel without their car.

Bath and North East Somerset Council

- There are four Park and Ride Sites on the outskirts of Bath. There is a clear need for a further Park and Ride Site on the A46/A4 and this is being promoted strongly by the Council. A site on this route would cater both for commuters and visitors. The Council would like the site to include a satellite tourist information centre.
- Many overseas (especially American) visitors to Bath use the Brit Rail pass offering unlimited travel on British railways. However, this must be purchased before arrival in the UK.
- Bath and North East Somerset Council has promoted a series of walks linked with public transport. These have been successful.
- Increasingly, Bristol International Airport is becoming an important 'gateway' to the South West. However, public transport links between Bath and Bristol International Airport are problematic. It is not possible to purchase a through ticket between Bath and the airport (via Bristol Temple Meads) and National Express Coaches do not connect. A direct rail link between Bath and Bristol International Airport would be beneficial to the tourism industry.
- Heathrow is also an important 'gateway' for visitors to Bath. National Express operate a direct service. The Heathrow Express also offers an alternative. Flight Link coaches (offering a faster service than National Express), operates between Heathrow and Bristol but do not call at Bath. Bath and North East Somerset Council would welcome this service calling at Bath as it would provide a link from Heathrow taking two and a half hours, compared to the three and a half hour journey time currently operated by National Express.
- The October 2001 half term holiday was staggered over a three week period. This was noticeable in Bath, with less congestion and business spread over a longer period than has been the case in the past.

- Variable Message signing could be beneficial to tourists arriving in Bath by car via the M4. This could direct traffic via the A4 or A46 depending on traffic situations.
- The Bath Spa project, funded by the Millennium Commission, is currently underway. This includes the restoration of five historic buildings and the re-opening of the spa for bathing. The project, due to open in October 2002, will make no provision for car parking on site. This project therefore provides an incentive to encourage travel by more sustainable forms of transport.
- Bath and North East Somerset Council is keen to look at using more environmentally friendly buses which may be more appealing to tourists. These should be branded and form part of the visitor experience.
- Bath Backpackers provide a left luggage facility. This facility would be more useful if it were located at the train station.
- Bath and North East Somerset Council were pro-active in setting up the Cotswold Link Bus Service from Bath to Stratford, in conjunction with Gloucestershire County Council. This was an attractive service linking with the Cotswold Way, running twice daily. Gloucestershire County Council withdrew funding for this service after two years.

Plymouth City Council

- Plymouth is growing as a day trip destination.
- The City Council is keen to direct visitors to 'reception points' on the East and West sides of the City.
- The physical separation of the rail station from the town centre and the bus station is a particular challenge.
- The City Council is keen that public transport becomes part of the visitor experience.
- The City Council would like to install terminals around the City to provide visitor and transport information.
- Motorail does not stop at Plymouth. However, if the service were to call at Plymouth it is unclear whether this would offer any real benefits to the immediate area. The ferry port does not bring in a great deal of tourism business as it functions simply as a gateway to other parts of the region. Motorail would potentially have the same effect.
- A long term ambition is to create a 'smartcard' system that could be used on public transport, for entrance to attractions and in shops.

- Real time bus information would be beneficial to the tourism industry, providing reassurance to people not familiar with the local area/transport system.
- Plymouth has experienced difficulty in obtaining European funding for some transportation projects. Transport projects, having benefits for tourism (and therefore for economic development) are perceived as likely to more readily attract European funding. There is a need for more joined up thinking between transportation and tourism units in order to obtain funding for mutually beneficial projects.
- Funding is available through the Local Transport Plan for information points to be created around the city. These could be linked to tourist information.
- The conference market is a growth area. However, Plymouth suffers in attracting conference and business trade because it is perceived as being a remote and 'difficult to get to' destination. Substandard rail links contribute to this perception.
- Plymouth City Council has experienced problems in working with Railtrack to improve the rail station.
- The City Council is keen to revise its tourism signing strategy. It would like to rationalise signing and group attractions into areas.
- The Park and Ride services cater for only a small number of visitors. The City Council would like to encourage visitors to use Park and Ride more. Capacity of car parks is an issue.
- There is a need to develop an integrated transport and visitor information programme.

North Somerset Council

- Weston-super-Mare is perceived as a car orientated destination. 3,000 cars can be parked on the beach – this availability means that there is little incentive for visitors to travel by alternative modes.
- Train fares to Weston-super-Mare are increased in July and August as a way of managing demand on the local rail network.
- Visitors spend, on average, about £30 per day. The cost of train travel often exceeds the budget of many visitors.
- North Somerset Council would like to see two trains per hour between Weston-super-Mare, Bristol and Yate. Whilst it is recognised that this service is required primarily to meet the needs of commuters it would also have benefits for the tourism industry. Currently, the off peak service is

poor, often meaning that journeys are pushed into the peak period (when trains are more crowded and fares are more expensive). An enhanced service on this line would provide greater opportunities for leisure travel in the off peak period. Additional stops would also give more areas of Bristol direct access to Weston-super-Mare, and therefore potentially encourage more day trips.

- Improvements to the Virgin Cross Country service will have benefits to the tourism industry. This service currently operates three trains per day. Frequency will be increased to a two hourly service from Autumn 2002. This is likely to encourage additional trips by train.
- Past initiatives to cater for visitors arriving without a car include the Heritage Bus. This connected three attractions in a circular trip. The service was privately funded with publicity co-ordinated by North Somerset Council. This initiative was not successful, largely because fares were too high. It was intended that this service would have a commentary (as a means of 'adding' to the visitor experience) but this was not installed.
- A more successful scheme connects Bristol with Chew Valley Lake. In conjunction with Bath and North Somerset Council, a successful bid was made for Rural Bus Challenge funding. This service operates a dual function, both improving access from rural areas into Bristol and also encouraging day trips from Bristol. Vehicles operating on this service are new and also have cycle racks attached.
- Real time public transport information would help to encourage visitors to travel more sustainably, as it would help to build confidence in the system.
- Worle Parkway has potential to become a Park and Ride Station for access into Weston-super-Mare.
- Bus based Park and Ride has been considered previously for Weston-super Mare. Given that Weston is considered to be a car based resort, Park and Ride is perceived as inappropriate. For many families, Weston is chosen as a destination because it offers easy and convenient parking.
- Any reduction in parking provision/capacity would be likely to harm the tourism industry.
- Coachways for Weston are also perceived as inappropriate. Many visitors arriving in Weston have to change at Bristol. Additional interchange would be likely to act as a disincentive to coach travel.
- Links to Cardiff and South Wales are important. There used to be a ferry service between Cardiff and Weston-super-Mare. If this was re-instated it could be marketed as part of the visitor experience.

- Motor-rail linking Bristol/Weston-super-Mare with the Midlands and North could be beneficial in terms of attracting visitors.

South West Tourism

- Use of public transport by tourists requires special consideration as it is, in many ways, very different to use of public transport by other groups. For the tourist, use of public transport is entirely optional and as, such, tourists are often more fickle than other users. Nationally, public transport is not focused on the leisure market; thus when visitors arrive at their destination they often find that services are focused exclusively on the needs of residents.
- Transport requires 'product planning'. It must become part of a 'package' and must be seen as an integral part of the visitor experience (as for example, Eurostar is). Travelling by public transport must be seen as a more enjoyable experience – the 'scramble to the train' should be eliminated.
- The recently introduced Newquay to Stansted air service has been well received by the tourism industry in the South West. Many tourist organisations are keen to promote the service and link into the opportunities that it offers for their visitors. The low cost of the service is a selling point in its own right. Conversely, accommodation providers and others are not prepared to put their reputation on the line by recommending that their visitors travel by train as the services are seen as unreliable.
- South West Tourism supports the concept of further developing package holidays (inclusive of transport) to the region. These should be focused on appropriate destinations (for example, areas close to rail stations or with other good public transport links). It is important to work with the industry to develop these and make it easy for the industry to become involved. Package holidays are likely to appeal to particular markets, for example luxury breaks that include gourmet meals on the train.
- South West Tourism considers that the most important aspect is to ensure that services are in place. 'Hearts and minds campaigns' are considered to be unnecessary, as public transport services should 'sell themselves'.
- 'Branded trains' are a good selling point and should be considered as part of the strategy. These help to 'add' to the visitor experience. Similarly, the introduction of a 'tourist class' for travel by train could be beneficial – this

could include a facility to check in luggage, an area providing entertainment for children and so on.

- Car hire for tourists (for example at rail stations) is considered to be a good idea as it provides a choice and offers assurance that transport will be available at the destination end.
- Demand responsive buses serving accommodation (camp sites in particular) areas are considered to be a good idea. However, it was noted that increasingly, offer mini-bus and taxi services to guests.
- If tourists are to make better use of buses, timetable and route information needs to be made clearer and easier to understand. For example, symbols could be developed to indicate service frequency. These could be shown on leaflets and promotional material. For example, a symbol (like the disabled access sign) could be developed and used to draw attention to the fact that an attraction/hotel is served by a 15 minute frequency bus service.
- SMS text messaging is a good way of passing on public transport information. If text messages could be sent to people as they arrive in an area (as they are when travelling abroad) these could provide advice on how to access public transport information (for example, local telephone numbers).
- Working parties should be very focused in their purpose and should ideally be set up to progress individual projects/pilot studies. South West Tourism has been involved in regional working parties in the past and these have been largely unsuccessful.
- It is important that the tourism industry is committed to promoting the use of public transport. To ensure this, it is important to demonstrate that this can be profitable. Pilot studies should demonstrate financial viability in this manner.

Appendix C

Tourism Workshops

Appendix C – Tourism Workshops

Introduction

Workshop sessions were held during November 2001 to brainstorm tourism issues. Workshops were held in the following locations:

- Newbury;
- Swindon;
- Salisbury;
- Bristol;
- Exeter;
- Plymouth; and
- Truro.

The main findings from each of these sessions are reported in this Appendix.

Newbury Market Street Council Chamber 5th November 2001

- Rail fares for tourists are too expensive.
- There is a lack of public transport information, both at the origin and destination ends.
- People feel in more control when using their own car.
- There are no facilities to carry large loads of luggage or bicycles on public transport.
- Tourists perceive that there is a lack of public transport at the destination end.
- There is a lack of local information at the origin about public transport services at the destination end.
- The tourism market needs to be segmented to cater for caravaners, OAPs, weekenders, cyclists etc....
- Motorail should be provided to Scotland and the North of England.
- More incentives should be provided for families to travel on FGW trains. At the minute it is very expensive for families to travel on their peak services.
- There should be improved marketing to promote what facilities and services are at the destination end.

- Travel should be made as easy as possible with inter ticketing and interchange facilities.
- Fly drive should be promoted for longer journeys with car hire at airports and stations.
- There needs to be more facilities for cycle hire at rail stations.
- A return of luggage vans on trains would be welcome to look after large amounts of luggage.
- Call centres should be used alongside websites as people appreciate personal contact for reassurance.
- Alternatives provided should be as convenient as using the car.

Swindon STEAM Museum 6th November 2001

- Swindon and North Wilts is 'over promoted and under sold'.
- Swindon is the home of the railways and a good place to base a holiday. There should be more hotels and infrastructure in place to encourage this.
- The Great Western mainline may become a world heritage site in the future, based in Swindon.
- The areas around Swindon are very attractive with lots of culture.
- The cost of travel and accommodation needs to be addressed. Tourists should be able to use buses and trains without spending too much money.
- Incentives should be specifically introduced to the different tourist markets, business travellers, families, educational, overseas tourists and day-trippers.
- Public transport travel should be convenient and cheap with improved access to information.
- The reliability of public transport is very important.
- Special incentives should be provided for families and group travel.
- There should be some long term considerations given to trams.
- Swindon should provide better signage for tourists.
- Public transport information should be easy to understand thereby making journeys a lot less stressful.

Salisbury, The Guildhall 7th November 2001

- Local landscape should be protected for tourists.
- Public transport is a big factor in how tourists travel; it needs to be user friendly, with good information, integrated with capacity to take bicycles and luggage.

- There should be adequate parking for bicycles and cars at rail and bus stations/stops.
- The public transport summer season is a lot shorter than the actual summer season, no services run in the off season.
- Walking routes and buses are not integrated.
- Historic rights of way for bridleways and footpaths need to be preserved and kept intact without severance.
- Parking should be free at rail stations and bus stops.
- Public transport should have a lower cost with high cost disincentives towards private car use.
- Local tourism should be encouraged to get local people in their spare time not to travel so far for tourist activities.
- More 'Quiet Lanes' should be designated to walking, cycling and horse riding routes, due to vibration and noise from cars and HGVs.
- Regional public transport information needs to be easily available on the Internet; it is however recognised that not everyone has access to the Internet so other information sources need to be developed (call centres, mail shots).
- Public transport ought to be cheaper.
- Buses only spend 5% of their income on marketing. This should be increased to promote the comfort and relative cost of public transport. The Government Office should take responsibility to make it happen.
- Taxis have to take a more important role in rural areas at the weekends and in the evenings.
- The Wigglybus service in Wiltshire needs to be extended; however, Wiltshire buses are running on poor quality contracts, with poor services and poor quality. The County Council has to be convinced of the deliverability of an improved Wigglybus service.

Bristol, Thistle Hotel 8th November 2001

- 'Little things make a big difference' over all ages and disabilities.
- Interchanges are key, they should be to the same standard as airports, with no stairs and help available with luggage.
- More porters should be on standby to help everyone when needed.
- Ramps should be on the side of the train to help with wheelchairs and buggies - means that there would be no more 'minding the gap'.
- Information about bus services is required at both the origin and destination end.

- More face to face local information needs to be complemented by Internet and telephone information services.
- More taxis need to be wheelchair accessible.
- Public transport services should be as direct as possible.
- Local public transport ought to interact with the footpaths, especially where there are walking holidays.
- More warm welcomes and the development of a people service.
- Opportunities to send luggage down on an earlier train and meet it in the hotel or at the destination train station.
- Bring back left luggage lockers.

Exeter, Thistle Hotel 13th November 2001

- 85% of tourist trips are made by car. Realistically it won't change dramatically, however measures could be introduced to help influence the modal shift.
- The tourist industry needs to improve marketing and the detail of the actual packages offered.
- The tourist trade needs a champion to co-ordinate tourism and car free tourism.
- People need confidence to leave the car at home i.e. there are going to be public transport services to meet their needs.
- Cheap tickets should become more flexible, e.g. the Dartmoor Sunday rover ticket that can take you across Dartmoor into the far South West.
- A return of left luggage facilities.
- Real time information should be available to instil confidence in the network across at a strategic level.
- Car hire at facilities at rail stations could become part of cheap packages if booked in advance - it still retains a certain amount of flexibility for the tourist.
- Bicycles should also be available to hire at rail stations.

Plymouth, Guildhall 14th November 2001

- Park and Ride should be relevant for tourists and for workers; the P&R facilities need to have improved signing, clear indications of cost, easily accessible, clean and with more marketing.
- Tourists need to have public transport information at both the origin and destination ends of their trip.

- Timetables must become more co-ordinated between buses and trains, 2 way.
- There should be more space on trains for luggage, pushchairs, disabled people and bicycles.
- All public transport staff must become more receptive to customers needs.
- Rail stations and tourist attractions need to have more parking and facilities for cyclists, including left luggage lockers.
- More call centres need to be developed to offer tourists and local residents advice on what services are on offer.
- Villages and towns must improve their signage.
- More conductors on buses and trains to help out with questions and luggage.

Truro, Alverton Manor Hotel 15th November 2001

- 85% of tourists travel by private car.
- 41% of tourists travel from London and the South East.
- There is significant 'bunching' of trips on the traditional Saturday changeover day.
- First Great Western ought to do more to market their motorail service.
- Public transport information for the return trip should be available from the journey origin.
- Tourist attractions should invest in shuttle buses to pick up tourists from bus/rail stations e.g. the Eden project. Or park and float at the maritime museum.
- The A30 needs improvement.
- Cornwall will be experiencing a surge of academic tourists, following the Cornwall Combined Colleges University at Penryn.
- Planners need to move towards integrated transport ideas. More investment and revenue is required for pioneering and innovative plans.