

Western Region Tourism Partnership

Visitor Management System & Sustainable Transport Services

April 2009

Final Report



TRANSPORT
TRAFFIC
DEVELOPMENT
PLANNING
URBAN DESIGN
ECONOMICS
MARKET RESEARCH

Visitor Management System & Sustainable Transport Services Final Report

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Contents

Summary	1
1 Introduction	4
1.1 Background	4
1.2 Definitions	4
1.3 Aims and Objectives	5
1.4 Structure of the Report	6
2 The Tourism Market	7
2.1 Overview	7
2.2 Overseas Visits to the Island of Ireland: Some Key Facts	7
2.3 Tourism in Northern Ireland: Some Key Facts	8
2.4 Western Region Tourism Partnership	9
2.5 Identifying a Visitor Profile for the Western Region	11
2.6 Selecting the Visitor Attractions	11
2.7 Identification of Gateways and Hubs	14
3 Best Practice Review	17
3.1 Overview	17
3.2 Northern Ireland	17
3.3 Rest of the UK	20
3.4 Republic of Ireland	25
3.5 International	26
3.6 Summary	33
3.7 The Toolkit	35
4 Transport Audit	36
4.1 Overview	36
4.2 Existing Transport Services	37
4.3 Direct Connections between Gateways and Visitor Attractions	39
4.4 Connections between Gateways and Hubs	41
4.5 Connections between Hubs and Visitor Attractions	46
4.6 Private Transport Services	58
4.7 Summary	65
5 Stakeholder Consultation	66
5.1 Overview	66
5.2 Transport Providers	66
5.3 Tourism	68
5.4 SWOT Analysis	70
6 Preliminary Strategy	73
6.1 Overview	73
6.2 Aims and Objectives	73
6.3 Mobility Management for Tourism	73
6.4 Promoting Cycle Tourism	74
6.5 What are the Main Types of Cycle Tourism?	75
6.6 Developing Bus Routes to Access Attractions	76
6.7 Coordinating Bus Services	85
6.8 Improving Facilities for Tour Coaches	85
6.9 Rural Transport Schemes	85
6.10 "Sustainable Tourism Travel in the Western Region" Guide	86
6.11 Integrated Ticketing	87
6.12 Monitoring	87
7 Conclusions and Recommendations	88

7.1	Conclusions	88
7.2	Recommendations	88
	Appendix A: List of Attractions	90
	Appendix B: Bibliography	91
	Appendix C: List of Consultees	92
	Appendix D: Copy of Consultation Letter	94

Tables

Table 1.1:	Study Aims and Objectives	6
Table 3.1:	Translink Rambler Services – Passengers per hour analysis	18
Table 4.1:	Number of attractions within catchment of the Hubs in the Western Region	44
Table 5.1:	Tourism Transport - SWOT	71
Table 6.1:	Bus Route 1 - Belfast - Dungannon – Ballygawley – Enniskillen – Belleek – Belcoo (Return)	77
Table 6.2	Bus Route 2: Dublin – Ballygawley – Omagh – Strabane – Derry City – Belfast	80
Table 6.3	Bus Route 3: Dublin – Ballygawley – Omagh – Cookstown – Magherafelt – Derry City/Belfast	83

Figures

Figure 2.1:	Map of the Western Region and Visitor Attractions	13
Figure 2.2:	Location of Gateways and Hubs	16
Figure 3.1:	Rambler Services in the Western Region	19
Figure 3.2:	Snowdonia Region and Attractions	23
Figure 3.3:	Dales Bike Bus	24
Figure 3.4:	Arcadia Park Bus Routes – Journey Planner	27
Figure 3.5:	Talerbus Travel Guide	31
Figure 4.1:	The Hierarchical Approach to Accessibility	37
Figure 4.2:	Connections between Gateways and the Western Region	40

Figure 4.3:	Percentage of attractions served directly by public bus/rail	41
Figure 4.4:	Frequencies of bus services from Gateways to Hubs in the Western Region	43
Figure 4.5:	Attractions within a 4-mile radius of Hubs	45
Figure 4.6:	Distances to attractions from nearest Hub	47
Figure 4.7:	Available modes for making connections between Regional towns and attractions	48
Figure 4.8:	Weekday frequency of bus services to attractions	49
Figure 4.9:	Weekend frequency of bus services to attractions	50
Figure 4.10:	Modes by which attractions can be accessed	52
Figure 4.11:	Proximity of attractions to a designated cycle route	54
Figure 4.12:	National Cycling Network in Northern Ireland	56
Figure 4.13:	Proportion of attractions visited by tour buses	58
Figure 4.14:	Proportion of Attractions within the catchment of an Hub served by private tours	60
Figure 4.15:	Tour Routes in the Western Region	62
Figure 4.16:	Airporter Routes	64
Figure 4.17:	Accessibility of visitor attractions in the Western Region	65
Figure 6.1:	Proposed Route 1	78
Figure 6.2:	Proposed Route 2	81
Figure 6.3:	Proposed Route 3	84

Summary

Introduction

Colin Buchanan was commissioned by the Western Region Tourism Partnership of Northern Ireland, to undertake a *Visitor Management System and Sustainable Transport Services* study. The purpose of the study was to find ways to encourage and enable a wider dispersal of visitors from the honey-pot destinations in Northern Ireland across the Western Region, maximising the length of stay and unlocking the potential for growth in tourism in the Region and the province as a whole. This initiative reflects the growing recognition of the importance of tourism to the Western Region and the contribution that tourism makes to its economic and social prosperity.

The Tourism Market

This section reviewed the existing Tourism Market for the Western Region. As part of this we reviewed the existing priorities of Tourism Ireland, the Northern Ireland Tourist Board and each of the partner organisations within the Western Region Tourism Partnership area. This helped to identify a visitor profile for the Western Region confirming:

- The importance of the domestic market.
- The importance of the V.F.R. (Visiting Friends and Relatives) market.
- Great Britain is the most important overseas market (61%)
- 58% of visitors from Great Britain arrive in Northern Ireland by air, 32% by sea and the remaining 10% arrive via the Republic of Ireland.
- 57.5% of visitors from other overseas destinations arrive via the Republic of Ireland.
- Family groups, couples and empty nesters are all important sectors within both the domestic and the R.O.I. markets.
- Sightseeing and cultural tourism are both important to the overseas market.

Best Practice Review

The review of national and international best practice has proved to be a very useful exercise in identifying sustainable transport products and/or services for improving access to visitor attractions. Products and services can be broadly defined by the following groups:

- Ticketing/Fiscal measures
- Provision of Information
- Marketing and Promotion
- Integrated transport services
- Private transport services

Transport Audit

An extensive audit of the existing transportation provision in the Western Region revealed the following key findings:

- 36% of the attractions are currently served directly from Gateways (entry points to the country)
- Over 45% of the attractions in the Western Region can only be accessed by car/taxi from the nearest Hub (access point to the Western Region)
- Less than one in five of the attractions in the Regions are served by tour buses.

Stakeholder Consultation

A total of 52 stakeholders were identified and a letter was issued to each in advance of a telephone interview which discussed the study. Stakeholders from public bus operators, private tour operators, attractions and tourism centres were contacted and the following are some of the key points found:

- More dialogue and a closer working relationship with tourism agencies is needed if bus services are to be fully integrated into the visitor management process
- There was a consensus among the Translink regional managers that there are no apparent barriers or obstacles in developing new services
- There appears to be a willingness among public transport operators to better utilise existing services which will benefit tourism transport in the Western Region
- The private tour operators had concern with the lack of integration between private and public transport services
- There was a consensus among the private operators that marketing was a crucial element of the success of their services
- There was also a consensus of opinion from Tourism Information Centres that the NITB was too focused on 'signature' projects, at the expense of the smaller regional attractions
- Many tourists use public transport as their principal means of transport as car hire was often relatively expensive.
- There was a general feeling amongst the tourist information centres that visitors would have to be "very determined or resourceful if they wanted to see what the Western Region had to offer".
- Most tourism centres had similar concerns that the overall quality and coverage of the existing transport network is not "up to standard" nor able to support visitor demand.
- This previous point contrasted starkly with that of public transport operators who felt that their services were currently adequate for visitor demand

Preliminary Strategy

The preliminary strategy is based on the audit of existing transportation provision, the review of best practice which revealed a possible 'toolkit' of measures to improve sustainable tourism travel; and feedback from the stakeholder consultation.

The proposals focus on maximising the use of the existing public transportation system to promote access to and within the Western Region by:

- Developing bus-based routes between Gateways connecting with Hubs and providing access to visitor attractions;

- Coordinating the timetables of regional and local bus services;
- The routes would be complemented by an 'all-in-one' ticket, based on the existing *Freedom of Northern Ireland* ticket, which would combine travel and entry to the visitor attractions – possibly in the form of an electronic *Smartcard*;
- In addition, a “Sustainable Travel Guide” to the Western Region would provide visitors with the necessary information to travel car free, including details on accommodation and the attraction themselves;
- Enhance provisions for cycling tourism by improving integration with existing bus services and providing bicycle hire at Hub stations;
- Developing individual visitor attraction *Tourism Travel Plans*;
- Providing coach parking facilities and parking discounts at attractions and within Hubs;
- Reintroducing the Gortin Rambler services, possibly as a private enterprise;

Conclusions & Recommendations

In conclusion the study has shown that there is great difficulty in providing access through existing public transport services in its current form. However, there is also much scope to improve the current situation by maximising the current provision of services and supplementing it with less conventional services, such as the rambler bus routes. Integrated ticketing and a sustainable travel guide will be essential complementary components of this proposal. The key recommendations for follow up are:

- The development of bus-based routes through the Western Region should be examined in more detail in liaison with Translink and the visitor attractions;
- Discussions should also take place between the visitor attractions and Translink to explore the potential to combine the cost of entry to attraction with the cost of travel in the *Freedom of Northern Ireland* ticket; and
- Visitor attractions should individually, or as a group (cluster), consider developing *Tourism Travel Plans* which focus on improving access by sustainable means on a more detailed and tailored level.

1 Introduction

1.1 Background

1.1.1 Colin Buchanan was commissioned by the Western Region Tourism Partnership of Northern Ireland, to undertake a *Visitor Management System and Sustainable Transport Services* study. The Western Region encompasses the counties of Tyrone, Fermanagh, and Londonderry.

1.1.2 This report details the research work undertaken in advance of the trials, including:

- A review of the tourism market in the Region
- A review of national and international best practice;
- An audit of existing transport provision in the Region; and
- Consultation with key stakeholders.

1.1.3 This stage of the study develops a strategy for improving accessibility and mobility within the Region through a range of initiatives and measures that seek to enhance existing transport provision and, where possible, introduce innovative ideas.

1.1.4 The overall study will be an important tool to encourage and enable a wider dispersal of visitors from the honey-pot destinations in Northern Ireland across the Western Region, maximising the length of stay and unlocking the potential for growth in tourism in the Region and the province as a whole.

1.1.5 The programme reflects the growing recognition of the importance of tourism to the Western Region and the contribution that tourism makes to its economic and social prosperity.

1.2 Definitions

Visitor Management System

1.2.2 A Visitor Management System in the context of this study is taken to be a strategy designed to maximise the dispersal of visitors throughout the region, maximise their length of stay and maximise their economic contribution. On this basis the study focused on maximising access through sustainable forms of transportation.

Sustainable Transport Services

1.2.3 Sustainable transport services have been taken in the context of environmentally sustainable alternatives to the car and include:

- Bus – conventional bus, demand responsive, community transport, school bus services, and tour coaches
- Rail – Northern Ireland Railways and Irish Rail
- Walking and Cycling.

Western Region

- 1.2.4 The Western Region Tourism Partnership is one of five regional Tourism Partnerships within Northern Ireland. It includes representatives from Fermanagh, Dungannon and South Tyrone, Cookstown, Omagh, Strabane, Magherafelt and Derry City Councils together with representatives from the Derry City Visitor Convention Bureau, Fermanagh Tourism, 'Flavour of Tyrone' and Sperrins Tourism.

Visitor ,Attractions in the Western Region

- 1.2.5 An important element of the study was the identification of visitor attractions in the Western Region. Unfortunately there is no real consensus on a definition of a visitor attraction. For the purposes of the study it was decided to review the website of the Northern Ireland Tourist Board (NITB). NITB was consulted with so as to ensure that the list provided was up-to-date. In some cases cafes were listed as attractions as they displayed some local art work. However, for the purposes of this study they were excluded as they represented retail offer rather than a visitor attraction.
- 1.2.6 A full list of visitor attractions, considered as part of the Visitor Management System has been included in Appendix A.

1.3 Aims and Objectives

- 1.3.1 The following paragraphs are extracts from the terms of reference and clearly state the overall aim of the study:

“The purpose of this assignment is to carry out independent industry, market and consumer research into the current visitor management system(s) in the region and the existing provision of transport. This study will then be used to develop the existing visitor management system(s) and create a number of trial transport services to enable the visitor management system in the western region.

The assignment will be an important tool to encourage and enable a wider dispersal of visitors from the honey-pot destination throughout the region and to maximise the length of stay within the WRTP area. This will allow the tourism industry to capitalise on the sectors potential as a sustainable, long-term economic generator in the region.

The programme reflects the growing recognition of the importance of tourism to the western region and the contribution that tourism makes to its economic and social prosperity.”

- 1.3.2 Table 1.1 presents the overall study aims and the approach taken to achieve these aims. Those highlighted in bold represent the aims which are addressed in this preliminary report.

Table 1.1: Study Aims and Objectives

Study Aims	Expected Approach
Establish focal gateways	Identify key gateways and visitor numbers
Audit of existing transport provision	Identify range of public transport provision
Best practice from other remote areas	Case studies
Identify 'hubs' from which local dispersal is arranged	Develop visitor management strategy focusing on access and dispersal
Build relationships with operators to develop and trial tourist routes	Identify attractions, providers and operators and establish trial routes
Market trial routes	Implement and market trial routes
Undertake surveys and data collection on trial routes	Provide information and follow up Management Information Systems on trial route(s)

1.3.3 The trial section of the study was not possible to complete as the operators who expressed an interest in participation required the off-season to prepare and plan new services before running them in the subsequent summer/peak season. Originally envisaged as an important component of the assignment, the piloting of 'trial routes' remains an aspiration.

1.4 Structure of the Report

1.4.1 Following this introductory section, the report is presented in 6 chapters, as follows:

- The Tourism Market in the Western Region
- National and International Best Practice
- Tourism Transport in the Western Region
- Stakeholder Consultation
- Preliminary Strategy
- Conclusions and Recommendations

2 The Tourism Market

2.1 Overview

2.1.1 This chapter reviews existing tourism performance within Ireland, Northern Ireland and as far as possible within the Western Region. It also highlights key priorities as identified by Tourism Ireland, the Northern Ireland Tourist Board and each of the partner organisations within the Western Region Tourism Partnership. This provides the context for all tourism development and marketing activity and has been used to inform the review of existing visitor management and sustainable transport services within the western region.

2.2 Overseas Visits to the Island of Ireland: Some Key Facts

2.2.1 Tourism Ireland is the body responsible for marketing the Island of Ireland as a visitor destination overseas. It also undertakes market research and provides information on global trends, the number of overseas visitors to the Island of Ireland, purpose of visit, how much they spent, how they spent it, where they stayed, where they visited and what they did. This information is summarised and presented within 'Facts and Figures: Island of Ireland Overseas Visitors 2007'. Tourism Ireland also produces a series of Market Profiles and Marketing Insight publications which are updated annually to inform marketing activity on both a thematic and a geographical basis.

2.2.2 Some of the key findings within the 2007 report are:

- There were 9 million visitors to the Island of Ireland (a 4% increase since 2006).
- Both Northern Ireland and the Republic of Ireland experienced similar growth for all main markets
- Overseas visitors were categorised as follows
 - Holidaymakers (52%).
 - Visiting Friends and Relatives (24%).
 - Business Tourism (15%).
 - Other (9%)
- Overseas visitors generated 4 million euro (a 3% increase since 2006).
- Overseas visitors came from the following areas:
 - Great Britain 54%
 - Mainland Europe 30%
 - North America 12%
 - Other Areas 4%
- In terms of revenue generated the overseas visitor market can be broken down as follows:
 - Great Britain 39%
 - Mainland Europe 34%
 - North America 20%
 - Other Areas 8%

-
- 2.2.3 Different geographical markets have different visitor profiles. Tourism Ireland has produced a series of Market Profiles which highlight the key characteristics of each overseas market.
- 2.2.4 Overseas visitors from Great Britain:
- Arrive all year round
 - 77% of all GB visitors use air transport
 - Stay for on average 5.6 nights
 - 50% of all GB visitors are repeat business
 - 48% of all GB visitors use a car to tour the island
 - 47% of all GB visitors plan and book their visit themselves.
 - Visiting Friends and Relatives is an important sector
 - Short breaks to Dublin, Belfast and the rest of Northern Ireland is important
- 2.2.5 The North American market has a different visitor profile. North American visitors;
- Arrive mainly during the summer months (June, July, August)
 - 94% of all North American visitors arrive by air
 - 41% of these hire a car to tour the island
 - 71% are visiting Ireland for the first time
 - 75% of North American visitors book their holiday independently
 - History and culture are an important part of the attraction (87% visit this type of attraction during their stay)
- 2.2.6 Each of the European markets has a different visitor profile. For example, in relation to France;
- 40% of all French visitors arrive during July and August
 - 78% of all French visitors come by air
 - 33% of all French visitors come from the Paris region
 - 67% of all French visitors were visiting Ireland for the first time
 - 79% of all French visitors travel independently
- 2.2.7 Each overseas market (for example Germany, Italy, Canada, Spain or Scandinavia) has a distinct visitor profile. Individual marketing campaigns are developed to reflect each visitor profile.
- 2.2.8 Tourism Ireland's publications summarise key facts in relation to the overseas market. The **domestic market** is also vitally important for the tourism industry in Ireland. Domestic marketing is the responsibility of Fáilte Ireland, each of the Regional Tourism Partnerships and to an extent each of the local authorities.
- 2.3 Tourism in Northern Ireland: Some Key Facts
- 2.3.1 Visitor performance is monitored and evaluated by the Northern Ireland Tourist Board. This information is updated every year and presented as a publication entitled 'Tourism Facts'. Visitor information is derived from a number of different sources including the ;
- Northern Ireland Tourist Board's Passenger Survey
 - Northern Ireland Tourist Board's Visitor Attraction Survey
 - United Kingdom Occupancy Surveys
 - Fáilte Ireland's Survey of Overseas Travellers
 - CSO's Country of Residence Survey
-

- CSO's Household Travel Survey
 - United Kingdom Tourism Survey
- 2.3.2 Tourism performance is measured and evaluated using an internationally accepted definition of the visitor and the tourist as follows;

The Visitor

- 2.3.3 Any person visiting – for any reason other than following an occupation remunerated from within the country – any country other than that in which he/she has his/her usual place of residence.

The Tourist

- 2.3.4 Tourists can be sub-divided into three groups:
1. Those engaged in leisure pursuits
 2. Business people
 3. Those visiting friends and relatives
- 2.3.5 Domestic tourism or 'Home tourists' are people who take their holiday away from home in their own country. This is a very important sector within both Northern Ireland and the Republic of Ireland.

- 2.3.6 Some key facts in relation to tourism performance in Northern Ireland have been summarised as follows:
- There were 2.11 million visitors to Northern Ireland.
 - This generated 10.49 overnight stays and £376 m spend.
 - 61% of all visitors came from Great Britain, 15% came from the Republic of Ireland, 13% came from the rest of Europe 8% from North America, 3% from Australia and New Zealand and 1% from elsewhere.
 - Of the 2.11 million visitors to Northern Ireland, 45% were visiting friends and relatives, 23 % were holiday/recreation/leisure, 23% were business visitors and 6% other
 - 51% of all visitors arrived by air, 25% arrived by sea whilst a further 24% arrived via the Republic of Ireland. There was considerable variation between each of the main markets.
 - Three of Northern Ireland's top ten visitor attractions (in terms of visitor numbers) were located in the Western Region. These were the Historic Walls of Derry (213,000), Belleek Pottery (172,000),and the Ulster American Folk Park (157,000)
 - The survey also lists visitor numbers for the top ten forest/country parks and gardens in Northern Ireland. None of those listed are within the Western Region.

2.4 Western Region Tourism Partnership

- 2.4.1 The Western Region Tourism Partnership is one of five Regional Tourism Partnerships within Northern Ireland. It includes representatives from Fermanagh, Dungannon and South Tyrone, Cookstown, Omagh, Strabane, Magherafelt and Derry City Councils together with representatives from the Derry City Visitor Convention Bureau, Fermanagh Tourism, 'Flavour of Tyrone' and Sperrins Tourism.

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- 2.4.2 Previous market research commissioned by Fermanagh Tourism, Derry City Visitor and Convention Bureau and Sperrins Tourism Ltd identified those visiting friends or relatives in Northern Ireland from Great Britain, North America Australia or elsewhere as a 'saturated market'. This recognises VFR as a very important market but not as a priority for marketing.
- 2.4.3 The following 'market segments' were identified by Fermanagh Tourism Derry City Visitor and Convention Bureau and Sperrins Tourism as priorities:
- Domestic
 - Families
 - Couples
 - Empty nesters
 - Republic of Ireland
 - Families
 - Couples
 - Empty nesters
 - Business
 - Great Britain
 - Scotland Sightseers and 'Culturalists'
 - England Sightseers and 'Culturalists'
 - Business
 - USA and France
 - Sightseers and 'Culturalists'
 - Business
 - Netherlands
 - Sightseers and 'Culturalists'
 - Canada and Australia,
 - Sightseers and 'Culturalists'
- 2.4.4 In 2007 Fermanagh Tourism and the Derry City Visitor and Convention Bureau hosted a series of workshops in association with the Northern Ireland Tourist Board. Participants were asked to identify where the majority of their visitors came from and invited to comment on the success or otherwise of recent marketing initiatives.
- 2.4.5 In Fermanagh it was felt that:
- The majority of visitors came from the region.
 - The majority of the European visitors came from Germany and France
 - 'Learning English As A Foreign Language' Courses were perceived to be an important attraction for the French market
 - Eastern Europe was perceived as a growing market.
 - There were few visitors from the Republic of Ireland.
 - There were more Canadian but less American visitors.
 - New Zealand and Australia were also viewed as important markets.
- 2.4.6 Derry City Visitor and Convention Bureau felt that;
- The main market was the domestic market of Northern Ireland
-

- There had been a decline in the number of visitors from the Republic of Ireland
- There had been an increase in the number of visitors from Great Britain
- Visitor numbers from North America were felt to have increased.
- Repeat visits were viewed as important
- Golf tourism has potential

2.4.7 With regard to the Sperrins area, and following the outcome of the market research undertaken as part of the continual assessment of the impact of the Natural Resource Rural Tourism Initiative, key outcomes include

- The main market is the domestic market of Northern Ireland
- Most visitors come from Northern Ireland (40%) followed by England (20%) with improvement noted in the percentage of visitors coming from the USA, Australia/New Zealand and the Republic of Ireland
- Overnight visitors stay on average 3 nights and 4.07 days in the Sperrins
- Average visitor expenditure amounts to £422.29 per trip (£103.80 per day)
- The most popular reasons for visiting the region continue to be short-breaks, holidays or business

2.5 Identifying a Visitor Profile for the Western Region

2.5.1 Whilst difficult to identify an overall visitor profile for the Western region it is possible to make some general observations. These are listed below:

- The overwhelming importance of the domestic market
- Within the overseas market, Visiting Friends and Relatives has been identified as a particularly important sector.
- Great Britain is by far the most important overseas market (61%)
- 58% of visitors from Great Britain arrive by air, 32% by sea. The remaining 10% arrive via the Republic of Ireland.
- 57.5% visitors from all other overseas destinations arrive via the Republic of Ireland.
- Family groups, couples and empty nesters are all important sectors within both the domestic and the ROI markets.
- Sightseeing and cultural tourism is particularly important within the overseas market

2.6 Selecting the Visitor Attractions

2.6.1 Visitor Attractions within the Western Region Tourism Partnership area were identified from the NITB Survey of Visitor Attractions Annual Report 2006 and a number of other relevant sources. These included the Discover Northern Ireland website, the Western Region Tourism Partnership, Derry City Visitor Convention Bureau, Flavour of Tyrone Fermanagh Tourism, Magherafelt District Council, Sperrins Tourism and each of the local authorities.

2.6.2 The full list of visitor attractions considered as part of the Visitor Management System has been included within Appendix A, and illustrated at Figure 2.1.

Figure 2.1: Map of the Western Region and Visitor Attractions



2.7 Identification of Gateways and Hubs

2.7.1 Identifying *Gateways* (entry points to the country) and *Hubs* (from which visitors will disperse into the Western Region), were key objectives of the study.

Gateways

2.7.2 In order to look at access to and within the Western Region the key gateways (point of access to the country) and key hubs (point of access to the Western Region) have been identified. as shown in Figure 2.1.

2.7.3 There are 3 principal Gateways to the Western Region, as follows:

- **Belfast City** – Belfast International Airport, George Best City Airport, Port of Belfast, Port of Larne
- **Derry City** – City of Derry Airport;
- **Dublin City** – Dublin Airport, Dublin Port, Dun Laoghaire Harbour

2.7.4 The Gateways represent the entry point to the Visitor Management System for international tourists/visitors.

2.7.5 For the purposes of this strategy connections between the various sea and air ports and the cities of Belfast, Derry and Dublin are considered well established. For example, Dun Laoghaire Harbour is located adjacent to the DART rail line in Dublin which connects with the centre of Dublin and intercity train services to Belfast. The privately operated Airporter bus service connects Derry City with Belfast City Airport and Belfast International Airport.

Hubs

2.7.6 The selection of Hubs was based on criteria which required that a designated Hub would be the point from which local public transport services would operate; where visitor accommodation would be more plentiful and where visitors could spend time i.e. as a destination in itself or for extended periods between connecting services.

2.7.7 There are well established bus and rail services operating between the Gateways of Derry, Belfast and Dublin and the main regional towns of Northern Ireland. As such, these routes have the highest frequency of services both during the week and at the weekend. In addition, many of the attractions within the Western Region are located within the catchment of these towns. Therefore they represent the most suitable Hubs for the Visitor Management System in the Western Region.

2.7.8 The designated Hubs are as follows:

- Omagh
- Ballygawley¹
- Strabane

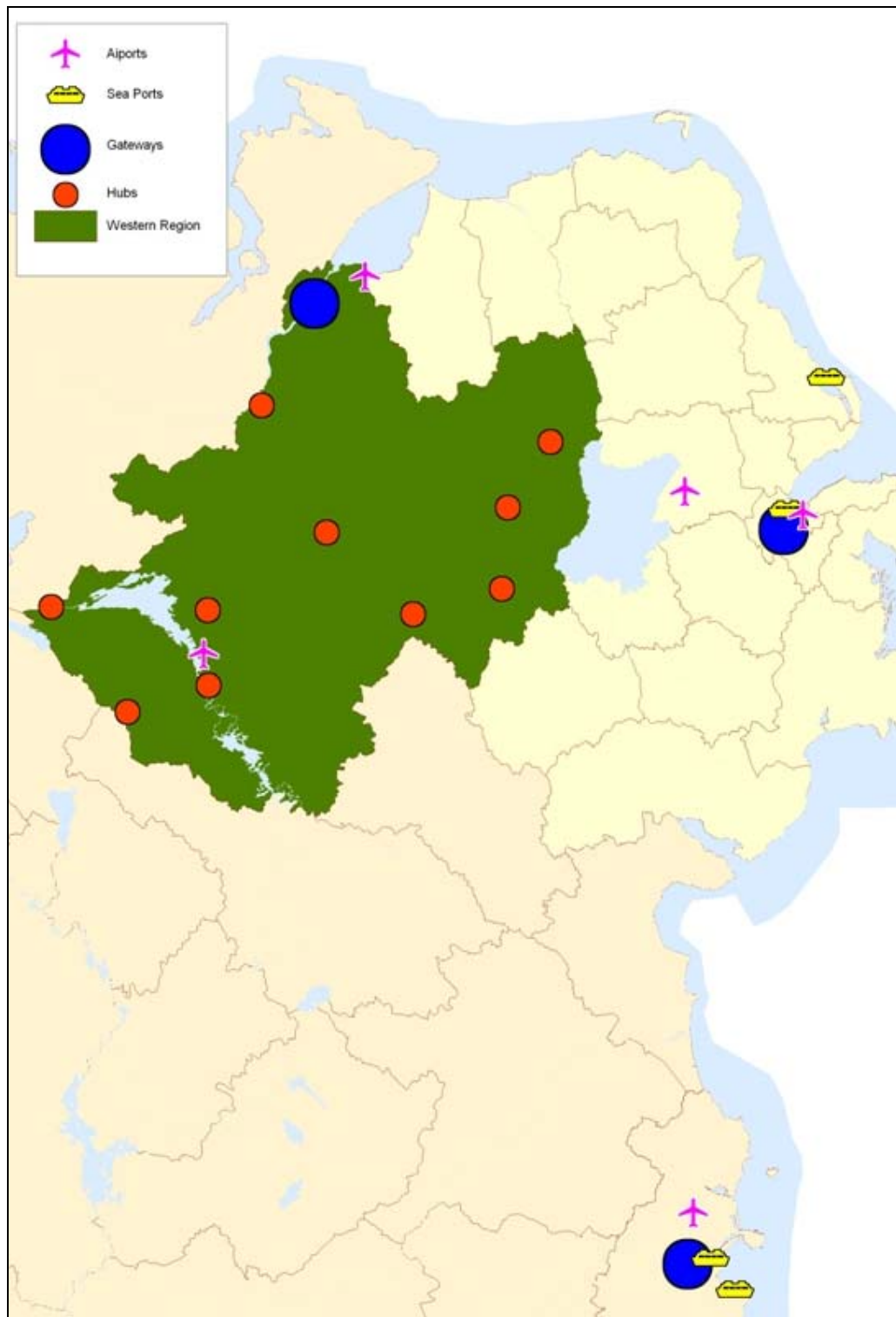
¹ Ballygawley has been included in the list of Hubs because it is a strategic interchange for inter-urban bus services both within Northern Ireland and with the Republic of Ireland. This is because it is located on the northwest passage of Northern Ireland and the route from Dublin to the northwest of the island into Donegal.

- Dungannon
- Cookstown
- Magherafelt
- Enniskillen
- Belleek
- Belcoo
- Irvinestown
- Derry City²

2.7.9 The key locations of Gateways (point of access to the country) and key Hubs (point of access to the Western Region) have been identified and are shown in Figure 2.2.

² Derry City is both a Gateway and a Hub, as it is located within the Western Region.

Figure 2.2: Location of Gateways and Hubs



3 Best Practice Review

3.1 Overview

3.1.1 The review of national and international best practice was undertaken by examining a range of sources including known reports and studies (a bibliography is presented in Appendix B) and by searching the internet (tourism agency websites) and consulting with various agencies throughout the UK.

3.1.2 The review was undertaken geographically looking at Northern Ireland, Great Britain (covering Scotland, England and Wales), the Republic of Ireland, and Internationally (covering the rest of Europe and other continents). However, the review focused primarily on the UK and Ireland in order to identify measures which would improve access to attractions in the context of the Western Region, by sustainable transport modes.

3.1.3 The aim of this review was to identify measures/transport services that could be used to 'fill the gap' in provision of sustainable transport modes for access to visitor attractions in the Western Region. This may be done by replication, tailoring the service, or generating ideas for new or innovative solutions for the Western Region.

3.2 Northern Ireland

3.2.1 Beginning with a national perspective, a number of tourism or less conventional public transport services offer the visitor/tourist a more flexible alternative to travel, particularly with their focus on rural areas.

Rambler Services

3.2.2 Although some concerns were highlighted in the consultation exercise about the integration of Rambler services with inter-urban bus routes, the service operated by Translink provides an example of how dispersed rural visitor attractions can be served by sustainable transport.

3.2.3 The Rambler services were designed in conjunction with the Department for Regional Development, to promote tourism in rural areas. The services are part of the 'Access by Bus to the Countryside' or ABC, which is supported by the Rural Transport Fund.

3.2.4 There is some evidence to show that the schemes have proved successful, with Translink reporting patronage increases in the Causeway Rambler of 71% between 2001 and 2002³. It was noted that *"in addition to being used by hikers and other outdoor enthusiasts, it proved to be particularly popular with Senior Citizens..."*. The DRD noted that such services *"improve accessibility to areas of outstanding natural beauty and are of benefit to both rural dwellers and to visitors who do not have access to cars. They make an important contribution to reducing the rural isolation experienced by many local residents but also*

³ www.translink.co.uk

enable more people to enjoy some of the most varied and interesting scenery in the country and by doing so assist the local tourist industry. Tourism is an important growth industry in Northern Ireland and key to its development is a public transport system capable of meeting the unique needs – in terms of seasonality, destination and cost – of the tourist population”.

3.2.5 An analysis of the performance of the Rambler services is shown in Table 3.1.

Table 3.1: Translink Rambler Services – Passengers per hour analysis⁴

Service/Financial Year	03/04	04/05	05/06	06/07	07/08
Antrim Coaster (Subsidised Periods)	5.63 (C) 3.42 (L)	5.29 (C) 4.32 (L)	4.78 (C) 7.00 (L)	4.30 (C) 4.32 (L)	4.88 (C) 4.27 (L)
Causeway Rambler	6.18	6.34	5.75	6.35	6.59
Gortin Rambler	1.03	0.99	w/d	w/d	w/d
Kilkeel Rambler	n/a	4.68	6.83	8.12	6.80
Lecale Rambler	1.49	1.49	1.52	1.42	w/d
Mourne Rambler	2.94	3.81	4.29	3.96	3.88
South Down Rambler	1.94	1.63	2.22	2.44	2.98
Sperrin Rambler	1.75 (M) 3.66 (O)	2.93 (M) 4.51 (O)	3.09 (M) 4.99 (O)	2.62 (M) 5.13 (O)	3.07 (M) 5.79 (O)

- (C) – Coleraine Depot (L) – Larne Depot
- (M) – Magherafelt Depot (O) – Omagh Depot
- (w/d – Service withdrawn)
- NB – Services with a passenger per hour rating of less than two result in subsidy being withdrawn, which was the case with the Gortin and Lecale Ramblers.

3.2.6 As shown in Table 3.1 the demand for the Sperrin Rambler departing from Omagh has been increasing on a yearly basis and as of 07/08 the Sperrin Rambler had the second highest overall demand. In contrast, the Gortin Rambler, the only other Rambler services in the Western Region, was withdrawn due to low demand.

3.2.7 The Gortin Rambler served a route that had potential to serve several attractions and both the Sperrin and Gortin Rambler routes are displayed in Figure 3.1.

3.2.8 The Gortin Rambler visits the following attractions:

- Gortin Glen
- Stewart Castle
- Harry Avery's Castle
- Ulster American Folk Park

3.2.9 The Sperrin Rambler visits the following:

- Sperrin Heritage Centre (as a drop off/collection only point)

⁴ Provided by Translink

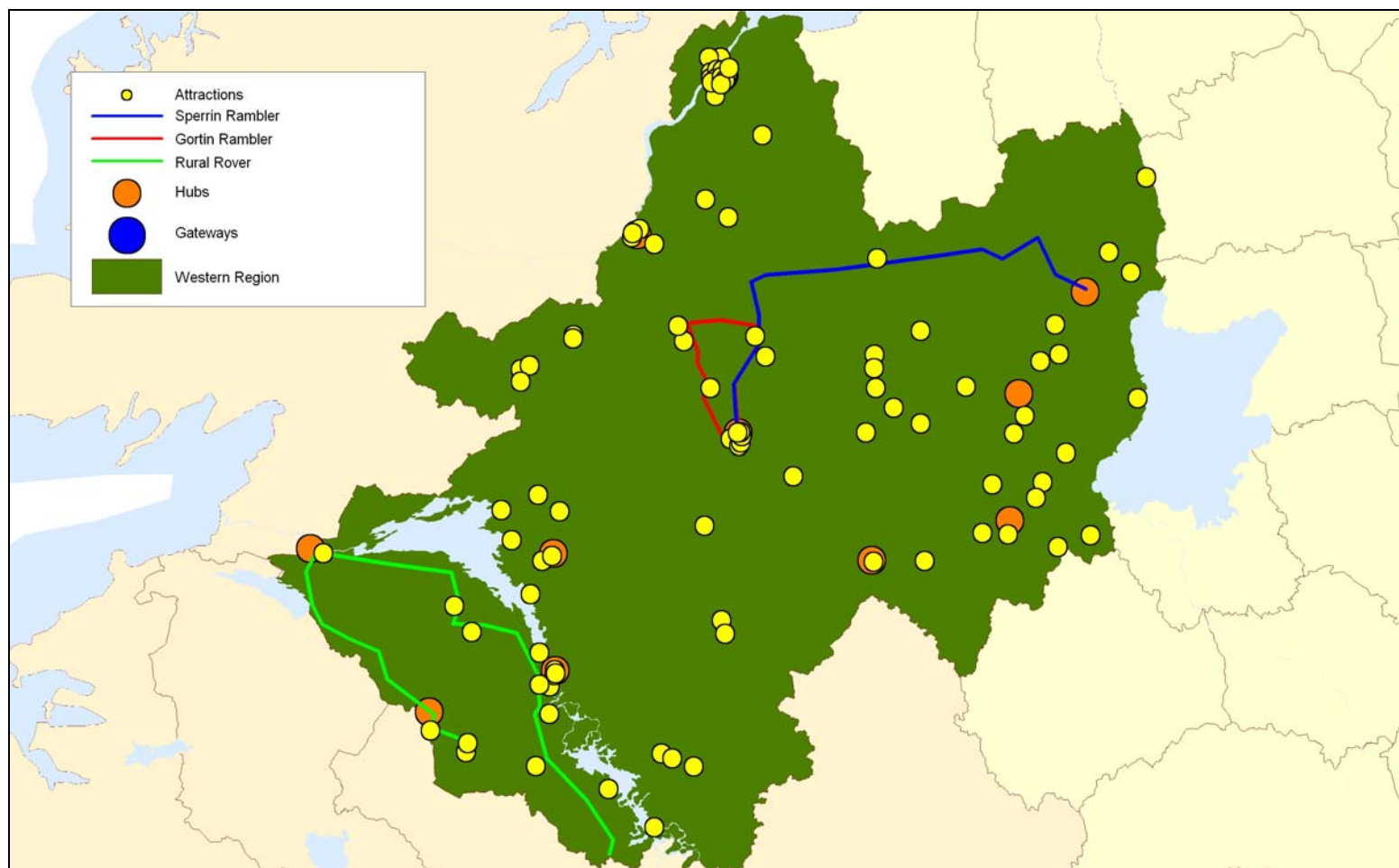


Figure 3.1: Rambler Services in the Western Region

3.2.10 **Translink Rural Rover Services** Translink's Rural Rover service currently operates in South Down and Fermanagh, providing a twice daily connection for shoppers and day trippers and those with reduced mobility living along the route. The service has doubled its number of passengers since its launch in 2002. Passengers can telephone request the bus to travel off the main route to pick them up in their local villages. Both services link into main bus stations to provide wide ongoing access for rural residents. The services however are operated differently as the service in Newcastle operates as a 'flexible transport linear service' while the Fermanagh-based service is a 'DRT area service' and a unique joint operation between the community transport sector and Translink. The project uses Translink's well-established operational and marketing skills bolstered by best practice from elsewhere in the UK in respect of flexibly routed and DRT services. Rural Lift, a community transport operator, provides the daily scheduling and control for the DRT service. The service was shortlisted for the UK Bus Awards in 2007 and its route is displayed in Figure 3.1.

3.3 Rest of the UK

Scotland

3.3.2 A number of the consultees identified Scotland as country with examples of best practice in visitor management systems, with a focus on accessibility through sustainable modes. Scotland offers a particular good comparison with Northern Ireland in that it is sparsely populated with many visitor attraction located in relatively rural locations. On this basis the review of best practice focused on initiatives which are operating or serving regions which are similar in nature to the Western Region in Northern Ireland. The review revealed significant activity and progress in the regions of:

- Western Isles
- The Highlands
- Stirling
- Fife
- Strathclyde, and
- The Borders

3.3.3 In general attractions are owned and operated by public bodies. However, as in most cases throughout the UK, Ireland and internationally, historical properties tend to be run by the private sector.

3.3.4 Clearly there is a strong mix of services in use in Scotland as a whole, and within the different regions examined. However, 'Transport Services', which refers to the development of new or existing bus/rail services, is the predominant measure in Scotland, followed by ticketing (generally integrated ticking).

3.3.5 The following sections look at two particular case studies.

3.3.6 **Western Isles - Day Trips from Inverness:** In 2000, the local council set up a trial scheme running 19 day trips to visitor attractions throughout the Highlands. The day trips included the use of rail, ferry and bus, specifically aiming to provide an alternative to car travel. The

initiative involved the provision of a single ticket for the journey, which included discounts for entry to the visitor attractions. However not all routes included the discount element. These routes tended to attract less visitors and 2 were eventually dropped. However, 8 day trips managed to attract over 1000 visitors during the 10 weeks trial period⁵.

- 3.3.7 The key lesson from this case study is the provision of a single ticket for travel and access to the visitor attractions. This product/service clearly makes access within the region easier and simpler for visitors and thus more attractive to visitors.
- 3.3.8 **Western Isles – Integrated Bus Services:** The Western Isles is a predominantly rural area located on the west coast of Scotland. The region is home to a variety of visitor attractions including a 150 mile-long island chain of beaches, wildlife, culture and adventure, and is popular for outdoor activities.
- 3.3.9 Originally a public transport initiative for residents, the integration of services by the Western Isles is one product that has aided tourism in the region. The initiative involved the integration of local bus services, including integrated ticketing for travel between bus and ferry, and travel on the islands.
- 3.3.10 The Western Isles have monitored the impact of the initiative which indicates significant success. Over 180,000 visitors come to the region each year, with direct expenditure of over £41m. Tourism in the region is now worth 15.6% of the GDP.
- 3.3.11 The integration of local bus services has created a bus network which connects with ferry services to greatly enhance access within the region for visitors and residents alike. Improvements in accessibility have enhanced the overall tourism offer for the Region. Importantly, this initiative had not involved significant expense but rather more efficient and effective management of existing resources.
- 3.3.12 In the consultation exercise it was noted that the failure to integrate the timetables for conventional bus services and the tourism-led Sperrin Rambler bus service, created a negative experience for visitors, reducing accessibility and the attractiveness of the Western Region as a result.

Wales

- 3.3.13 Similar to Scotland, Wales had been identified by consultees as a country of best practice in visitor management systems in a rural context. On this basis the review of Wales also focused on rural areas with dispersed populations. The areas reviewed included:
- The Snowdonia Region
 - South East Wales
 - Cwmbran
 - Carmarthen

⁵ Transport For Leisure Ltd. (2000) Transport Tourism and the Environment in Scotland. Scottish Natural Heritage Commissioned Report F00NC17

- Gwynedd
 - South Wales
- 3.3.14 The review covered a total of 44 visitor attractions of various type, and 10 different products/services, all of which focused on Marketing. All of the initiatives were operated jointly between public transport operators and tourism agencies. The marketing initiatives/campaigns generally promoted existing bus and rail services.
- 3.3.15 Most of the products/services included the production and distribution of leaflets and brochures which included timetables and maps of bus and rail services. The following sections summarise case studies of particular examples of best practice.
- 3.3.16 **Freedom of Wales Flexi Pass:** As the title suggests this product can be used nationwide. It enables visitors to travel on all public transport services throughout Wales and includes discount on access to many visitor attractions.
- 3.3.17 The Sustainable Transport for Tourism for Wales report (2003) estimates the economic impact using a STEAM⁶ model. It is estimated that the flexi pass brought an extra 7,827 visitors to Wales with an additional economic impact of £309,590 in its first year.
- 3.3.18 Results from travel diaries sent out with the Flexi Pass show that of those who returned the survey 42% of visitors would not have visited Wales in absence of the Flexi Pass and 44% of people who did visit would not have used public transport in absence of this scheme. These results again represent the opening year and while this report has not been updated or repeated anecdotal evidence suggests that the Flexi Pass remains successful. The scheme now has its own website (www.walesflexipass.co.uk) with online bookings, lists of attractions and general information on the area including places to stay and travel planning guides. The website also provides visitors with an online 'journey planner' which enables them to plan their journeys and set their own itinerary, with the flexibility of the flexi pass to alter and change as they go along. This fosters a sense of confidence among visitors by removing uncertainty.
- 3.3.19 **Promotional Material in the Snowdonia Region:** Tourism agency – Attractions of Snowdonia, ran a promotional campaign distributing 350,000 leaflets containing details on access to 15 visitor attractions using public transport. The results indicated that 44% of visitors would not have used public transport in the absence of the leaflets of which 40% would have used a car.

⁶ Scarborough Tourism Economic Activity Model - The model not only looks at the level of spending by visitors to the region but also numbers of visitors, the breakdown between overnight and day visitors and also the number of people employed in the tourism industry.



Figure 3.2: Snowdonia Region and Attractions

3.3.20 This initiative proves the importance of ensuring that visitors are well informed about their travel choices/options. However, it is worth noting the results achieved may well have benefited from the impact of the *Freedom of Wales Flexi Pass*. Nonetheless, the impact of public transport focused tourism information can clearly have a positive impact on the attraction of visitors to a country and/or Region. Indeed combining such ticketing and information may result in significantly better results.

England

3.3.21 The review of best practice in England focused on areas of a rural nature, with examples found in Yorkshire in the north and Cornwall in the southwest. A total of 19 visitor attractions and 5 separate initiatives were examined. These products/services are operated by a mix of public bodies and private transport operators.

3.3.22 The products/services comprise a mix of marketing and fiscal initiatives. Marketing initiatives comprised the distribution of brochures and leaflets which promote public transport connections for various visitor attractions in the region. The fiscal-type products involve discounted ticketing initiatives which combine travel on public transport services and access to visitor attractions.

3.3.23 The following case study was identified as an example of best practice which could be applied in the Western Region of Northern Ireland.

3.3.24 **Days Out In West Cornwall:** In 2005 Penwith District Council produced a guide to the Penwith area promoting both the area and sustainable means of transport therein. Aimed originally at walkers to show that all

routes and destinations within the Region could be reached with public transport and that a number of attractions offered discounts to visitors who presented their public transport ticket.

- 3.3.25 The success of this product has meant that the fold out map has been replaced with a 42-page booklet detailing all public transport routes, walking and cycling routes, as well as attractions within the area.
- 3.3.26 In the first year of operation 100,000 copies of the guide were produced and distributed, rising to 150,000 in the second year, and 375,000 in the third year.
- 3.3.27 There are now plans to merge the guide with 'West Cornwall Produce' which details local produce, where it is grown and where the main markets within the local area for the produce are. This combined guide will market the regions attractions, public transport services and eateries that serve locally produced goods. It is believed that this will lead to greater success of the guide and the advertising will ensure a sustainable product benefitting the region.
- 3.3.28 **The Dales Bike Bus** The Yorkshire Dales National Park Authority introduced a bus-based service which integrated travel by bicycle and bus, to facilitate more cycling in the National Park. Services operate on Sundays and are also open to all users tourist and local people alike.
- 3.3.29 A special trailer (See Figure 3.3) is fitted to the bus to carry the bicycles, at a charge of £1.00.



Figure 3.3: Dales Bike Bus

- 3.3.30 Andy Ryland, Transport and Visitor Management Officer for the Yorkshire Dales National Park Authority, said: "The Dales bike bus is a great way for people to get out into beautiful countryside leaving their cars behind and using public transport. " From statistics and feedback last year, we found that people like taking the bus out to different parts of the dales and then either cycling all the way home or some of the way before catching it to complete their journey. The Bus seems especially popular with people who have made cycling part of their lives - people who perhaps commute to work or who have bought a bike and sold their car."

-
- 3.4 Republic of Ireland
- 3.4.1 The Republic of Ireland represents an important contributor for tourism in Northern Ireland and vice versa. Both international and domestic visitors/tourists often include travel to both states regardless of which country they enter first. There are also many similarities between both countries in terms of the geographical landscape and low density populations. In this respect we sought to identify a region or cluster of attractions which faced similar issues to those of the Western Region.
- 3.4.2 **Cliffs of Moher – Discount Scheme for Coaches:** The Cliffs of Moher which are considered a ‘honey pot’ destination, have been earmarked as one of Ireland’s and Europe’s most visited tourist locations with visitor numbers to the area exceeding 900,000 in 2006 and 950,000 in 2007. However, other attractions in the Region have suffered rather than prospered as a result of their proximity to this ‘honey pot’ destination.
- 3.4.3 To address this issue and encourage more visitors to the other attractions in the Region, the Cliffs of Moher New Visitor Experience in conjunction with Clare County Council, implemented a scheme targeted at private tour and coach operators who operate in and through county Clare. It is a pilot scheme to enable a 60-80% reduction in the facilities charge at the Cliffs of Moher in order to achieve a regional goal. The new discount incentive scheme is designed to reduce costs for operators who visit the Cliffs of Moher New Visitor Experience and other named partner attractions in the north of the county.
- 3.4.4 Operators are offered a discount at the cliffs of Moher New Visitor Experience for up to four separate partner attractions visited in north Co. Clare provided that the attractions are visited the same day or one day either side of visiting the Cliffs of Moher centre.
- 3.4.5 The attractions being promoted are the less visited attractions in north county Clare, through the popular Cliffs of Moher New Visitor Experience. They include Aillwee Cave near Ballyvaughan, The Burren Centre in Kilfenora, Burren Smokehouse in Lisdoonvarna, Cliffs of Moher Cruises in Doolin, and Dysert O’Dea Castle near Corofin.
- 3.4.6 The partner attractions provide stamped discount vouchers which can be redeemed at the Cliffs of Moher Visitor Centre.
- 3.4.7 This scheme is 18 months old and from its inception the focus was to increase the average dwell time in the region which has been measured at 40 minutes. This has been achieved and is expected to further increase over the life of the project which was proposed to last up to five years. The results from the individual attractions have been mixed and dependant on their level of participation as well as the facilities on offer i.e. some attractions within the Region do not have the capacity to deal with large groups and coaches.
- 3.4.8 Attractions that marketed the scheme have seen an increase in coach numbers and a new visitor base emerging. The 2008 season has shown a downturn in Clare tourism in accordance with current economic trends. Even in light of this there has been a noticeable effect within the Region from this programme.
-

3.5 International

- 3.5.1 The scope of the best practice review was also widened to take in examples of international best practice. As with the reviews in the UK and Republic of Ireland, the focus was on regions within countries which are rural and similar to the Western Region in Northern Ireland.
- 3.5.2 Examples of applicable best practice were found mainly in Australia. Although the regions reviewed were significantly larger than the Western Region in Northern Ireland, they had similar characteristics including sparse populations and a tendency for visitors to move between larger or more significant attractions missing out on the full experience or tourism offer of that Region.
- 3.5.3 **TouristCard experience in Bremen, Germany** This is an all-inclusive TouristCard that combines public transport access with access to leisure and tourist attractions across the region of Northwest Germany. An area that spans from Germany's north Sea coast (including the islands of Helgoland and Borkum) to the Teutoburg forest and from the Emsland to Stade. The role of soft, environmental tourism will be enhanced using this 'north-West Entdecker Card'. The technology is based on an intelligent smart card, which will become the standard for public transport ticketing applications.
- 3.5.4 Results from a survey undertaken in 2004 showed that the initiative was having a significant impact with more than 10000 customers using the DiscoveryCard in which showed an improvement from 2003 when figures illustrated 7000 customers using the card. As a result of this success the offer was extended with a large range of additional new attractions for the summer of 2005.
- 3.5.5 Results from a recent survey showed that customers expectations of the service were exceeded by 33%. The survey revealed that 56% of all users were satisfied, 5% were not satisfied and 6% provided no answer. One of the results, which will have a great importance on stakeholders, was if the DiscoveryCard makes the region more attractive. 72% answered *Absolutely* with only 5% were *not convinced*.
- 3.5.6 One of the results from the survey showed the importance of the DiscoveryCard in relation to Mobility was the fact that 86% off all customers agreeing that the free public transport was very important, with only 2% believing it not to be and a further 9% still preferring to travel by car.
- 3.5.7 **Acadia National Park Transit, USA** Mount Desert Island, Maine, is home to Acadia National Park, a 40,000-acre preserve of forests, mountains, lakes, and coastline. It receives nearly three million visitors annually. More than 90% of visitors arrive between May and September.
- 3.5.8 A seasonal shuttle bus service was introduced in 1999, serving both Acadia and the Mount Desert Island community. Called the Island Explorer, the service is a public-private partnership involving federal, state, and local agencies, as well as non-profit private partners. Its purpose is to permit continued growth in tourism without continued growth in traffic congestion and vehicle emissions. At the same time, it

enhances the visitor experience by providing a convenient and less stressful alternative to driving. On board the Island Explorer, visitors can meet and socialize, or watch the scenery without worrying about missing the turnoff to the campground. Additionally, hikers can trek across the park's many one-way trails without having to loop back around to their cars.

3.5.9 Propane-powered buses serve seven island routes (See Figure 3.4) during the months of June, July, and August. These routes link destinations inside the park to hotels, inns, campgrounds, shops, and restaurants in all four island towns. The routes also serve the Hancock County Airport in Trenton, the Bass Harbour state ferry terminal, and the Bar Harbour international ferry terminal, which provides high-speed catamaran service to Nova Scotia. The Island Explorer is operated by Downeast Transportation, Inc., a non-profit transit company that contracts with the Maine DOT. Since 1994, Downeast has successfully operated a bus route serving campgrounds along State Route 3 on Mount Desert Island, including Blackwoods Campground in Acadia. In fact, the campground shuttle bus service provided the model for the expanded island-wide system.

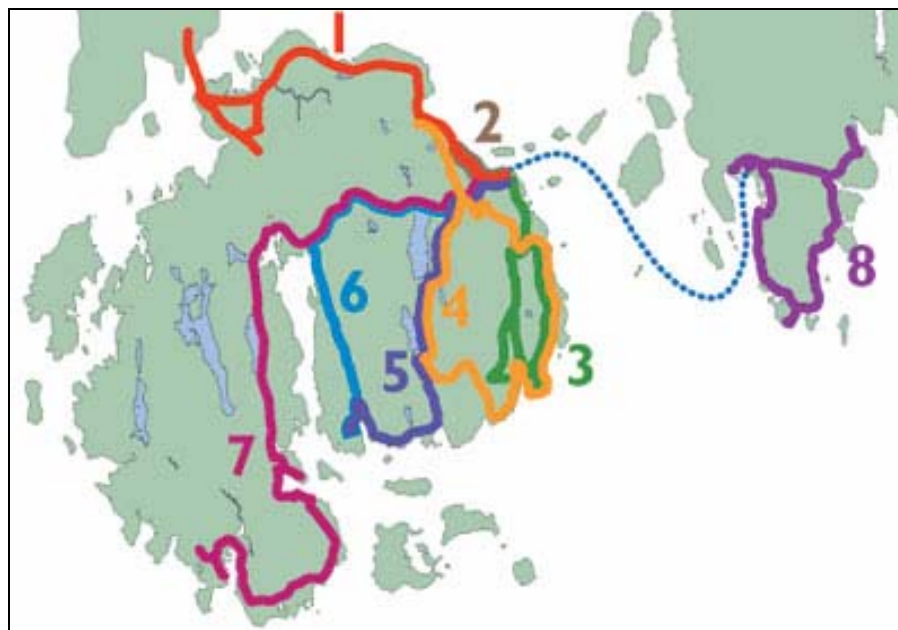


Figure 3.4: Acadia Park Bus Routes – Journey Planner

3.5.10 Visitors are encouraged to use the Island Explorer because:

- Vehicles are clean, modern, and efficient. Twenty-eight passenger, fully accessible transit buses were purchased specifically for the service. Each bus is equipped with two bus racks with a capacity to transport four bicycles. The buses burn propane fuel, producing fewer emissions and less noise than diesel buses.
- The service provides a direct connection with most motels and campgrounds on Mount Desert Island at 30- or 60-minute intervals. Ideally, service would be more frequent on certain routes

and at certain times, but the number of available buses proves the limiting factor.

- The service is “farebox free” for both passengers and their bicycles. That is, no fare is collected on board. An Acadia National Park visitor survey found that 48% of visitors surveyed would use a free shuttle bus service, but only 25% would use a bus if a fee were collected at boarding. Acadia’s experience operating a more modest campground shuttle service prior to the Island Explorer bears out these statistics. In 1996 roughly 2,000 campers rode the shuttle, paying a two dollar fare to do so. The following year, when the fare had been eliminated, ridership reached 12,000. Ridership rose again to 15,000 in 1998, the second year after the change.
- The service is promoted extensively. A marketing plan, including visitor guides, maps, timetables, posters, public service announcements, and television and radio messages were all developed. In 1999, more than 50,000 copies of the visitor guide were printed and inserted into the park’s newspaper, the *Beaver Log*, and 70,000 visitor guides were produced as stand-alone items. Advertising campaigns rely on positive reinforcement, rather than stern language. “We advertise by showing people that if they use the service they can have a better experience”.
- The Island Explorer is strongly supported by the Maine Office of Tourism and the Maine Department of Tourism.

3.5.11 The shuttle benefits visitors to Acadia because it allows more people to experience the national park each summer than could otherwise if the private cars were the only form of island transportation. The shuttle benefits local residents and businesses because it increases tourism revenues without increasing the strain on the island’s overburdened transportation infrastructure.

3.5.12 **Greater Sedona Transportation, USA** The Sedona/Red Rock region in northern Arizona is a popular destination for tourists who are attracted by its spectacular Red Rock cliffs, expanses of forest and grasslands, rushing rivers and striking canyons. The area has approximately 14,000 residents and 4-5 million annual visitors driving 2.5 million cars through Oak Creek Canyon each year, with a doubling of visitors projected in the next two decades. Currently, the only viable way for most people to get to or around Sedona is by car.

3.5.13 The City of Sedona, Yavapai and Coconino Counties, the Coconino National Forest, the Northern Arizona Council of Governments (NACOG) and the Arizona Department of Transportation (ADOT), with technical assistance from the Community Transportation Association of America, are exploring innovative and cost effective ways to manage transportation to enhance the region’s livability and preserve its cultural and environmental assets. The following actions are being planned or implemented to support this plan:

3.5.14 *Public Shuttle System:* The City will take the lead role in jointly developing a community shuttle system—the centrepiece of the strategy for increasing mobility and access to the region’s most important attractions while reducing reliance on the automobile. The shuttle system will be designed to provide frequent, convenient and accessible

service within Sedona, between the Village of Oak Creek and the Uptown area, including key attractions within the Red Rock area, and throughout Oak Creek Canyon.

- 3.5.15 *Shuttle Stops:* In-town shuttle stops will be designated adjacent to core commercial areas, major motels and resorts, municipal offices, medical offices and parks. Passenger shelters, benches and other "street furniture" would be constructed, adding to the transit system's convenience and attractiveness to both passengers and non-passengers.
- 3.5.16 *Street Configuration:* The City will enhance car, bicycle and pedestrian access to the shuttle system. The street system needs to be interconnected and provide alternate routes between core business areas and surrounding neighbourhoods without requiring use of major highways.
- 3.5.17 *Bicycle/Pedestrian Connections:* Travel by foot or bicycle will need to be facilitated for shuttle passengers at either end of their trip. A key element of a successful transit system will be a convenient network of sidewalks, jogging paths and bike pathways serving shuttle stops.
- 3.5.18 *Public Transport-Oriented Development:* Public transport-oriented development and public transport-friendly land use would be promoted through a mix of housing densities and higher intensity development in locations easily served by public transport.
- 3.5.19 *Parking:* City officials will need to manage parking to reduce congestion and promote public transport use, including limiting right-of-way parking, create a central parking district, and encourage visitors' to leave their cars at park-and-ride sites and resorts. Forest officials are prepared to limit parking in a number of scenic areas within the national forest. These limits will serve as an incentive for the shuttle system and will help address safety, water quality and other resource issues. A coordinated plan for shuttle and controlled parking will be developed to ensure sufficient access to trailheads, residences, businesses, and developed recreation areas, with the intent of providing strong incentives for forest visitors to leave their private vehicles behind and use a shuttle service.
- 3.5.20 *Permit System:* The Forest Service is considering implementing a "parking pass" or "passport" for drivers accessing the public lands. Studies indicate that this system could provide significant revenue to support the infrastructure of a shuttle system. At the same time, these methods can be used to encourage visitors to use a shuttle system rather than paying for parking. Subsidised seasonal or annual passes would be available for Sedona area residents.
- 3.5.21 *Enhancements:* Shuttle stops will be designated at one mile or less intervals within the Canyon and at vista points elsewhere. Appropriate vehicle turnouts, parking and loading areas, passenger shelters and information kiosks at each stop will also have to be constructed.
- 3.5.22 *Pathways:* It is also contemplated that shuttle stops would be connected by pathways, allowing people the convenience of taking the shuttle,

bicycling or walking to various destinations along the way within the recreation areas.

- 3.5.23 *Gateways:* The partnership between jurisdictions will also allow the development of a network of “gateway” centres and “orientation” sites to serve visitors entering the area. At least four gateways are contemplated. Each would serve as possible "orientation sites", and serve as visitor information centres, day and long-term parking facilities, and transfer points to access the shuttle.
- 3.5.24 Various funding strategies are being considered for this program. Daily charges could be applied for parking on road right-of-ways. Visitors would be encouraged to leave their cars in motel and Inn parking lots, while free or reduced priced parking also would be available at Gateway Centres and other designed areas. Shuttle passes would be available for sale on a daily, seasonal or annual basis. The following rate schedule has been proposed for shuttle bus service:
- \$2.50 Daily Visitor Pass
 - \$10 Monthly Resident Pass
 - \$1 Trip Ticket
- 3.5.25 An alternative is to fund the shuttle system with a national forest entrance fee. Visitors could either purchase a lower-price pass that would allow travel through the area, or visitor “Passport” that would allow entry to the forest, scenic attractions, and recreational facilities, and unlimited use of the shuttle system. Local residents could obtain free or subsidized passes to ride the shuttle.
- 3.5.26 **Talerbus, Switzerland** The Lungau region of Switzerland contains ecologically rich valleys that attract thousands of people each month. With this increased tourism comes car traffic, which contributes to air, noise and water pollution in the area. The highly fragile nature of Alpine ecosystems means that these problems are a significant concern. This project provides electric vehicles, minibuses and taxis to take visitors up the narrow valleys. Talerbuses provide the sole means of access for many of these areas.
- 3.5.27 The talerbus service is integrated with regional bus services under the regional timetabling system, which enables visitors to plan round trip expeditions and to access the talerbuses from towns throughout the region. Those arriving outside of timetabled hours can use a taxi. Stops in the valleys connect to hiking trails and ski lifts.



Figure 3.5: Talerbus Travel Guide

- 3.5.28 A comprehensive travel guide has been produced to provide tourists with the information they need to travel by sustainable modes, as shown in Figure 3.5.
- 3.5.29 Over 300,000 people each year use the Talerbus service, including tourists, local residents and school children. The scheme has now been expanded into the neighbouring region of Murau, allowing more hikers to visit the area without using their cars. Plans are now underway to close valley roads to private car traffic, or to charge cars for entering the valley, as is done in the "Lessachtal" valley.
- 3.5.30 **Travel Information and Car-free Tourism, Zug, Switzerland** The Canton of Zug is located in the central part of Switzerland. Zug is a small Canton with 100,000 inhabitants, accessed in 30 minutes by car and train from the city of Zurich. It is an important leisure destination, especially on weekends for people living in the region. Although the most important leisure areas are well connected by public transport and by the regional bike-path network, most visitors arrive by car. This project aims to promote the use of sustainable transport modes in

- leisure traffic with the implementation of new mobility management services.
- 3.5.31 New services will provide information to visitors on ways to reach this area by public transport or by bicycle (using the existing Zug Tourism website) and by promoting car-free weekend tourism.
- 3.5.32 This project contributes to sustainable tourism development by attracting hikers, who bring economic benefits to the region. Moreover, by integrating with other public transport services this initiative also helps increase public transport ridership in general.
- 3.5.33 **Mobility Management Plan for Genova Valley, Italy** Genova Valley is a tourist site in the Italian Alps, close to the renowned town of Madonna di Campiglio (Province of Trento). The narrow and long valley (17 km) is surrounded by the majestic peaks of Adamello Brenta group and by the Natural Park with the same name. Since the '70s-'80s, Genova valley is a requested destination for one-day excursions during the summer season. In July and August, around 37.000 vehicles drove through this valley, with peak of 1.300 cars a day. A charge too heavy for a delicate natural area.
- 3.5.34 In the summer of 2002, '03 and '04, the "Adamello-Brenta Natural Park" administration decided to reduce the burden of cars on the valley, preserving at the same time its tourist vocation. The opposition of some local administrations to car regulation brought the Park to ask support to Eco-Institute in order to build a new strategy largely based on mobility management.
- 3.5.35 A new approach, based on tourist needs and perceptions, was defined to promote sustainable mobility. Key factor for success was the capability to understand the specific leisure visitors' needs and combine them with new rules and behaviours oriented to sustainable mobility. Specific tourists' attitudes were used as a lever to induce change. This approach increased satisfaction among visitors, attracted new tourists interested in enjoying natural areas and discouraged those having incompatible behaviour with new sustainable mobility regulation.
- 3.5.36 Main activities put in force were:
- Survey and monitor of visitors' attitudes and needs.
 - Identification of a strategy enhancing local attractions coordinated with visitors interests and combined with sustainable behaviour. A slogan for the initiative was introduced "Genova valley: a different adventure".
 - Implementation of light infrastructure measures.
 - Implementation of a strong marketing initiative based on a corporate identity.
 - Introduction of regulation to limit access by car.
- 3.5.37 Infrastructure measures regarded a new bus service to reach different sites in the valley (ticket costs 1€ per ride), bicycle rent service, new attractive pathways ("Waterfall trail") and limited and concentrated parking spaces.

- 3.5.38 Infrastructure and regulation was supported by an intense and relatively innovative marketing campaign based on corporate identity, advertising distributed months in advance in the region and signposting oriented to discourage the use of the car.
- 3.5.39 Thanks to the positive message of the overall campaign, also new restrictions were relatively well accepted by local administrations. A limitation to access in different section of the valley was added to the car parking fee already in force (€4).
- 3.5.40 The results of the mobility management initiatives were quite positive:
- the visitor numbers remained stable;
 - car modal choice decreased from 93% to 82%;
 - the new public transport service reached 13% of modal share;
 - car trips in the valley reduced their lengths and numbers: cars arriving at the end of the valley decreased from 46% to 18%;
 - carbon dioxide emissions decreased of 18% (-12 tons) and those of carbon monoxide of 25% (-0,9 tons);
 - space for parking was reduced of 13%;
 - the costs of the initiatives were balanced by parking and public transport fees.
- 3.5.41 The Genova Valley example gave birth to the idea of a sustainable mobility plan for the all area around the National Park. The plan is currently under study.
- 3.6 Summary
- 3.6.1 The review of national and international best practice has proven to be a very useful exercise in identifying sustainable transport products and/or services for improving access to visitor attractions. Products and services can be broadly defined by the following groups:
- Ticketing/Fiscal measures
 - Provision of Information
 - Marketing and Promotion
 - Integrated transport services
 - Private transport services
- 3.6.2 These groupings are expanded on in more detail below.
- Ticketing/Fiscal Measures***
- 3.6.3 The use of ticketing as a tool to encourage tourists to visit attractions by bus and rail has been shown to be a very effective product nationally and internationally. The product requires the cooperation of public transport operators and visitor attractions, to agree on the make up of the product and the division of revenues. Critical to the success of this product is the level of accessibility provided by public transport networks at a regional and local level.
- 3.6.4 Northern Ireland benefits from the having a single operator for all bus and rail services (Translink), and the use of integrated ticketing is already available albeit within the confines of the public transport system. Translink currently provide a *Freedom of Northern Ireland*

Ticket, which comes in the form of 1 Day (£15), 3 out of 8 Day (£36) and 7 Day (£53) tickets, available from main bus and rail stations. The tickets enable unlimited travel on all scheduled bus and rail services within N. Ireland.

- 3.6.5 The key component to linking this product to tourism is by combining the public transport tickets with access to the visitor attractions, as is the case with the *Freedom of Wales Flexi Pass*.

Information

- 3.6.6 The provision of information on both visitor attractions and access by sustainable modes, has been proven to have a significant impact on the number of visitors to attractions. Although a significant element of providing visitors with information on travel and access to attractions is dealt with through various marketing initiatives, other examples of best practice were also identified.

- 3.6.7 The critical lesson here relates to the stages of a visitor/tourists journey i.e. ensuring that they have access to all necessary information at each stage, from pre-planning to arrival and enroute. The provision of a guide detailing travel by public transport in an area has proven successful, such as the scheme run by Attractions of Snowdonia in Wales.

Marketing and Promotion

- 3.6.8 Although presented here as a separate product/service, marketing and promotion is clearly a necessary accompaniment to all products/services, and is complementary to the provision of proper information on travel and attractions.

Integrated Transport Services

- 3.6.9 The integration of public transport services has proven to be a successful service for improving access to visitor attractions in Great Britain, as was the case within the Western Isles. Integration requires coordinated timetables and travel information, and in addition, integrated ticketing. Indeed, it is important to note that integrated transport in the context of tourism travel will encompass all modes of travel i.e. bus, rail, walking, cycling and car/taxi. A case in point is the *Dales Bike Bus* which combines cycling with bus travel in a rural context.

- 3.6.10 The review of best practice has highlighted the use of shuttle bus services, particularly in the USA, to fill the gap in conventional public transport services. Importantly, however, is the integration with regional and local bus services.

Private Transport Services

- 3.6.11 The provision of private transport services, including tour operators and less conventional providers such as airport bus transfer services, have a vital role to play in the provision of sustainable tourism transport. However, there are some distinct differences between tour operators and, for example, airport transfer operators i.e. tour operators services

are usually driven by demand, and therefore routes and attractions visited will be dictated by tourists. On the other hand the airport transfer services operate on fixed routes, providing regular and frequent access to attractions that may be located on these routes. Airport services could be driven by outward tourism or business travel demands. That said, they provide a service which collects international visitors at the point of entry to the country and therefore have potential to be a part of the overall tourism transport provision.

3.7 The Toolkit

3.7.1 Based on the findings of the consultation exercise and the review of national and international best practice, a 'toolkit' of products/services has been identified which could be used to 'fill the gaps' in provision in the Western Region.

- Integrated ticketing for access by public transport and access to visitor attractions
- Discount schemes for travel, accommodations, restaurants, cafes and the visitor attractions
- Shuttle bus services to visitor attractions located within the environs of an urban area
- Provision of travel information at all stages of the visitor/tourist's journey – through websites linked to tourism agencies and public transport operators
- All encompassing guide to travel, accommodation and visitor attractions within a region
- Integrated public transport services – timetabled services covering bus and rail
- 'Bike Bus' schemes – buses with bicycle trailers
- Discount schemes for coach parking
- Coach parking facilities at attractions and within hubs

3.7.2 These measures and schemes are further examined at the end of Chapters 5 in terms of the 'gaps' in access to and within the Western Region, and in Chapter 6 in the development of the strategy for the Western Region.

4 Transport Audit

4.1 Overview

4.1.1 In order to understand the current situation in terms of tourism transport in the Western Region, an audit was undertaken of existing transport services both conventional, in the form of public transport services and unconventional such as private tour operators.

4.1.2 Services were identified which directly or indirectly served one or a number of the Hubs in the Western Region. The attractions served by local transport services from these Hubs were then examined. Attractions which were not served directly were 'in filled' with connections in the form of other modes of transport such as walking or taxi services, on the basis that visitors would have to make several mode changes to reach an attraction.

4.1.3 This information was then used to develop a comprehensive database of existing transport provision, including information on the number of daily, weekly and in certain cases yearly services. The database was then imported into GIS, using MapInfo, and a spatial analysis of accessibility was undertaken to establish gaps in the provision of transport to visitor attractions in the Western Region.

4.1.4 A 3-tiered approach or hierarchy of accessibility (see Figure 4.1) was then applied to identify the level of accessibility for each attraction, as follows:

1. Direct connections between Gateways and attractions;
2. Indirect connections between Gateways and attractions via Hubs, with transfers to local bus services/cycle; and
3. Indirect connections between Gateways and attractions via Hubs, with transfers to hire car or local taxi.

4.1.5 The latter representing the least sustainable and mostly costly option for visitors.

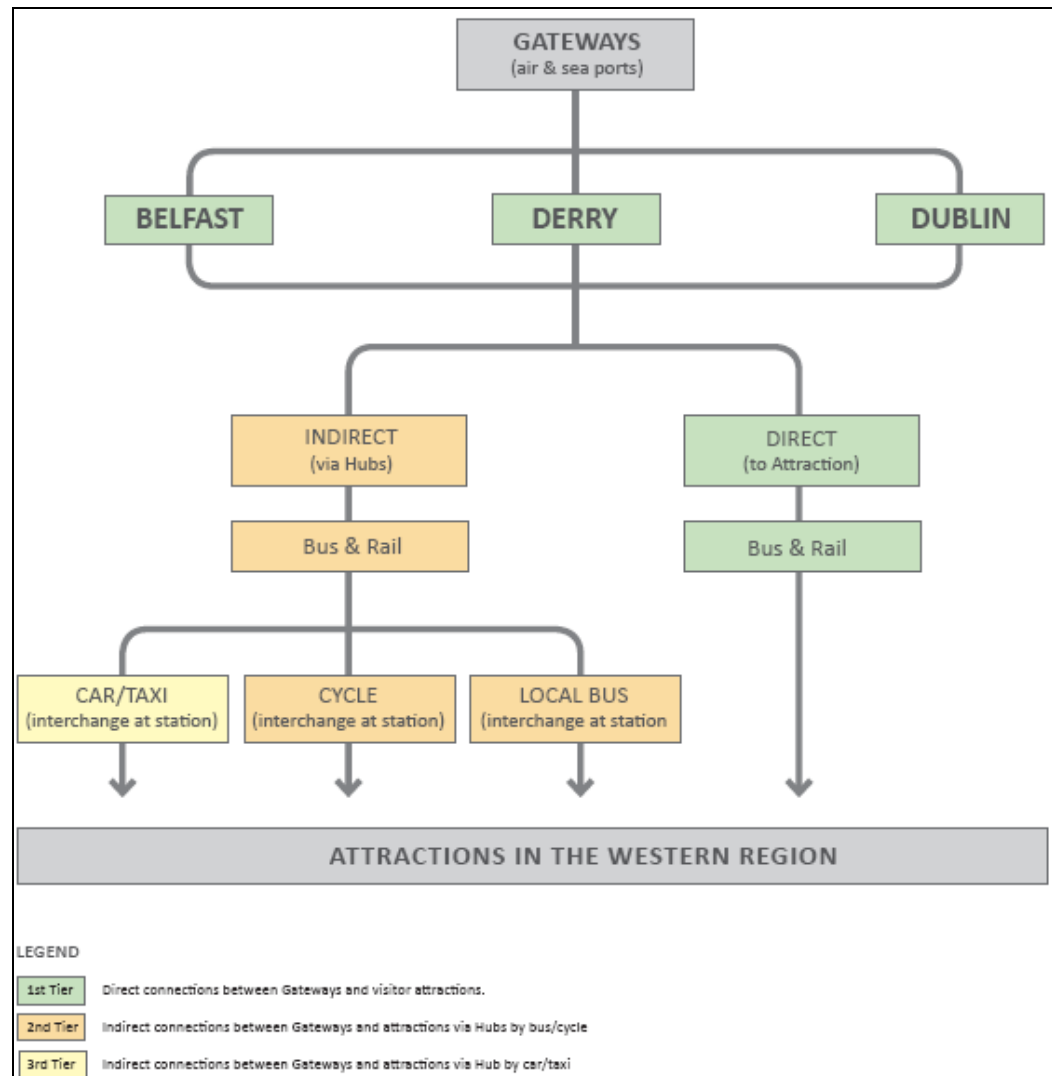


Figure 4.1: The Hierarchical Approach to Accessibility

4.1.6 In addition, private transport options, including tour buses and airport bus services, have been examined separately. The results of this analysis are presented in the following sections.

4.2 Existing Transport Services

4.2.1 The Western Region is largely rural in nature and is therefore served not by a transport network i.e. an integrated system of transport services, but rather by a number of discrete routes and services.

- **Public Transport:** In Northern Ireland all public transport (bus and rail) services are operated by Translink. In addition Translink also operate a number of *Day Tours* throughout the province. With the exception of the northern part of County Londonderry, there are no other rail services in the Western Region. Bus services are the principal form of public transport available. Therefore the principal mode of public transport in the Western Region is bus, both inter-

urban and local bus services. Inter-urban services operate between the cities (Gateways) and regional towns (Hubs). Local services operate out of the regional towns serving local communities and for travel to villages and hamlets. A map of the bus services is shown later on in Figure 4.10.

- **Private Transport:** In addition to public transport are a number of privately operated services which include tour bus/coaches and Airport bus services. The latter are important as they are pick up visitors at the point of entry to the country and usually operate routes between Gateways.

4.2.2 In examining the current situation in terms of transport provision in the Western Region a number of less conventional forms of transport were considered, including School transport services and Rural / Community Transport Schemes.

- **School transport:** School transport is currently provided by a combination of public transport services (Translink), Education and Library Board buses (Yellow Buses) and private operators.
- For the purposes of this study it would seem somewhat obvious that the vehicles operated by the education and library boards would be underutilised during the summer holidays and could be used to in what is the high season for tourism. However, discussions with the Education and Library Board have revealed that they are not legally obliged to undertake private work⁷ and they are chartered to work for school pupils from the region only. Therefore we have discounted the use of school transport in the Visitor Management System.
- **Rural / Community Transport:** There are a significant number of organisations within the Western Region who operate/manage Rural/Community transport schemes, including:
 - Cookstown Rural Community Transport;
 - Dungannon and District Community Transport;
 - Bridge Accessible Transport;
 - Fermanagh and Tyrone Rural Transport;
 - Easilift;
 - Rural Lift for SW Fermanagh;
 - Foyle Connect Rural Transport;
- These schemes are designed to meet the needs of people who are disadvantaged by not being able to use either conventional public transport or private transport, because they cannot afford it or the have a mobility impairment, or because the rigidity of such services do not meet their needs.
- These schemes operate within a confined area and are largely *demand responsive* and flexible in choice of route, rather than fixed in nature. After consultation with the Director of the Rural Transport schemes it was revealed that all the transport schemes in the Western Region are currently working under the Section 10b

⁷ Currently operating under the Section 10b permit in Northern Ireland

permit which does not allow private operations. However, discussions revealed that in the future some of the operators in the Western Region may become trading arms which would allow private work and possibly be used for tourism purposes.

- **National Cycle Network:** There is approximately 1,135 miles of designated cycle network in Northern Ireland, which have been designed to facilitate leisure and commuting trips. With regard to the Western Region all of these routes – the Atlantic Challenge, the Coast to Coast Challenge, The Kingfisher Trail, the Loughshore Trail and the Sperrins Cycle Routes along with the North West Cycle Trail - all provide scope not only for linking with transport services but also for facilitating cycle tourism.

4.2.3 Whilst cycling would not be expected to improve accessibility to the region by itself, when combined with bus and rail it can play a positive role. The use of cycling to move within the Western Region from designated hubs has therefore been considered.

4.2.4 In order to understand the level of provision of transport to and within the Western Region, a comprehensive database of services was compiled which formed the basis for the audit. This audit was then imported into GIS to enable a spatial analysis of accessibility to be undertaken. A detailed analysis is carried out later on in the study (see Figure 4.12).

4.2.5 The following sections outline the findings of this process based on the 3-tiered/Hierarchical approach discussed earlier.

4.3 Direct Connections between Gateways and Visitor Attractions

4.3.1 The first step in the 3-tier approach examines direct connections between Gateways and visitor attractions which includes;

- Inter-urban bus
 - Ulsterbus
 - Bus Éireann
- Rail
 - Northern Ireland Railways
 - Irish Rail

4.3.2 Figure 4.2 presents an illustration of the connections between the Gateways and the Western Region. Principally the connections are by bus, however, as the illustration shows, connections are also possible by rail.

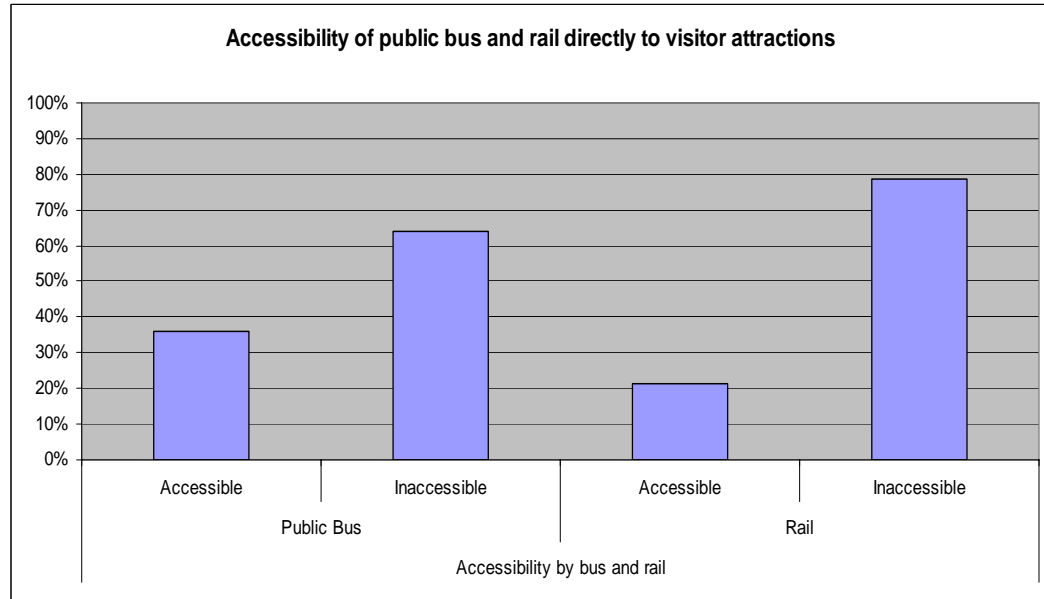


Figure 4.3: Percentage of attractions served directly by public bus/rail

4.3.5 Overall 36% of the attractions are currently served directly from gateways. It is important to note that this statistic is exclusive to direct services. This means that passengers board public transport at a Gateway and when they alight they are within walking distance to an attraction.

Direct Rail Services

4.3.6 NI Railways operate a train service on the Londonderry Line between Belfast and Derry City. This connection runs 9 times on weekdays and Saturdays and 5 times on Sundays. These services provide a connection between the Gateways of Belfast and Derry City.

4.3.7 This is an important connection because it is also possible to travel between Derry City and Dublin, with an interchange required at Belfast. Visitors/tourists can travel to two of the island's principal city attractions and then into the Walled City of Derry within the Western Region itself. Derry City can then act as a base for onward travel by bus around the Western Region.

4.3.8 The rail line can be seen as an attraction in its own right given its coastline hugging route along the north and northwest of Northern Ireland. The railway network, although limited in size, presents a very useful way of attracting tourists into the Western Region, making Derry City a key Gateway/Hub for the dispersal of visitors throughout the Western Region.

4.4 Connections between Gateways and Hubs

4.4.1 The second step of the 3-tier approach in the audit was to examine the connections between the main sea and air ports in both Northern Ireland and the Republic of Ireland to the Hubs of the Western Region. As

connections between Gateways and attractions can always be made by car this study focuses on sustainable modes, i.e. public transport.

- 4.4.2 The frequency of public transport services linking both Dublin and Belfast with the Hubs within the Western Region was investigated and the results are shown in Figure 4.4. The weekday frequencies and weekend frequencies were examined separately. It is important to note that the weekend frequency is defined as the average frequency of both Saturday and Sunday services.

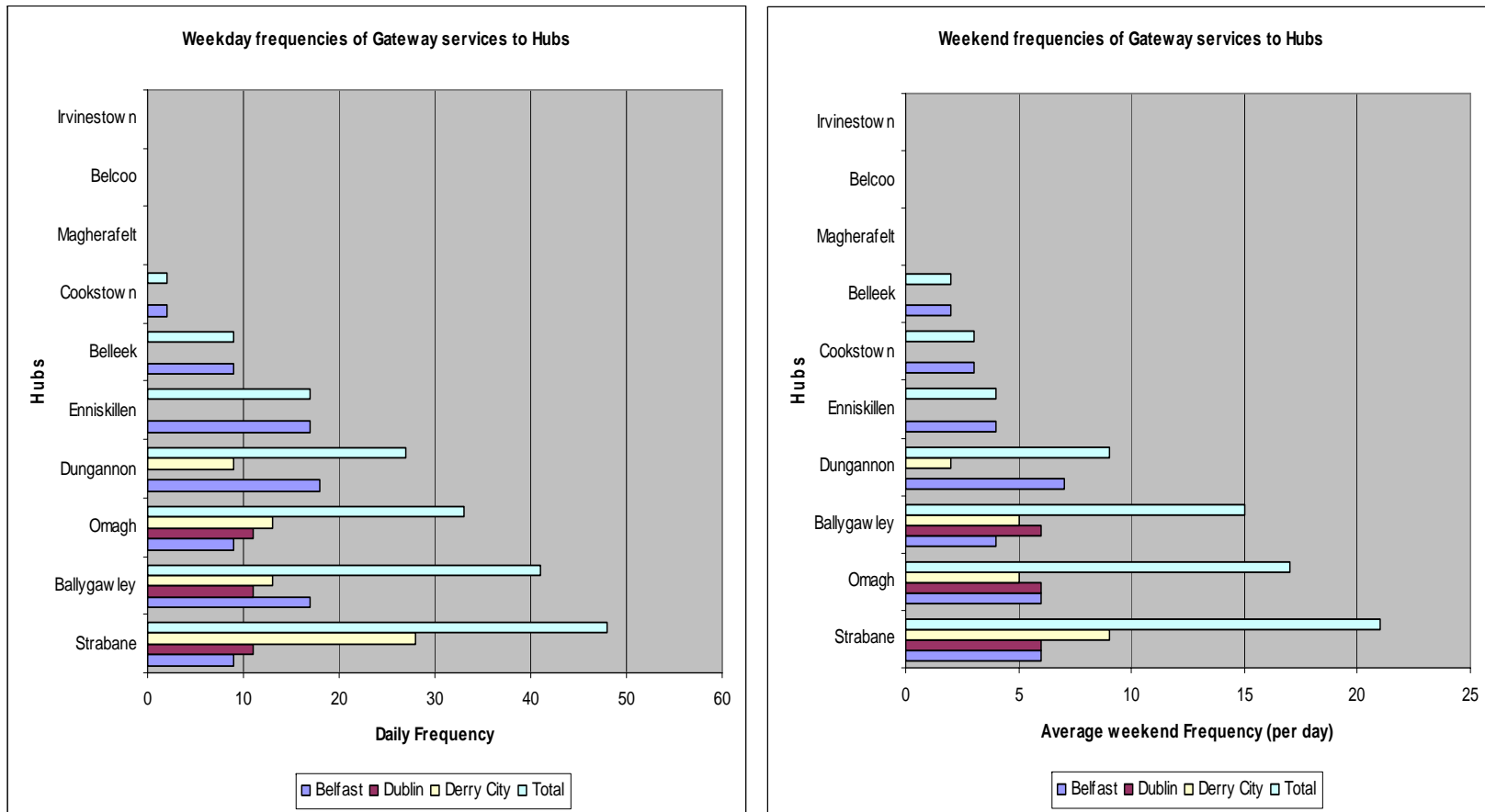


Figure 4.4: Frequencies of bus services from Gateways to Hubs in the Western Region

Belfast to Western Region

4.4.3 Belfast has connections to the Western Region via both public bus and rail. The frequencies of these connections are displayed in Figure 4.4.

4.4.4 The catchment areas of Hubs and number of attractions within these catchment areas are shown in Table 4.1 and Figure 4.5. As shown in Table 4.1, Cookstown and Magherafelt have 3 and 4 visitor attractions respectively.

Table 4.1: Number of attractions within catchment of the Hubs in the Western Region

County	Hub	Number of attractions within the catchment ⁸
Derry	Derry City	21
Fermanagh	Enniskillen	7
Tyrone	Omagh	7
Fermanagh	Irvinestown	5
Tyrone	Dungannon	5
Tyrone	Strabane	4
Tyrone	Cookstown	4
Derry	Magherafelt	3
Fermanagh	Belcoo	2
Tyrone	Ballygawley	2
Fermanagh	Belleek	1

4.4.5 However, compared to the provision of public transport to other Hubs in the Western Region from Belfast, there is relatively limited service to Cookstown and Magherafelt (see Figure 4.4).

⁸ Within a 4 mile radius – based on the size of catchment served by local bus services (Information supplied by Translink)

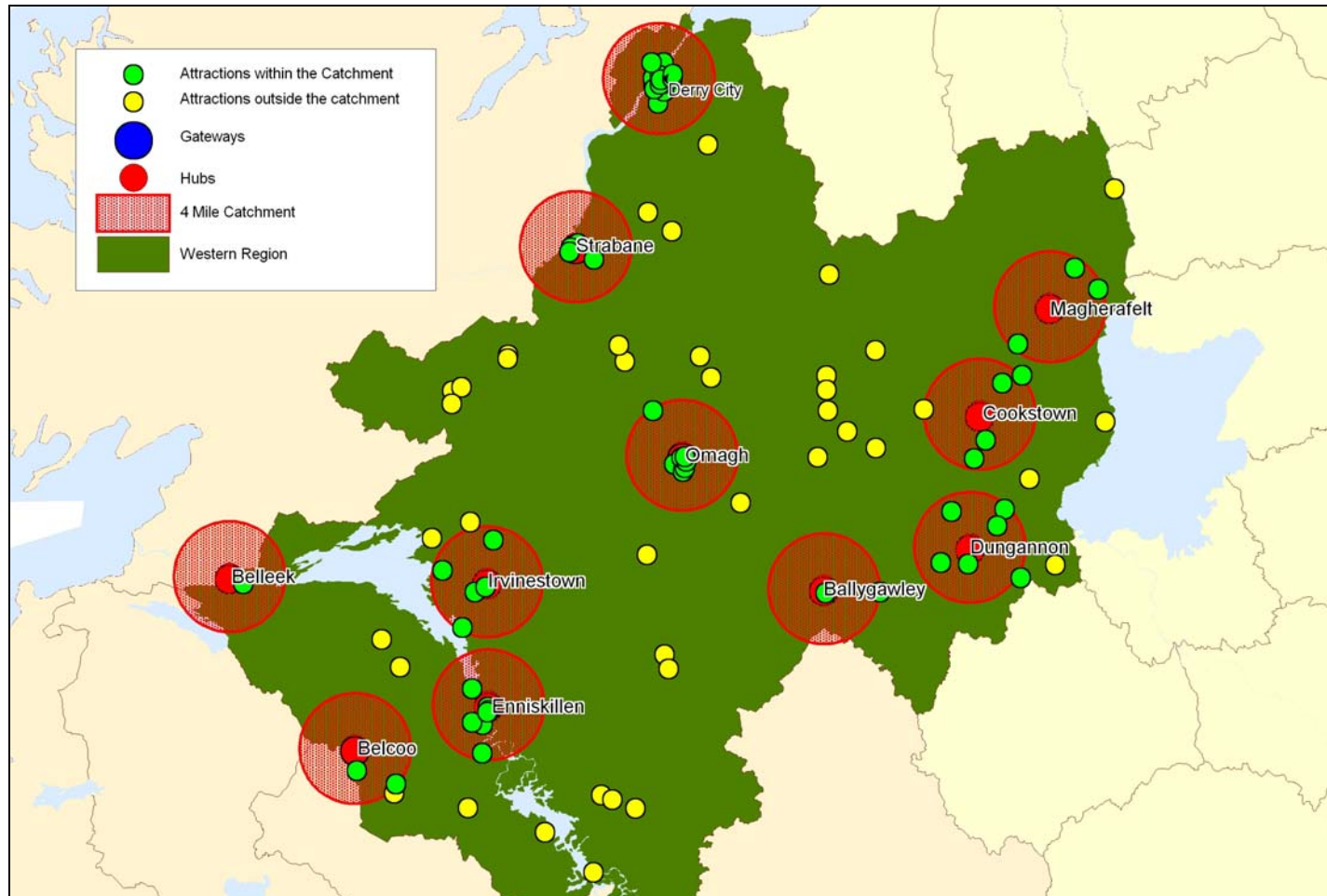


Figure 4.5: Attractions within a 4-mile radius of Hubs

Dublin to Western Region

- 4.4.6 Dublin has connections to the Western Region via Bus Éireann regional services. However, there are no rail services connecting Dublin directly with the Western Region. The frequencies of these bus services are displayed in Figure 4.4.
- 4.4.7 The Hubs that Dublin has direct connections to include Omagh and Strabane, both of which have 11 weekday services and 6 weekend services.
- 4.4.8 Enniskillen has the second highest number of attractions within its catchment with 7. However, it is not served directly from Dublin via public transport. Visitors are required to change buses at Ballygawley with a 55 minute wait.
- 4.4.9 Table 4.1 shows the number of attractions within the catchment area of the Hubs in the Western Region. Magherafelt, Cookstown and Dungannon have 3, 4 and 5 attractions respectively, but cannot be accessed directly from Dublin via public transport. Overall, this evidence suggests that Enniskillen, Dungannon, Cookstown and Magherafelt do not have an adequate provision of public transport services from Dublin relative to the number of attractions in the Regions.

Derry City to Western Region

- 4.4.10 Derry City is a Gateway already located inside the Western Region and has direct connections to the Dublin Gateway via both public bus and air. The Derry City Airport known as the “City of Derry Airport”, in addition to Dublin, has connections to Birmingham, Glasgow, Prestwick, Liverpool, London Stansted, Luton and Alicante (new in June 2009). Derry City has also direct connections to Belfast via public bus and rail.
- 4.4.11 The Hubs which Derry City has direct connections with include Ballygawley, Strabane, Omagh and Dungannon. The frequencies of these connections are displayed in Figure 4.4.
- 4.5 Connections between Hubs and Visitor Attractions
- 4.5.1 The third step in the 3-tier approach was to examine the connections between the Hubs and the visitor attractions.
- 4.5.2 A multi-modal approach was used in this section of the audit. The two different categories for multi-modal connections were as follows.
- Connections from Hubs via local bus or cycle network
 - Connections from Hubs via car or taxi
- 4.5.3 The latter being the least sustainable and least cost effective mode but is the only viable mode of transport to the visitor attraction.
- 4.5.4 Initially the distances from the Hubs to the visitor attractions were investigated. The results were broken down into 5 categories and are displayed in Figure 4.6.

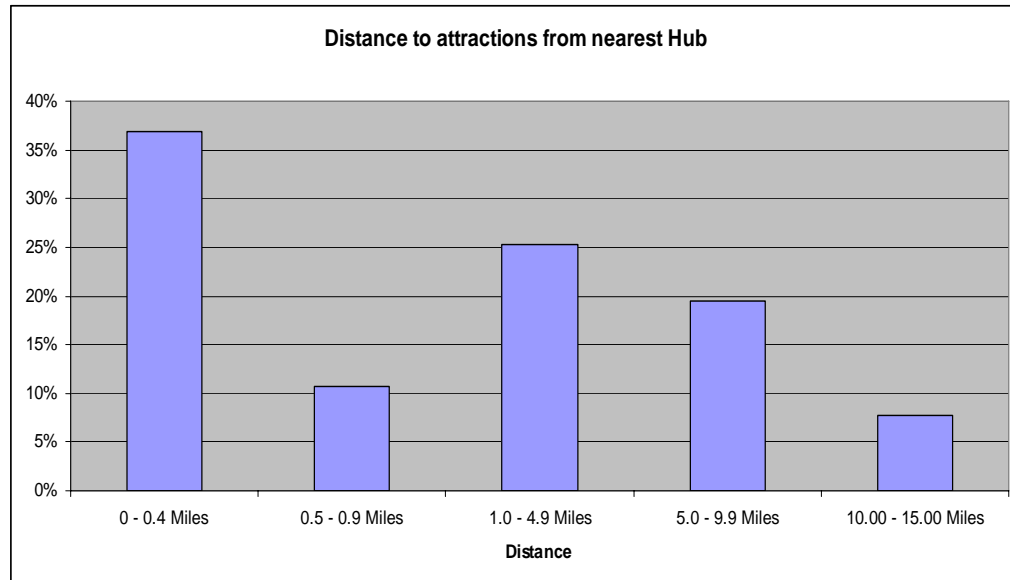


Figure 4.6: Distances to attractions from nearest Hub

4.5.5 Figure 4.6 demonstrates that 73% of the visitor attractions in the Western Region are located within 5 miles of the nearest Hub. As the majority of 73% of attractions are located within 5 miles of their nearest Hub this would suggest that a high percentage of attractions should be accessible via local bus connections. However, this is clearly not always the case.

4.5.6 The 2 primary types of connections from Hubs to visitor attractions are defined as:

- **Local bus** – A local bus service is available from a Hub directly to the visitor attraction
- **Car/Taxi** – A car or taxi is the only type of connection available from the Hub to the visitor attraction

4.5.7 It is important to note that the results for whether the attraction was “located within walking distance from nearest bus stop” was validated by the visitor attraction operators. The available connections to the visitor attractions were investigated and analysed. Figure 5.5 shows the types of connection to the visitor attractions from their nearest Hubs.

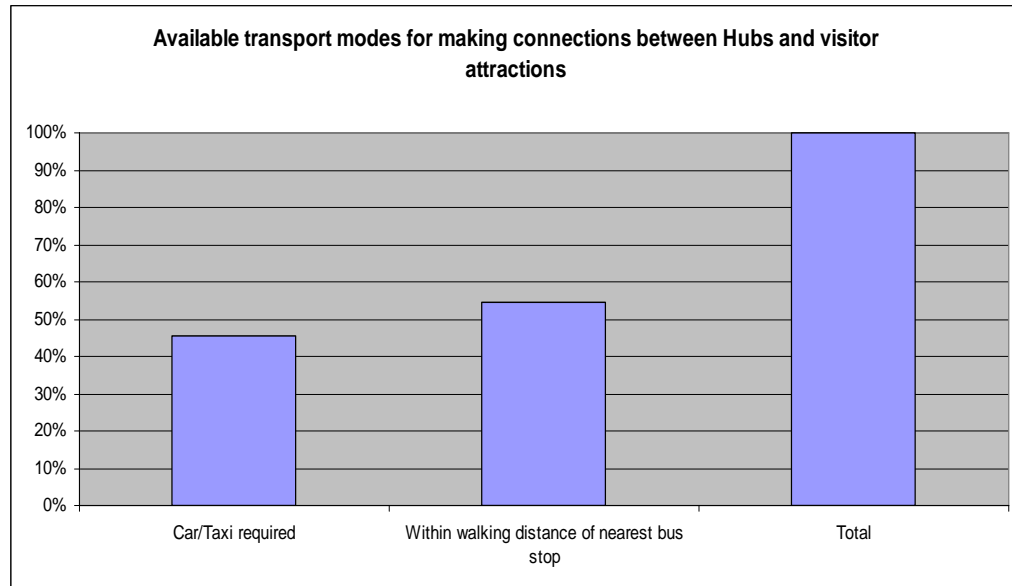


Figure 4.7: Available modes for making connections between Regional towns and attractions

4.5.8 The breakdown of available connections is such that 54% of visitor attractions are served directly by public bus or within walking distance from their nearest bus stop and 46% require a car or taxi in order to visit. Further analysis showed that 36% of the attractions are served directly by public bus from a Gateway and a further 18% are accessible indirectly from a Gateway by public bus and walking.

Conventional Public Transport Services

4.5.9 With almost 55% of visitor attractions served directly or located within walking distance from their nearest public bus stop (see Figure 4.7), additional analysis was carried out which involved investigating the number of public bus services to the visitor attractions on a weekday and weekend basis.

4.5.10 The number of weekday and weekend services were examined separately. Weekend services being defined as the average of both Saturday and Sunday services. Figure 4.8 and Figure 4.9 respectively, display the results of the number of weekday and weekend services within walking distance of the visitor attractions.

4.5.11 In Figure 4.8 and Figure 4.9 services are displayed thematically with the higher intensity of colour representing a higher frequency of service to that visitor attraction.

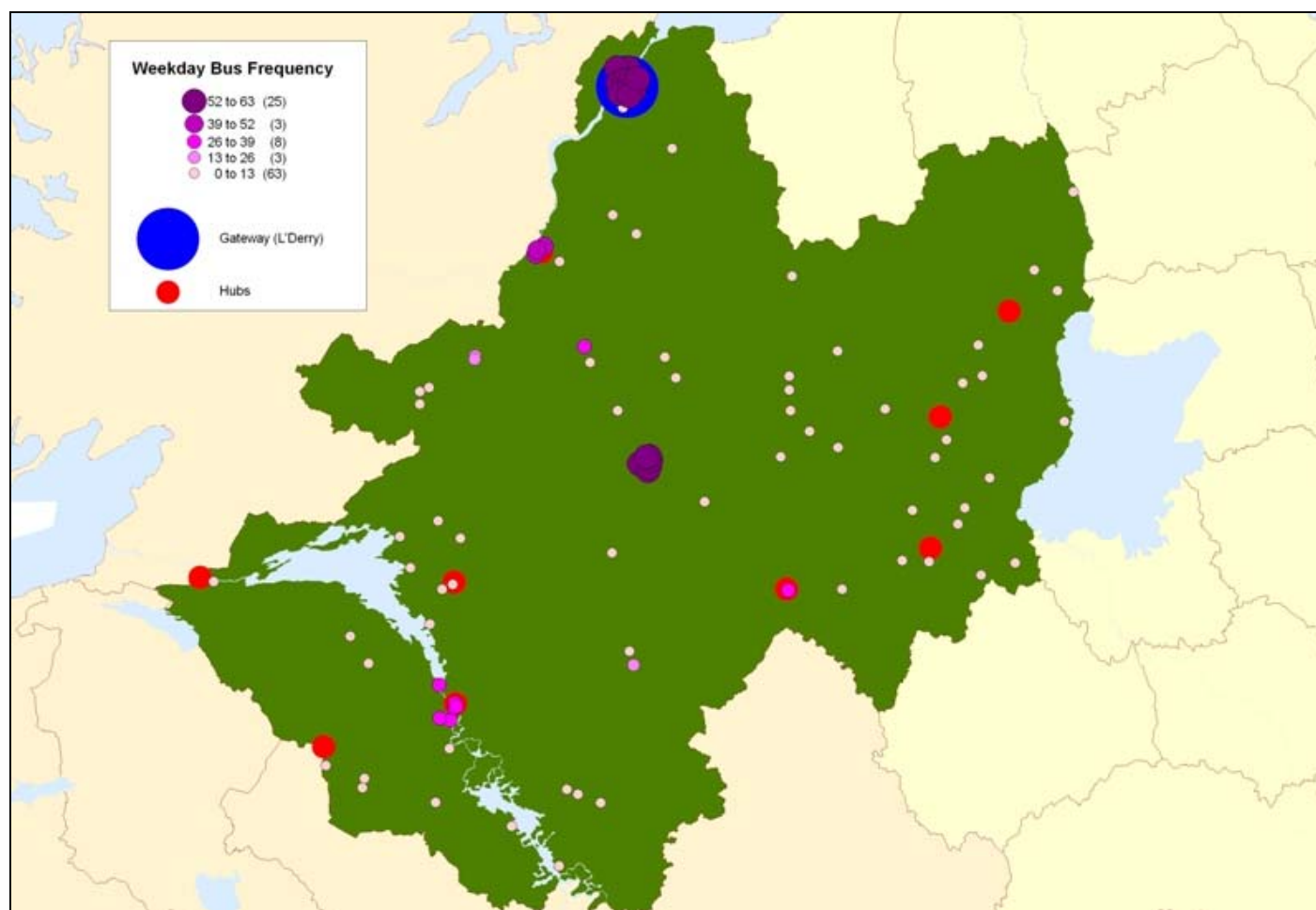


Figure 4.8: Weekday frequency of bus services to attractions

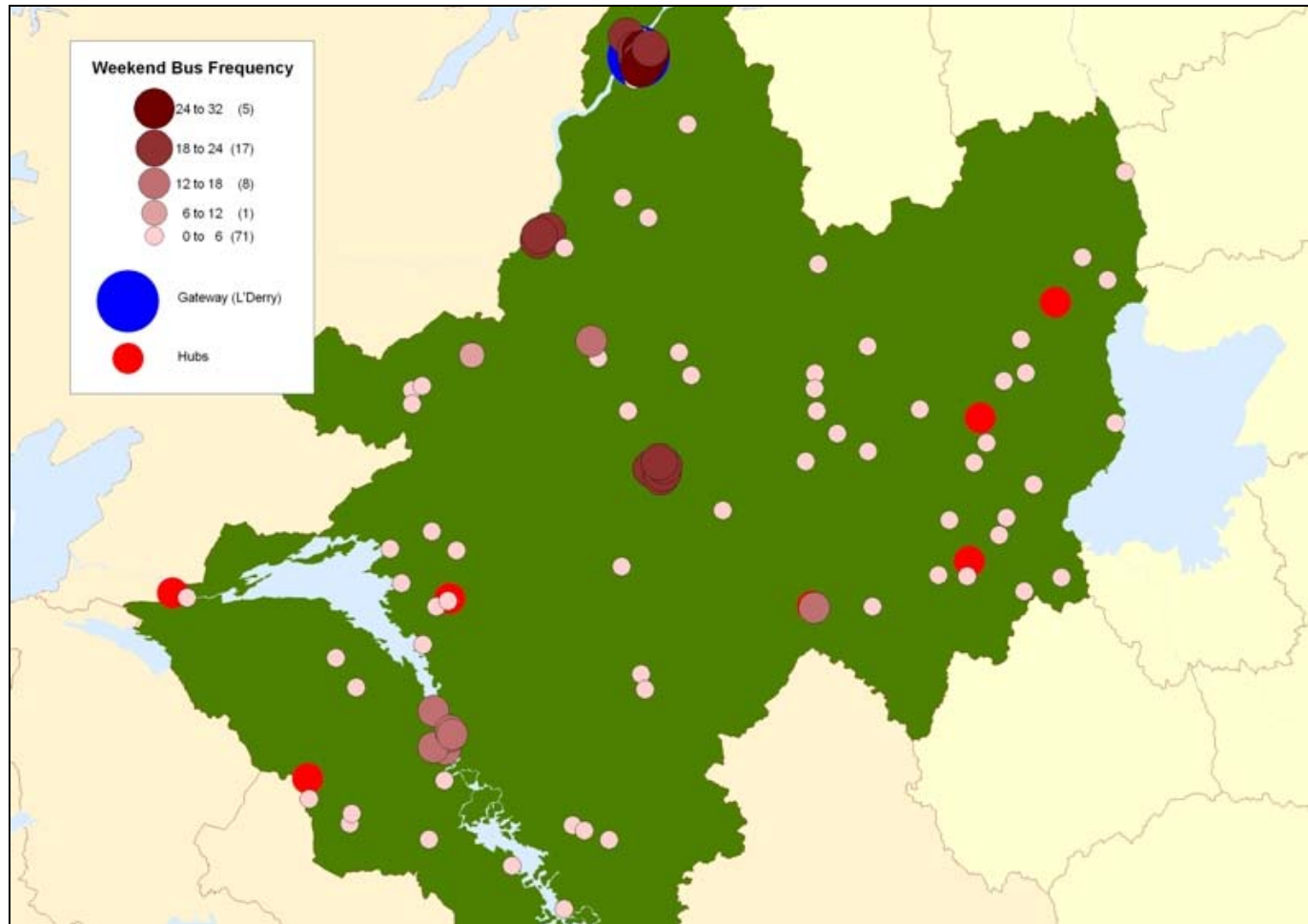


Figure 4.9: Weekend frequency of bus services to attractions

- 4.5.12 The results show that the centrally located attractions in Derry City, Strabane Omagh and Enniskillen have relatively frequent weekday and weekend services.
- 4.5.13 Figure 4.7 revealed that 46% of attractions can only be accessed by a car or taxi from their nearest Hub which are identified in Figure 4.8 and Figure 4.9. It is also important to consider the location of these attractions in order to identify any gaps in the provision of transport. Figure 4.10 presents a map of the attractions throughout the Western Region that can only be accessed by a car or taxi.

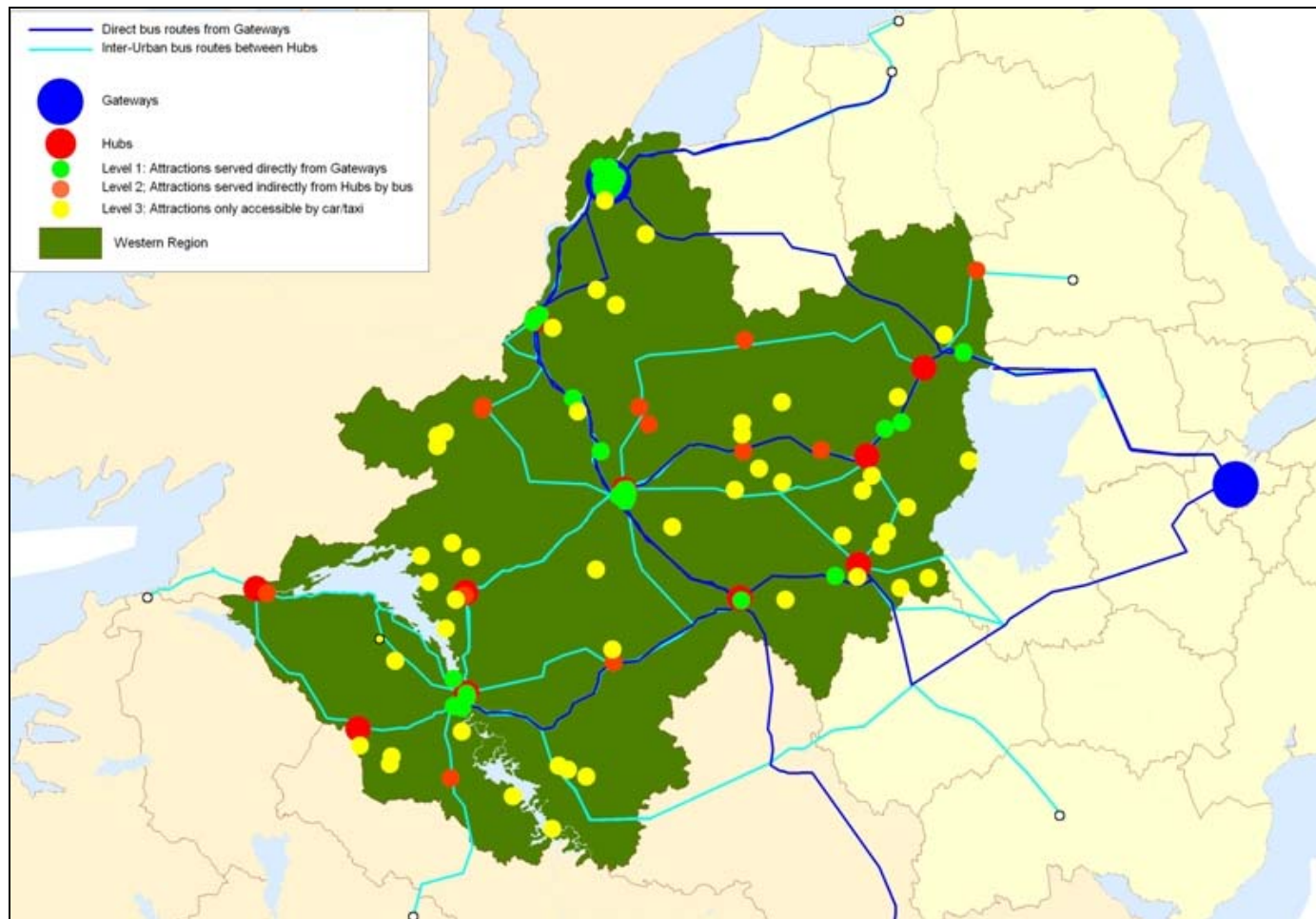


Figure 4.10: Modes by which attractions can be accessed

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- 4.5.14 Figure 4.10 shows the means by which attractions in the Western Region can be accessed by visitors, indicating their position on the three-tiers of accessibility and the potential for sustainable travel. Where more than one mode is available, the higher tier option has been shown.
- 4.5.15 The geographical patterns are clear, as shown in Figure 4.10, which illustrates that attractions close to larger towns and along bus routes are more likely to be accessible by sustainable modes (public transport and walking) whereas the primary gaps in provision of transport are located in the following areas:
- Along the east of Lower Lough Erne between Irvinestown and Belleek
 - On the east of the Dungannon Region travelling north towards Cookstown.
 - Directly between Cookstown and Omagh in a north-south direction.
 - In the Belcoo Region and west of Castlederg.
- 4.5.16 There is therefore potential to improve access to tourism in the Western Region by creating new public bus services or the alteration of existing services to fill those deficiencies.

Cycling Routes

4.5.17 Since cycling tourism has a positive role to play in the overall tourism offer in the Western Region, it was considered as a mode of travel which could bridge the gap between bus services to Hubs and attractions. On this basis, routes within the region which form part of the national cycle network were examined.

4.5.18 There are a number of long distance cycling routes in the Western Region that are on the national cycling network in Northern Ireland including;

- Atlantic Challenge (Routes 92, 93 and 95)
- Coast to Coast Challenge (Routes 91, 92 and 95)
- Kingfisher Trail (Route 91)
- Loughshore Trail (Route 94)
- Sperrins Cycle Routes (Route 95 and other regionally numbered (1 to12) cycle network routes)

4.5.19 The relationship between national cycling routes and attractions in the Region was examined in the audit and the results are displayed in Figure 4.11.

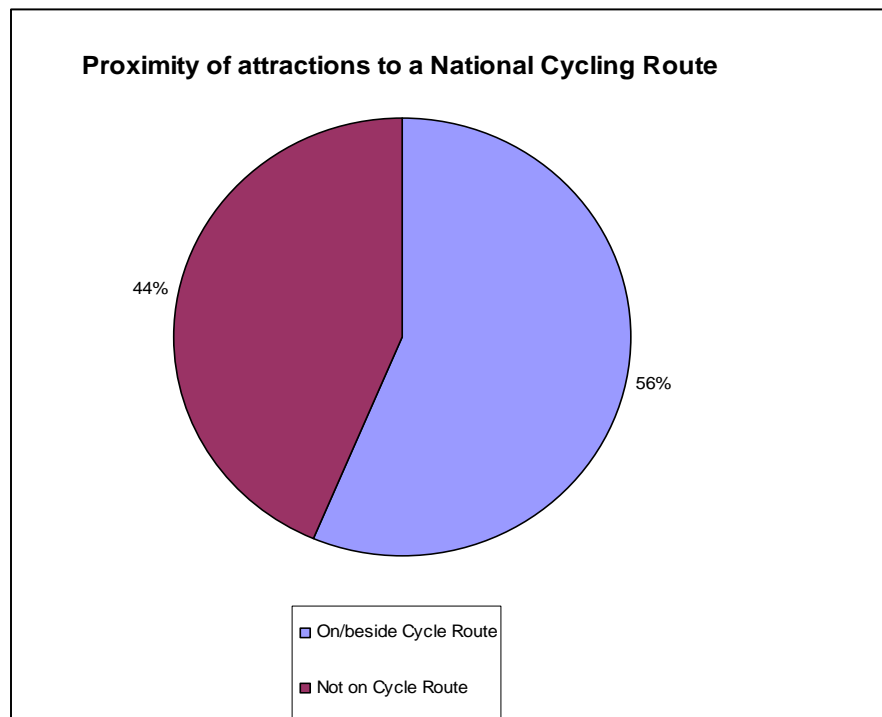


Figure 4.11: Proximity of attractions to a designated cycle route

4.5.20 Figure 4.11 shows that approximately 56% of the attractions in the Western Region are located on or beside a cycle route. A visual representation of the locations of the national cycle routes in comparison with the visitor attractions is shown in Figure 4.12.

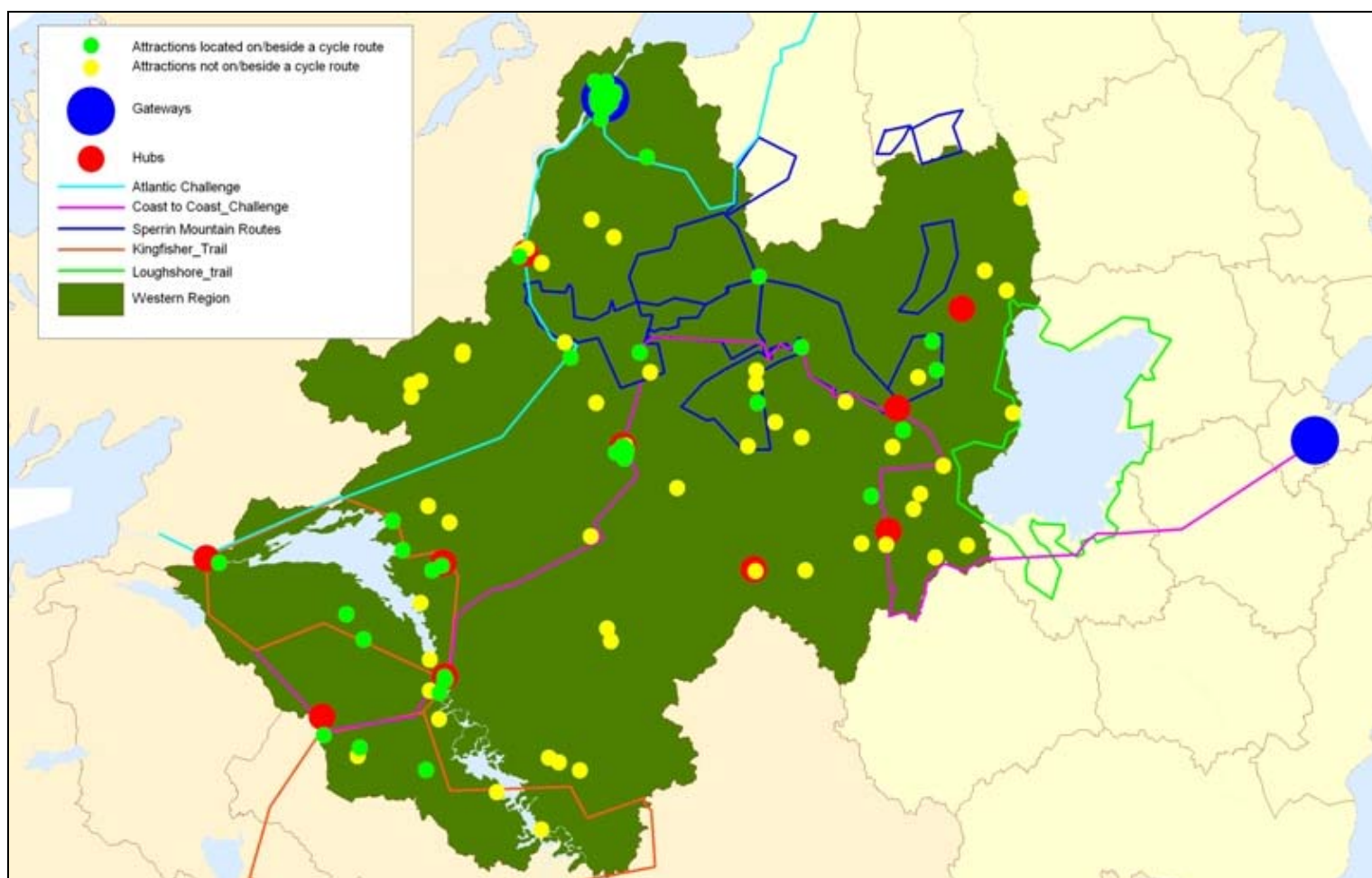


Figure 4.12: National Cycling Network in Northern Ireland

- 4.5.21 The North West Cycle Trail links with the National Cycle Network (Route 92 to Derry, the Kingfisher Trail, Route 91) and also links with the Innishowen Cycle Route. The National Cycle Network covers the regions of Enniskillen, Derry City, Coleraine, Portrush, Portstewart and the Sperrins. As shown in Figure 4.12 a high percentage of attractions are located within the vicinity of the cycle routes. Direct connections to Gateways and Hubs are as follows:
- The Atlantic Challenge is linked directly to Belleek, Strabane, Derry City, Limavady and Coleraine
 - The Coast to Coast Challenge is linked directly to Belleek, Enniskillen, Omagh, Cookstown, Dungannon and Belfast.
 - The Kingfisher Trail is linked directly to Belleek and Enniskillen
 - The Loughshore Trail is not linked directly to any Gateway or Hub.
 - The Sperrins Routes are linked directly to Cookstown, Strabane and Omagh
- 4.5.22 The carriage of bicycles on public transport is a particular issue in terms of maximising access through integrated public transport, Translink have a very clear policy as follows:
- All bicycles (subject to conditions below) will be carried FREE of charge on buses.
 - A maximum of 2 full sized bicycles can be carried at any one time in the luggage boot of Goldline Express Coaches. Space will be allocated on a first come first served basis, and at the discretion of the driver. There will be NO bicycle reservation system.
 - Bicycles will not be permitted on buses prior to 09:30 hours Monday to Friday
 - There are NO travel restrictions nor limit to the number of folding bicycles we can carry, provided these are completely folded down.
 - Tandems, tricycles, motorcycles, mopeds, motorized cycles and scooters are not permitted on any bus.
 - Bicycle parking shelters are available at any main stations throughout the bus network (see Translink's leaflet Bicycle Park & Ride).
 - Bicycles cannot be carried on non-Goldliner coaches and seasonal rambler.
- 4.5.23 Whilst having a policy on the carriage is to be welcomed and indeed the absence of any additional charge should be recognised, there remain possible impediments to the tourists needs, including:
- Putting time restrictions on when bicycles can be carried, and
 - Restricting the carriage of bicycles on Rambler services which are directly targeted at visitors/tourists.
- 4.5.24 Whilst the former point can be understood in that the period before 0930 is the peak time for travel particularly for commuters, the latter is a barrier to integration and access for cycle tourism.

4.6 Private Transport Services

Tour Coach Operators

4.6.2 There are a range of private operators providing tourism transport services available. This includes conventional tour operators and more specialist operators such as *Eco Tours*⁹.

4.6.3 In total, 10 private tour operators¹⁰ were identified that provide 23 tours throughout the Western Region and it is important to note the following three points in relation to the private tour operators.

- The majority of the tours provided only operate once a week with the exception of the Derry City Tour which operates 6 times daily.
- Tours provided by *Translink* and *Kavanagh Travel* operate seasonally and these operators only provide 4-6 services for each of their tours annually.
- With the exception of the *Translink Tours*, *Erne Heritage Tours* (which is a tour guide organisation as distinct from being a tour operator) and both the Derry City Tours, all other tours are multi-day tours and cannot be completed in a single day.

4.6.4 The proportion of total numbers of attractions visited by tours is displayed in Figure 4.13. The chart also identifies from where the tours originate.



Figure 4.13: Proportion of attractions visited by tour buses

4.6.5 In total, only 17% of the attractions are visited by tour operators and therefore, 85 of the 103 attractions in the Western Region are currently not visited by tour operators.

⁹ A tour guide organisation offering a range of outdoor multi-day tours

¹⁰ Translink Tours, Erne Heritage Tours, CIEs Tours international, Kavanagh Travel, Ireland Eco Tours, Paddy Wagon Tours, Tours n' Trails, Opentop Tour, Cuilcagh Tours, Authentic Travel Ireland

- 4.6.6 This means that of all attractions served by tours 88% originate within the Region. Approximately 16% of the attractions are served via tours originating within the Region.
- 4.6.7 The proportion of attractions within the catchment of a Regional town served by private tours was investigated and the results are shown in Figure 4.14.
- 4.6.8 Figure 4.14 shows that a relatively small number of Hubs are currently being served by the majority of private tours. Enniskillen, Derry City, Omagh and Belleek all have a high number of tours visiting their catchment relative to the actual number of attractions in the Region.

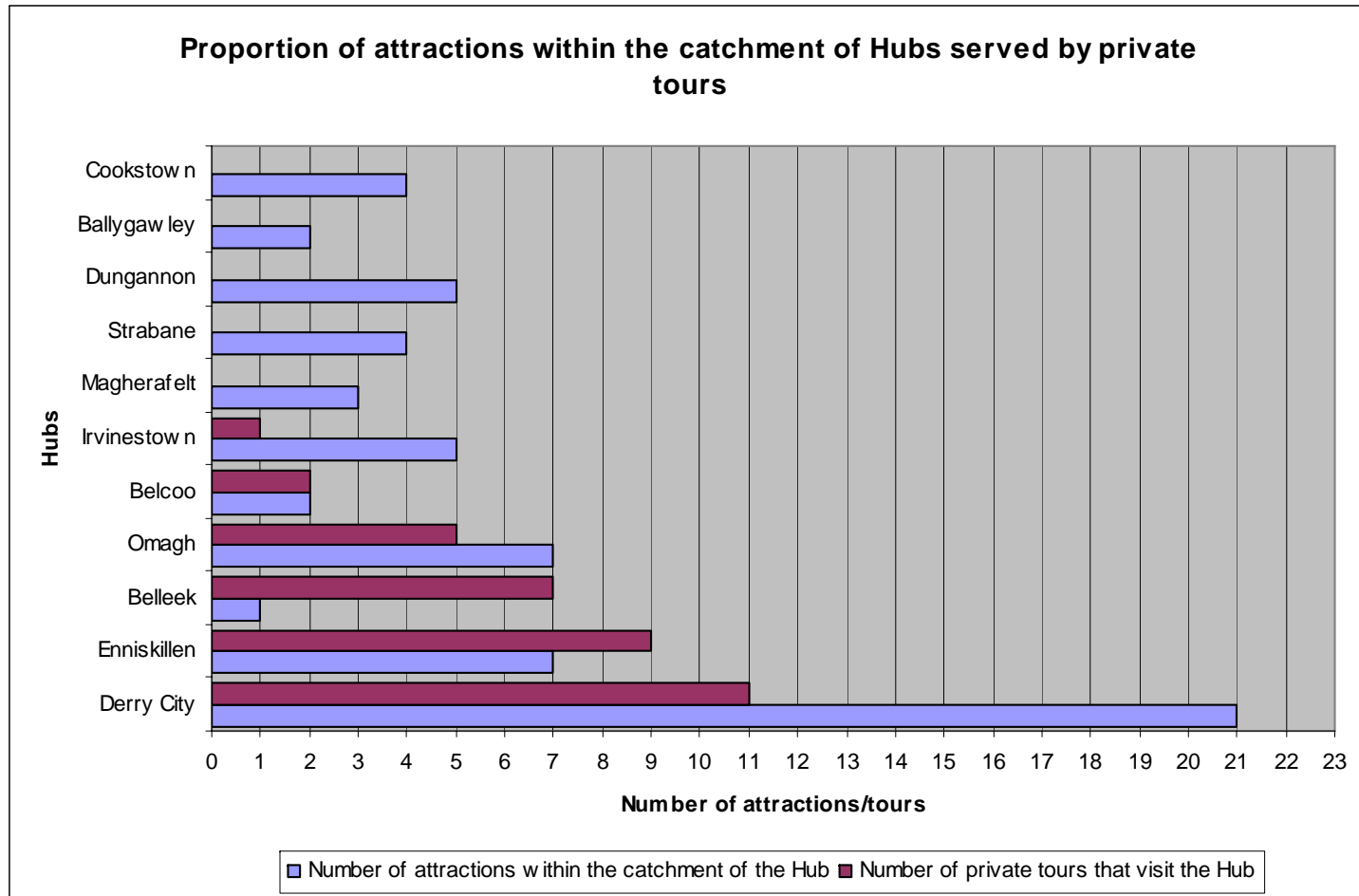


Figure 4.14: Proportion of Attractions within the catchment of an Hub served by private tours

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- 4.6.9 Dungannon, Ballygawley, Strabane, Magherafelt and Cookstown all have 2-5 attractions within their catchment. However, none of these Hubs are served by tours. In comparison Belleek only has 1 attraction but is served by 7 tours.
- 4.6.10 The following is a list of the few popular attractions in the Region that tours visit:
- Belleek Pottery
 - Castle Coole
 - Derry Walls
 - Enniskillen Castle
 - Fermanagh Lakelands
 - Florencecourt House
 - St Columbs Cathedral
 - Ulster American Folk Park
- 4.6.11 Very few other attractions are visited by tour buses bar the attractions mentioned above. A map of tour routes is shown in Figure 4.15.



Figure 4.15: Tour Routes in the Western Region

Airport Bus Services

- 4.6.12 Airport bus services which generally connect airports with the main cities or in this case the Gateways were examined as a possible mode of transport for visitors in the Western Region.
- 4.6.13 There are two main operators on the island of Ireland, as follows:
- Aircoach which connects Dublin Airport with the Greater Dublin Area and also with Belfast; and
 - The Airporter, which connects Derry City with Belfast City Airport and Belfast International Airport.
- 4.6.14 Of these two services the Airporter presents the most potential for integration into the tourism transport network. Currently, one route is available, as shown in Figure 4.16. The service runs twelve times in each direction on weekdays and makes seven journeys in each direction on both Saturday and Sunday.
- 4.6.15 There are also two potential new routes under revision, one of which connects a number of the designated Hubs in the Western Region with Derry City/ City of Derry Airport and Belfast International Airport. The route is shown in Figure 4.16, and includes connections with Strabane, Omagh, Ballygawley and Dungannon.
- 4.6.16 This represents significant potential for encouraging air passengers to access the Western Region through these Hubs, from which they can then access visitor attractions by local bus services.

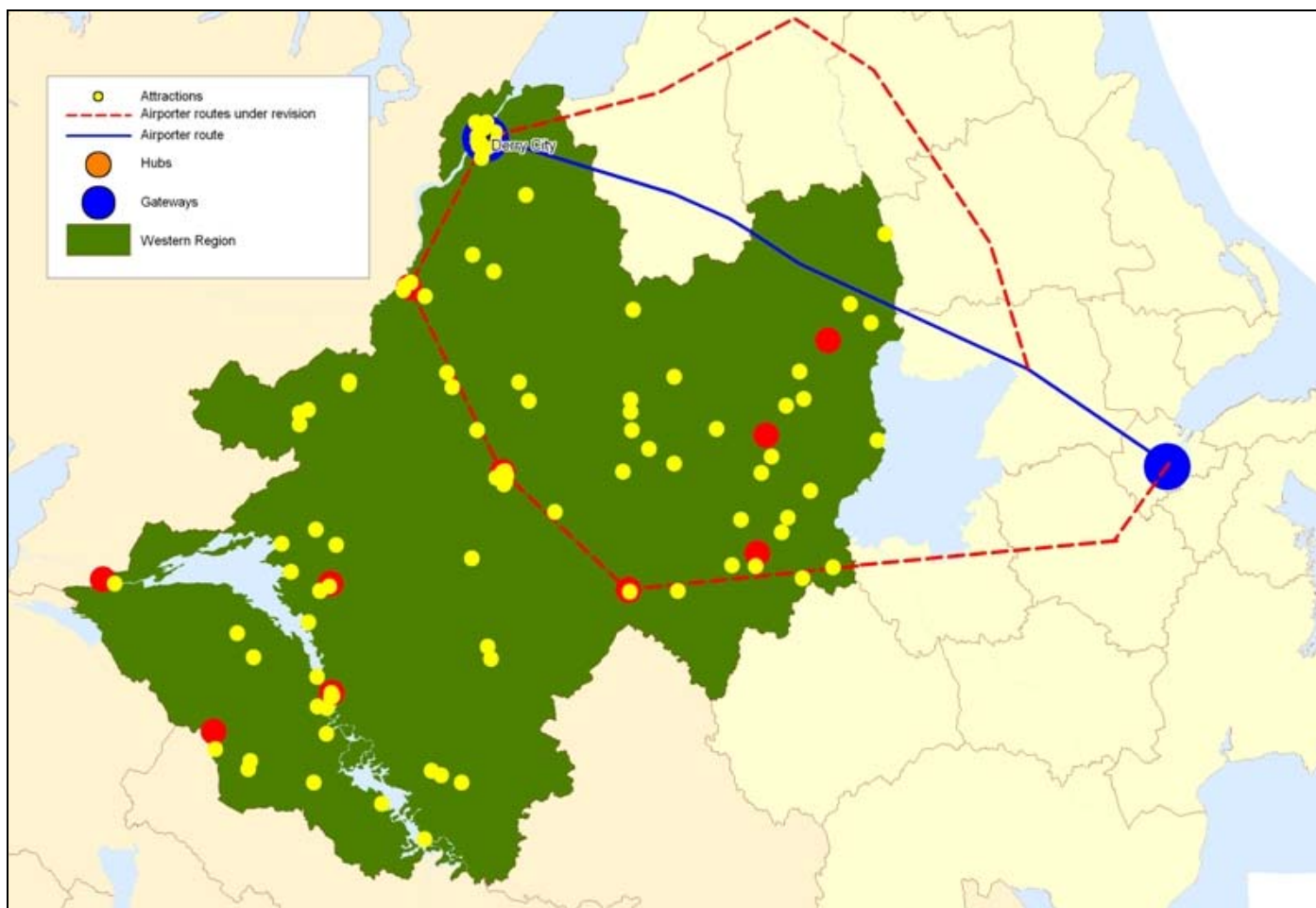


Figure 4.16: Airporter Routes

4.7 Summary

4.7.1 The first level of the 3-tier approach examined direct connections which showed that overall 36% of the attractions are currently served directly from Gateways.

4.7.2 The second step in the 3-tier approach dealt with connections from Gateways to Hubs. The audit found that compared to other Hubs Irvinestown, Belcoo, Magherafelt and Cookstown could be improved with regards to the provision of transport from Gateways, specifically direct connections.

4.7.3 The third level in the 3-tier approach examined connections between Hubs and attractions. The audit found that over 45% of the attractions in the Western Region can only be accessed by car/taxi from the nearest Hub.

4.7.4 The primary causes for concern regarding the private tour operators are;

- Less than one in five of the attractions in the Regions are served by tour buses.
- The majority of the tours that are available visit the following few attractions:
 - Belleek Pottery
 - Castle Coole
 - Derry Walls
 - Enniskillen Castle
 - Fermanagh Lakelands
 - Florencecourt House
 - St Columbs Cathedral
 - Ulster American Folk Park

4.7.5 Figure 4.17 is a graph that gives a visual representation of accessibility to visitor attractions.

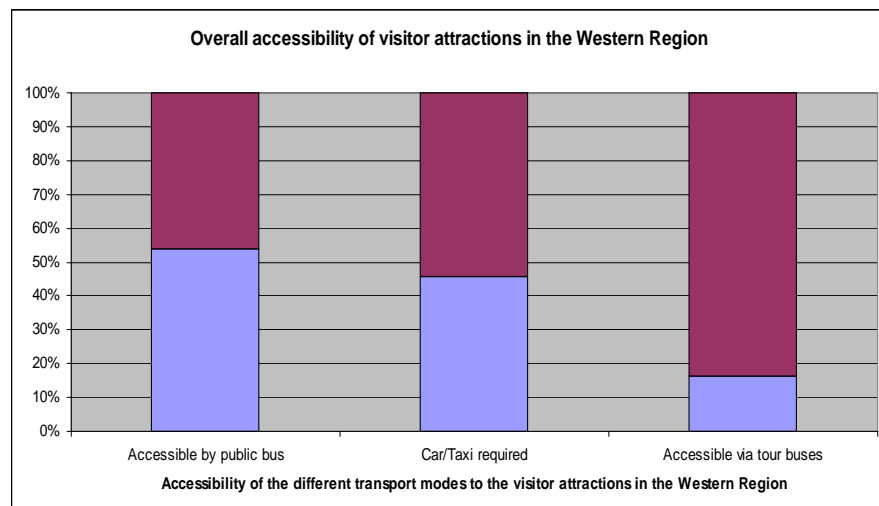


Figure 4.17: Accessibility of visitor attractions in the Western Region

5 Stakeholder Consultation

5.1 Overview

5.1.1 A total of 52 stakeholders were identified and agreed with the Western Region Tourism Partnership at the outset of the study. A letter was issued to each of the stakeholder consultees in early July 2008, outlining the aims and objectives of the study and providing some questions for the consultees to consider in advance of a telephone interview.

5.1.2 Telephone interviews were held during the last week of July 2008. All 52 consultees were contacted, with comments received from 28. The consultation process was held open throughout the study.

5.1.3 The questions put to the consultees were as follows:

- What transport-related services (if any) does your organisation currently provide (or plan to provide) for tourism in the Western Region?
- Which tourist attractions or activities do these services cater for?
- Have you experienced any barriers or obstacles to developing new services relating to tourism in the Western Region?
- How well does the existing transport network cater for existing visitor numbers. How well do you feel the existing system would cope with an increase in visitor numbers?
- If you are an existing tourism business how do you feel the existing transport network could be improved to better cater for your needs?
- Are you aware of good practice elsewhere? Are some of these ideas relevant to the western area? Have you any suggestions or innovative ideas?
- Would you be interested in participating in a trial - this may take the form of marketing / ticketing initiatives or altering existing transport services?
- If you operate an existing tour operator which does not operate a service within the Western Region why is this the case and what would make you consider operating a service within the area?

5.1.4 The following sections presents a summary of the responses received, by category of respondent.

5.2 Transport Providers

5.2.1 This category refers to private tour operators, public transport providers and other private operators such as the Derry City Airporter bus service.

Public Transport Operators

5.2.2 Consultation was undertaken with both rail (NIR) and bus (Translink) in Northern Ireland on tourism transport provision. The Regional managers within the Western Region were contacted by letter and telephone to discuss the provision of transport services for tourism, including perceived barriers and opportunities.

- 5.2.3 The railway network is presently limited to routes connecting Belfast and Derry City via north County Derry. However, these services mainly benefit the honey-pot destination of the Causeway and the walled city of Derry. Mr McGreevy, the general manager of NIR, noted during discussions that services south into Tyrone and Fermanagh were currently not economically viable, nor were they expected to become viable for the foreseeable future.
- 5.2.4 There was a consensus among the Regional managers of Translink that they currently provide a sufficient service insofar as meeting the current demand of existing visitors. However, there was also recognition that the current network of services does not cater for all attractions in the Region with routes mainly aimed at connecting regional towns. This is due to dispersed demand in rural areas which make it difficult to serve by public transport.
- 5.2.5 Interestingly, there was also a consensus among the regional managers that they perceived no barriers or obstacles to developing new services, despite the obvious difficulties of serving rural areas. This might suggest that further examination is needed in order to fully understand what developments are feasible based on best practice from the UK and internationally.
- 5.2.6 Discussions with Bus Éireann revealed that they operate a number of services which connect Dublin with the northwest, such as Dublin to Letterkenny via Tyrone and Derry. Rory Leahy, northwest regional manager, acknowledged that “more dialogue and a closer working relationship with tourism agencies is needed if bus services are to be fully integrated into the visitor management process”. This will be an important element of the strategy for the Western Region based on the evidence of best practice from other parts of the UK, as detailed in Section 4.
- 5.2.7 In general there would appear to be both capacity and a willingness among public transport operators to better utilise existing services to benefit tourism transport in the Western Region. This offers significant potential to capitalise on visitors entering Northern Ireland through the Gateway of Dublin wishing to explore the northwest.

Private Tour Operators

- 5.2.8 The consultation with private operators revealed a consensus of opinion on a number of matters relating to tourism transport in the Western Region. Most operators currently focus on the honey-pot destinations along the north coast and do not, as yet, cater to any significant extent for the Western Region. However, they all agree that the Western Region is a potential new market, with scope to develop new tours to serve attractions based there.
- 5.2.9 An interesting point raised by the private tour operators concerned the lack of integration between private and public transport services, particularly at stations but also in relation to marketing and ticketing. It was noted that significant improvements could be made to the overall

transport system if both operators could find ways of cooperating more closely.

5.2.10 There was also consensus among the private operators that marketing was a crucial element of the success of their services. It was noted that marketing needs to be targeted and effective and requires cooperation with, and the support of tourism agencies. In Section 4, the use and impact of marketing as a tool or measure for increasing access to tourist attractions is revealed.

5.2.11 In general the private operators expressed significant enthusiasm for developing services in the Western Region. However, it was clear that these operators feel that they need the support of key agencies, both tourism and public transport providers, to develop existing and new services.

5.3 Tourism

5.3.1 All of the tourist information centres operating in the Western Region were contacted regarding the issue of tourism transport. Several centres provided quite detailed feedback on this issue such as the level of 'disappointment' at the current provision of transport services for tourism.

5.3.2 There was a consensus of opinion that the NITB were too focused on 'signature' projects, at the expense of smaller regional attractions. The impact of which contributes towards a lack of travel options for visitors or dependence on car use. It was noted that many, if not most tourists, used public transport as their principle means of transport as car hire was often relatively expensive. The result of which means that attractions which are not easily or at all accessible by bus or rail, or located within a town, are over looked. There was a general feeling amongst the tourist information centres that visitors would have to be "very determined or resourceful if they wanted to see what the Western Region had to offer".

5.3.3 Most centres had similar concerns that the overall quality and coverage of the existing transport network is not "up to standard" nor able to support visitor demand. The limited rail network in Northern Ireland was highlighted as was the "limited coverage of bus services" through the Western Region. This view contrasted starkly with that of the public transport operators who felt that their services were currently adequate for visitor demand. The 'Sperrin Rambler' service was highlighted as an example of bad practice. This is indeed surprising as this Translink service is designed to improve access to visitor attractions

*"Translink operate a number of services to promote tourism in rural areas. The 'Access by Bus to the Countryside' scheme supported by the Rural Transport Fund includes the Antrim Coaster (Service No 252), the Kilkeel Rambler (service No 407) and the **Sperrin Rambler (Service No 403)** which run all year and the Causeway Rambler (Service No 402), the Mourne Rambler (Service No 405), the South Down Rambler (Service No 408) and the Lecale Rambler (Service No 406) which are seasonal. These services are ideal for tourists and locals alike who want*

to explore some of Northern Ireland's most spectacular scenic areas by foot. Rambler services set down and pick up at key locations in these Regions as well as conveying passengers to main bus stations."

Extract from www.translink.co.uk

- 5.3.4 It was noted "...primarily due to poor integration and timing of buses the making of connections can at times be impossible". Consultees praised services such as the Sperrin Rambler but suggested that only proper integration throughout the network would yield the best possible utilisation and benefit for visitors.
- 5.3.5 It was revealed that previously Ulsterbus operated a 'Gortin Rambler' service which included stops at Gortin Glen Forest Park, the villages of Gortin, Killymore and Newtownstewart, and the Ulster American Folk Park before returning to Omagh. However, it was suggested that this service was discontinued due to funding issues. Discussions with Translink suggested that the service was poorly utilised and therefore not viable.
- 5.3.6 Consultees also highlighted the lack of set-down facilities for coaches in both towns and, in some cases, at the attractions themselves. This has obvious impacts on the attractiveness of these destinations for private tour operators.
- 5.3.7 Consultees provided some interesting feedback on possible measures which could be examined in more detail. It was suggested that better coordination between the 'flagship' attractions and smaller more Regional attractions could benefit everyone and provide the necessary economies of scale to run viable transport services for visitors.
- 5.3.8 It was also suggested the most accessible form of transport to visitor attractions in the Western Region (Magherafelt area) was school bus services, which had previously accommodated visitors in the area.

Outside Northern Ireland

- 5.3.9 A number of consultees were included from outside Northern Ireland, including local authorities, tourism agencies and attraction operators. The focus of this element of the consultation process was to highlight possible measures to implement in the Western Region.
- 5.3.10 David Browne of the *Transport Division of Stirling Council* in Scotland, provided some information on transport services in rural areas based on dispersed populations. He noted that as population density decreased so it became more difficult to provide high frequency services on fixed timetables. In these circumstances he suggested that Demand Responsive Transport (DRT)¹¹ would be more suitable. Examples of DRT are discussed in more detail in section 4 on best practice.
- 5.3.11 John Lloyd, *Chairman of Attractions of Snowdonia*, suggested that joint or integrated marketing initiatives run between attractions had proved successful in attracting more visitors in their region. It was previously

¹¹ Demand Responsive Transport (DRT) systems provide a public transport service in rural areas or areas of low passenger demand, where a regular bus service may not be as viable.

noted, that better cooperation between major attractions and smaller ones in a region could be mutually beneficial. Such joint ventures can enable or facilitate joint arrangements for transport services which have better economies of scale.

5.3.12 Katherine Webster, *Director of Cliffs of Moher*, also noted the importance of marketing and cooperation among tourism agencies. Indeed, she highlighted the necessity of utilising tourism agency marketing initiatives by visitor attractions as they enjoyed a much greater geographical exposure.

5.4 SWOT Analysis

5.4.1 The consultation process has provided useful information in terms of the issues, barriers and opportunities for tourism transport in the Western Region. In order to summarise the findings of the consultation exercise a SWOT¹² analysis has been prepared based on the comments provided by the consultees.

¹² Strengths Weaknesses, Opportunities, Threats

Table 5.1: Tourism Transport - SWOT

Strengths	Weaknesses
<ul style="list-style-type: none"> ▪ Rail connection between Derry City and Belfast ▪ Derry City Airport ▪ Belleek Rural Rover Service ▪ Sperrin Rambler Service ▪ Strong network of Hubs ▪ Inter-urban bus services from Dublin to Donegal travel through the Western Region ▪ Strong presence of national cycle network ▪ Well established bus connections with Gateways ▪ Well established local bus services ▪ Translink's 'Freedom of Northern Ireland' ticket 	<ul style="list-style-type: none"> ▪ Sparsely populated making it difficult to serve by public transport ▪ Lack of integration between public and private bus services ▪ Lack of integration between larger attractions and smaller ones ▪ Limited coverage of the rail network ▪ Poor provision of public transport excluding visitors with a car ▪ Lack of timetable integration between conventional bus services and rambler bus services ▪ Limited provision of coach set down areas in towns and at some attractions ▪ Limited coach parking facilities and lay bys ▪ Lack of funding and private sector investment ▪ Absence of a national strategy for dispersal of visitors to regional attractions
Opportunities	Threats
<ul style="list-style-type: none"> ▪ Willingness among all stakeholder to develop existing and create new services ▪ Better utilising school transport services ▪ Fostering relationships between visitor attractions clustered around major attractions ▪ Public transport routes between Dublin (RoI) and the northwest of Ireland/NI ▪ Alter timetable of bus services between Belfast and Magherafelt to arrive 15min as opposed to 5min before the departure of the Sperrin Rambler service ▪ More facilitation of cyclists on public transport services 	<ul style="list-style-type: none"> ▪ Lack of funding for 'Rambler' services ▪ Focus by NITB on 'honey-pot' destinations or 'signature' projects ▪ Absence of coordinated information on travel and attractions in the Western Region ▪ Implications of route improvements - such as for example the A5 corridor- for town centre destinations bypassed by Express Services as a result. ▪ Over reliance on access by car

▪ Reintroduce the Gortin Rambler service	
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- 5.4.2 The SWOT analysis suggests that whilst there are some fundamental weaknesses in the Western Region in terms of improving access to visitor attractions by sustainable means, such as the sparse distribution of population, there remains many significant strengths and opportunities. Key among these are the Translink operated Rural Rover and Rambler services. Both are designed to be more flexible than conventional public transport and both offer much towards a tourism transport network.
- 5.4.3 Translink's operations offer a significant opportunity as they are well established at both regional and local level. Visitors can take advantage of the *Freedom of Northern Ireland* ticket to travel around the country on all forms of public transport. However, it would appear that expansion of the current network is limited by the sparse population of rural areas.
- 5.4.4 Going forward there is a strong indication that more can be done with the existing provision, which can then be supplemented by the less conventional services e.g. the rambler services, and privately operated tour coaches.

6 Preliminary Strategy

6.1 Overview

6.1.1 The outline strategy comprises a number of recommendations which aim to improve access to the Western Region through both public and private transport. The strategy has been developed on the basis that in the first instance maximum use is made of existing resources i.e. current public transport and tour coach operations to and within the Western Region.

6.1.2 The next stage of the strategy is to 'infill' the existing provision with more bespoke transport services i.e. to accommodate visitor attraction which cannot be served by conventional transport operations.

6.1.3 The following chapter sets out the preliminary strategy as follows:

- Aims and Objectives
- Understanding the visitor's journey
- Maximising existing public transport services
- Promoting cycle tourism
- Enhancing tour coach activity
- Innovative transport solutions
- Marketing and Information
- Implementation

6.2 Aims and Objectives

6.2.1 The Visitor Management Strategy ultimately aims to improve access to visitor attractions to and within the Western Region. To achieve this aim a number of specific objectives must be accomplished, as follows:

1. Visitors must have access to the right information at all stages of their journey if they are overcome any anxiety or uncertainty about travelling to and/or within the Western Region;
2. As most journeys to and with the Western Region will entail some form of interchange between modes, it is important that these transitions are as smooth as possible i.e. as much as possible, trips involving several modes should be seamless;

6.2.2 To realise these objectives and the overall aim of the Visitor Management System, a number of actions/measures have been developed around marketing, information, and sustainable transport systems.

6.3 Mobility Management for Tourism

6.3.1 Visitor attractions generate a number of trips by various modes but mainly by car, particularly in the Western Region but also across Northern Ireland. Mobility Management is a concept that seeks to maximise access to a destination by sustainable forms of transport, through:

- The promotion and marketing of public transport, walking and cycling

- Car share and car club schemes
 - Improving provisions for and the facilitation of walking and cycling
 - Fiscal incentives to travel car free
 - Enhancing existing public transport networks
- 6.3.2 Mobility Management can be targeted at various levels including:
- City Mobility Management Strategies
 - Area wide schemes e.g. in an industrial zone
 - Single organisations e.g. a university or hospital
 - At a personal level through personalised travel planning or marketing
- 6.3.3 This involves assessing the existing conditions in terms of what level of provision is currently available for travelling by sustainable modes and what the current travel patterns are of the target audience. A Travel Plan is then produced which identifies where opportunities exist and proposes measures to turn them into tangible benefits, and ultimately to reduce dependence on the car for travel.
- 6.3.4 This process and the associated benefits can also be applied to tourism, as shown in Chapter 2 on Best Practice with the example of the Genova Valley in Italy. In effect, the Visitor Management System is also a form of Mobility Management Strategy for the Western Region. However, this can be taken one step further by developing Travel Plans for individual or clusters of visitor attractions within the Western Region.
- 6.3.5 This ‘micro’ level approach would be based on a more thorough examination of the origins of visitors to the attractions so that travel patterns could be assessed. This will enable a spatial analysis to be undertaken looking at how visitors actually travel between their origin and the attraction(s) i.e. their destination, and how they could travel i.e. by sustainable modes.
- 6.3.6 The individual or clusters/groups of attractions could then develop measures to improve access to their respective locations. It is therefore **recommended that visitor attractions consider developing Tourism Travel Plans**. As previously alluded to, it may not be feasible or practical for many of the attractions to develop individual travel plans but collectively, together with several attractions located within close proximity, it may be achievable.
- 6.3.7 The process of engaging in Tourism Travel Plans can foster new working relationships that enable the operators of visitor attractions to deal with their specific needs and unique circumstances. Importantly, Tourism Travel Plans can help all stakeholders work towards sustainable tourism by reducing the negative impact of generating car-based travel especially in areas of natural beauty.
- 6.4 Promoting Cycle Tourism
- 6.4.1 The following section sets out a number of interventions and proposals to maximise cycle tourism in the Western Region. A relatively good network of cycle routes are already well established as part of the National Cycle Network. The recommendations presented are intended

to improve access to these routes and the attractions which they serve by improving connections and linkages with Hubs.

6.5 What are the Main Types of Cycle Tourism?

6.5.1 **Cycling Holidays:** these are defined as holidays, by both domestic and overseas visitors, where cycling is the main purpose of the holiday. Participants are usually referred to as 'dedicated cyclists'. The holidays taken may be Long Cycling Holidays of four or more nights or more commonly Cycling Short Breaks of one to three nights. A distinction also needs to be made between Centre-based Cycling Holidays based on a single overnight location and Cycling Touring Holidays where the overnight stay changes. Cycling holidays can be either self-organised, or organised by a cycling holiday operator.

6.5.2 **Holiday Cycling:** this involves participating in cycling while on holiday and comprises day cycle rides taken by both domestic and overseas visitors while on holiday away from home. Cycling, in this instance, is one of a number of activities undertaken during the holiday.

6.5.3 **Cycling Day Visits:** these are defined as trips from home to places outside a person's usual place of residence. These trips may involve setting out from home by bike, or taking the bike by car, train or bus for a day- or half-day cycle ride.

Tourism Cyclists Needs

6.5.4 The key requirements for cycling tourists can be summarised as follows:

- Opportunities to visit local attractions and specific places of interest;
- Food, accommodation and refreshments available at intervals, which reflect comfortable distances for stopping off / overnight stops;
- Safe places to cycle and consideration from other road users;
- Attractive routes with good scenery;
- Well-connected and signposted routes and destinations avoiding long detours;
- Accessible maintenance, repair facilities and parking stands;
- Routes to be promoted on maps;
- Easy access to alternative cycle-friendly modes of transport;
- Website including route planner facility.

Key Recommendations

6.5.5 The key recommendations for improving access by cycling are as follows:

- Remove the restrictions on the carriage of bicycles on Rambler services
- Examine the potential for a 'bike bus' type scheme for the Sperrins or Lakelands in Fermanagh
- Provide cycle parking facilities at all bus and rail stations, and TICs

- Examine cycle hire provision at Hubs and at Visitor Attractions – the latter will enable visitors to cycle between attractions clustered in close proximity of each other

6.6 Developing Bus Routes to Access Attractions

6.6.1 A key proposal for the Visitor Management Strategy in the Western Region is to maximise access through existing public transport services. As noted, there is a well established network of routes both to the Western Region (from the Gateways) and locally from regional towns (Hubs). In order to examine the feasibility of this proposal a number of routes have been selected for examination.

6.6.2 The selection of routes has been based on enabling travel, by bus, from the Gateways through Hubs in the Western Region. This is intended to enable visitors to stay overnight in the Western Region and, if needed, to base themselves in the region. On this basis the following routes were selected:

1. Dublin - Ballygawley - Omagh - Strabane - Derry City – Belfast.
2. Dublin – Ballygawley – Omagh –Cookstown – Magherafelt – Belfast or Derry City.
3. Belfast – Dungannon – Ballygawley – Enniskillen – Belleek – Belcoo.

6.6.3 Journey information has been sourced from the Translink Journey Planner and is used to assess the routes in the following section. For the purposes of the study it has been assumed that visitors will be available of a *Freedom of Northern Ireland Ticket*, which comes in the form of 1 Day (£15), 3 out of 8 Day (£36) and 7 Day (£53) tickets, which enable unlimited travel on all scheduled bus and rail services within N. Ireland. The following section presents a review of each of the three designated routes.

Route 1: Belfast - Dungannon – Ballygawley – Enniskillen – Belleek – Belcoo (Return)

6.6.4 This route originates from the Gateway of Belfast and travels to County Fermanagh through County Tyrone (See Figure 6.1). The primary destination is the triangle of Enniskillen – Belleek – Belcoo. However, the route also enable visitors to take in the attractions located within the catchments of Dungannon and Ballygawley.

6.6.5 Table 6.1 presents a breakdown of the information associated with this route in terms of the journey and the attractions that are accessible from it.

Stage	Journey Time (Min)	Operator	Weekday Frequency	Weekend Frequency	Interchange		Attractions within walking Distance	
					Station	Waiting Time		
1	Belfast – Dungannon	60	Goldline Express	13	5	Dungannon Bus Station	Buses leave hourly between 08.00 – 20.00	No attractions within walking distance
2	Dungannon – Ballygawley	20	Goldline Express	14	5	Ballygawley, Grange Road	Buses leave hourly between 09.00 – 21.00	Suitor Gallery and coffee shop
3	Ballygawley – Enniskillen	55	Goldline Express	13	5	Enniskillen Bus Centre	Buses leave hourly between 09.25 – 21.25	Castle Coole, Clanart Art Gallery, Devenish Island Monastic Site, Enniskillen Castle and Fermanagh County Museum, Forthill Park, Pip sides photography
4	Enniskillen – Belleek	45	Goldline Express	4	4	Belleek PO	Minimum wait 75 min Maximum Wait 300 min.	Belleek Pottery
5	Belleek to Belcoo	35	Ulsterbus	3	1	Belcoo Village	Minimum Wait 20 min. Maximum Wait 430 min.	No attractions within walking distance
6	Belcoo – Enniskillen	35	Ulsterbus and Bus Eireann	10	3	Enniskillen Bus Centre	First service 08.05 Last service 19.50	Castle Coole, Clanart Art Gallery, Devenish Island Monastic Site, Enniskillen Castle and Fermanagh County Museum, Forthill Park, Pip sides photography
Total		250 minutes						8 attractions

Table 6.1: Bus Route 1 - Belfast - Dungannon – Ballygawley – Enniskillen – Belleek – Belcoo (Return)

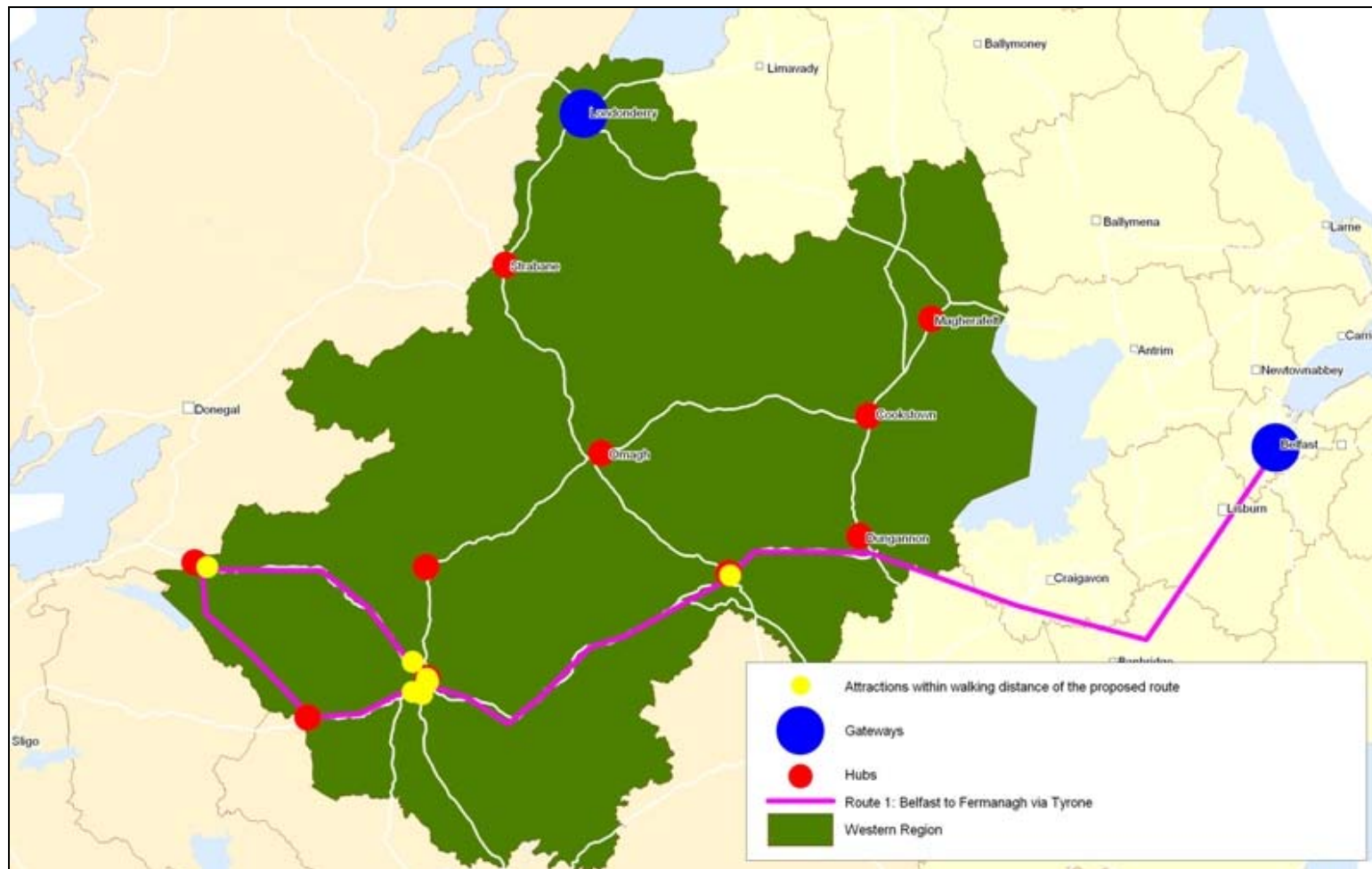


Figure 6.1: Proposed Route 1

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- 6.6.6 The total journey time for this route is approximately 250 minutes. However, it is expected that visitors might take in the route over a number of days with stopovers at some of the designated Hubs (although not necessarily). The route will encompass a minimum of 2 interchanges between buses and a maximum of 6, if the visitor wished to stop at each Hub and explore the area or visit attractions.
- 6.6.7 A total of 8 visitor attractions will be accessible on this route without any additional travel except for walking. The routes maintain a strong element of flexibility with visitors able to base themselves at a Hub and using local bus services, car hire or bicycle, to explore the area or create their own onward journey.

Route 2: Dublin - Ballygawley - Omagh - Strabane - Derry City – Belfast

- 6.6.8 This route originates from the Gateway of Dublin and travels to Derry City and then across to Belfast (See Figure 6.2). The primary destination is Derry City. However, the route also enables visitors to take in the attractions located within the catchments of Ballygawley, Omagh and Strabane.
- 6.6.9 Table 6.2 presents a breakdown of the information associated with this route in terms of the journey and the attractions that are accessible from it.

Stage		Journey Time (Min)	Operator	Weekday Frequency	Weekend Frequency	Interchange		Attractions within walking Distance
						Station	Waiting Time	
1	Dublin – Ballygawley	150	Goldline Express and Bus Éireann	11	6	Ballygawley, Grange Road	Maximum Wait 180 min Minimum Wait 45 Min.	Suitor Gallery and coffee shop
2	Ballygawley - Omagh	30	Goldline Express and Bus Éireann	14	5	Omagh Bus Centre	Buses leave hourly between 09.00 – 21.00	Aladdins Kingdom Play centre, House of Fun, Mr. Tumbles Fun House, Omagh Court House, The Cenotaph, The Memorial Garden, Ulster American Folk Park
3	Omagh - Strabane	30	Goldline Express and Bus Éireann	13	5	Strabane Bus Centre	Buses leave hourly between 09.25 – 21.25	Gray's Printing Press, Let the Dance begin Sculpture, the Alley Arts & Conference Centre, Ambrose the Pig (Sculpture)
4	Strabane – Derry City	30	Goldline Express and Bus Éireann	17	9	Derry Foyle St Bus Centre	Maximum Wait: 180 Min. Minimum Wait 45 Min.	Amelia Earhart Centre, Ballyarnett County Park, Ballygroll Prehistoric Complex, Derry Walls, First Derry Presbyterian Church, Genealogy Centre, Harbour Museum, Heritage Tower, Long Tower Church, Museum of Free Derry, Prehen Wood, Saint Augustine's Church, Seat of Power visitor centre, St Columb's Cathedral, The Bogside Artists, The Guildhall, The Verbal Arts Centre, The Diamond, Tower Museum, Workhouse Museum
5	Derry City - Belfast	100	Northern Ireland Railways and Goldline Express	41	22	Belfast (Europa Bus centre)	Maximum Wait 1 hour.	No attractions within walking distance
Total		340 minutes						31 attractions

Table 6.2 Bus Route 2: Dublin – Ballygawley – Omagh – Strabane – Derry City – Belfast

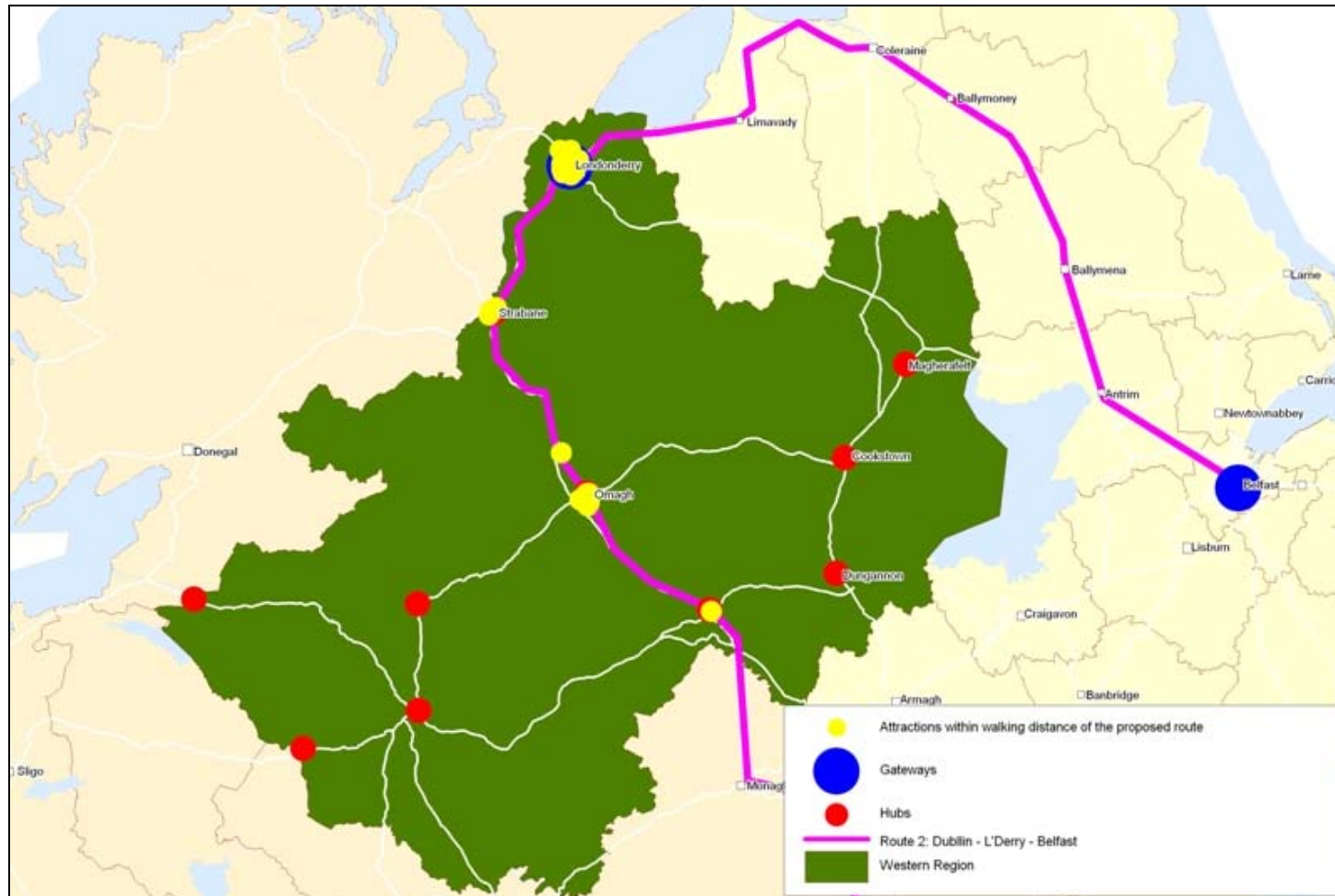


Figure 6.2: Proposed Route 2

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- 6.6.10 The total journey time for this route is approximately 340 minutes. The route will have a minimum of 2 interchanges and if the visitor wished to stop at each Hub he/she would visit a maximum of 5 Hubs.
- 6.6.11 A total of 31 visitor attractions will be accessible on this route without any additional travel, with walking as the exception.

Route 3: Dublin – Ballygawley – Omagh – Cookstown – Magherafelt – Belfast/Derry City

- 6.6.12 This route originates from the Gateway of Dublin and travels to Derry City or Belfast via Magherafelt (See Figure 6.3). The route also enables visitors to take in the attractions located within the catchments of Ballygawley, Omagh and Cookstown.
- 6.6.13 Table 6.3 presents a breakdown of the information associated with this route in terms of the journey and the attractions that are accessible from it.

Stage		Journey Time (Min)	Operator	Weekday Frequency	Weekend Frequency	Interchange		Attractions within walking Distance
						Station	Waiting Time	
1	Dublin – Ballygawley	150	Goldline Express and Bus Éireann	11	6	Ballygawley, Grange Road	Maximum Wait 180 min Minimum Wait 45 Min.	Suitor Gallery and coffee shop
2	Ballygawley - Omagh	30	Ulsterbus	14	5	Omagh Bus Centre	Buses leave hourly between 09.00 – 21.00	Aladdins Kingdom Play centre, House of Fun, Mr. Tumbles Fun House, Omagh Court House, The Cenotaph, The Memorial Garden, Ulster American Folk Park
3	Omagh - Cookstown	30	Goldline Express and Bus Éireann	2	0	Cookstown Bus Centre	Runs twice on Mon – Fri only at 07.40 and 15.45	Wellbrook Beetling Mill
4	Cookstown - Magherafelt	30	Goldline Express and Bus Éireann	9	3	Magherafelt Bus Centre	Maximum Wait: 180 Min. Minimum Wait 45 Min.	No attractions within walking distance
5	Magherafelt – Derry City / Belfast	50 to Belfast 50 to Derry	Northern Ireland Railways and Goldline Express	32	14	Derry Foyle St Bus Centre	Maximum Wait 1 hour.	Amelia Earhart Centre, Ballyarnett County Park, Ballygroll Prehistoric Complex, Derry Walls, First Derry Presbyterian Church, Genealogy Centre, Harbour Museum, Heritage Tower, Long Tower Church, Museum of Free Derry, Prehen Wood, Saint Augustine's Church, Seat of Power visitor centre, St Columb's Cathedral, The Bogside Artists, The Guildhall, The Verbal Arts Centre, The Diamond, Tower Museum, Workhouse Museum
Total		290 minutes						29 attractions

Table 6.3 Bus Route 3: Dublin – Ballygawley – Omagh – Cookstown – Magherafelt – Derry City/Belfast

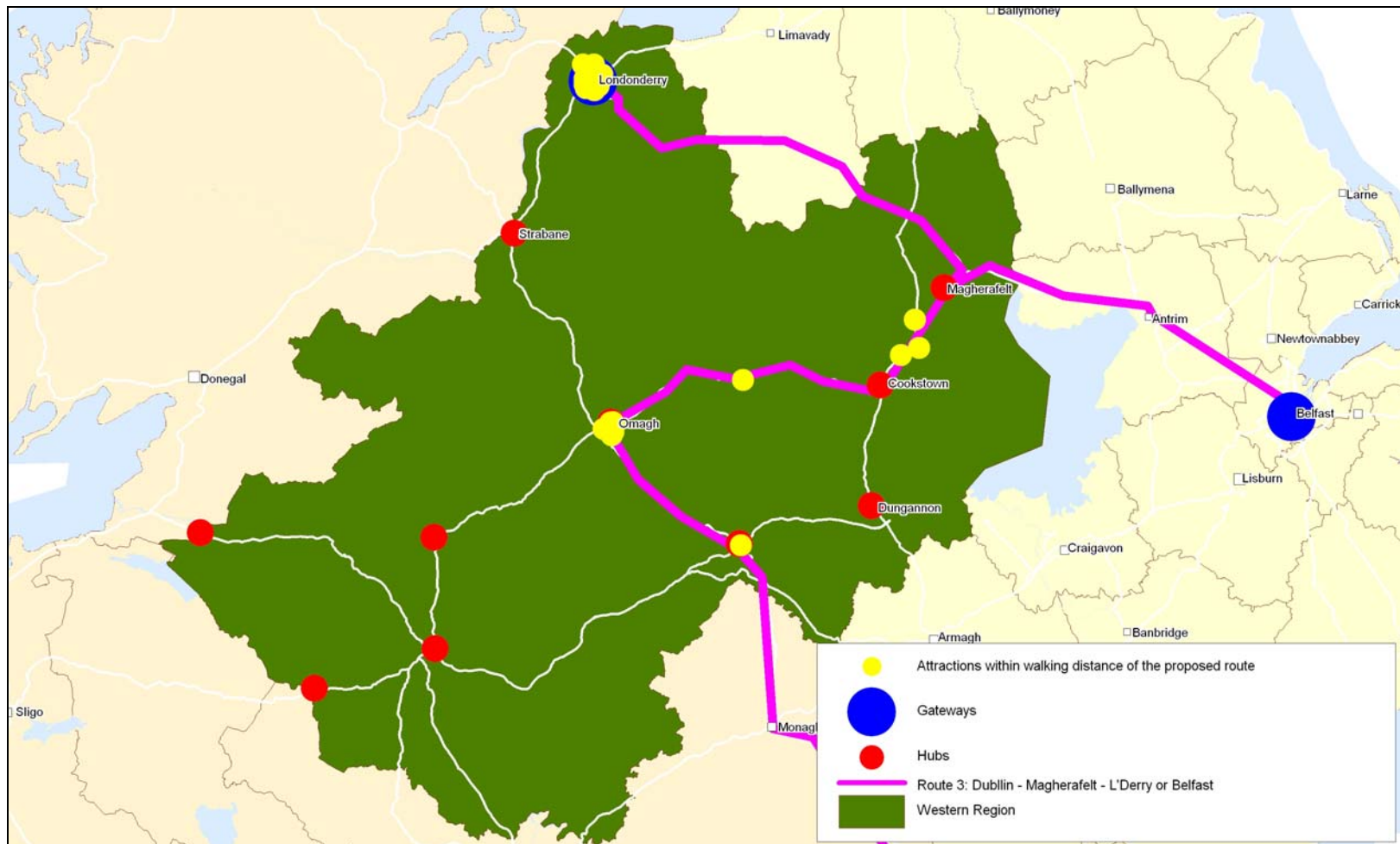


Figure 6.3: Proposed Route 3

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- 6.6.14 It is important to note that in order to travel to Belfast/Derry City from Magherafelt, a bus connection to Castledawson is required. Ulsterbus connections between Castledawson and Magherafelt are available every 30 minutes and the journey takes 30 minutes.
- 6.6.15 The total journey time for this route is approximately 340 minutes. The route includes a minimum of 3 interchanges and if visitors wish to stop at each Hub he/she would visit a maximum of 5 Hubs on this route.
- 6.6.16 Without any additional travel apart from walking, a total of 29 visitor attractions are accessible on this route.
- 6.7 Coordinating Bus Services
- 6.7.1 The coordination of bus timetables will be a vital element of the proposed bus routes so that visitors can move seamlessly through the network. This will require discussion with Translink and would only be possible when routes have been finalised.
- 6.7.2 A key component of the coordination of bus services to enhance tourism travel will be better communication between region and local bus stations and TICs in the Western Region. Bus Stations will need to provide TICs with up-to-date timetables and information on services changes, especially cancellations. In addition TICs should provide local bus stations with up-to-date information on visitor attractions accessible by local bus services. TICs should also ensure that bus station staff are fully aware of closures and openings of visitor attractions in the area or on the routes.
- 6.8 Improving Facilities for Tour Coaches
- 6.8.1 The audit of existing tour coach operators in the Western Region revealed that currently there is a relatively small number of tour operator activity. The consultation exercise revealed that there were limited facilities for coaches in terms of parking, particularly in towns but also at the attractions themselves.
- 6.8.2 Drawing on the example of best practice in operation at the Cliffs of Moher it is proposed that discounted parking is offered to tour buses/coaches to encourage more tours to enter the Western Region.
- 6.8.3 Implementation of such scheme will require both designated Hubs and visitor attractions to cooperate and provide the required facilities i.e. appropriate parking and lay-by facilities. One possible solution for Hubs would be the use of parking at existing bus stations or agreements with local hotels.
- 6.8.4 The level of discount is expected to be agreed between the visitor attractions and the tour operators.
- 6.9 Rural Transport Schemes
- 6.9.1 It is recommended that the Gortin Rambler service should be explored once more albeit in an integrated approach that would involve all the stakeholders i.e. Translink, visitor attractions and tourism agencies.
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- 6.9.2 The rambler route would provide a valuable service in the overall tourism transport network in the Western Region as it enable travel from the Hub of Omagh and incorporates most the key visitor attractions in the area. The service complements local and regional services but is more targeted at visitors.
- 6.9.3 An additional proposal worth consideration is to outsource the route to a private operator who could then run the service as a private enterprise. Combining travel and entry costs could prove more attractive to visitors and make the service more economical.
- 6.9.4 Services should be coordinated with conventional bus services to provide visitors with a more integrated network. Furthermore, whether Translink operated or outsourced, it would be very beneficial to have the service covered by the *Freedom of Northern Ireland* ticket.
- 6.10 “Sustainable Tourism Travel in the Western Region” Guide
- 6.10.1 A “Sustainable Tourism Travel in the Western Region” guide is proposed as an all-in-one guide for visitors wishing to travel to and within the region without having to hire a car. The guide is intended to promote sustainable travel and therefore sustainable tourism.
- 6.10.2 It is envisaged that the guide would comprise details on three key areas, as follows:
- Travel by public transport, walking and cycling
 - Visitor Attractions
 - Accommodation
- Travel by Public Transport, Walking & Cycling***
- 6.10.3 It is envisaged that the guide would include a number of suggested routes based on the format discussed in 6.5. This would include detailed timetables, ticketing and other relevant journey information, including details of interchanges.
- 6.10.4 The guide would also include Rambler and Rural Rover services, and airport connection services.
- 6.10.5 Visitor attractions which are accessible from the designated Hubs could be illustrated in terms of walking distances and routes.
- 6.10.6 The National Cycle Network routes could be incorporated including details of travelling with bicycles, bicycle hire at Hubs, bicycle repair centres and other related facilities and services.
- Visitor Attractions***
- 6.10.7 The guide would include information on visitor attractions and emphasis those accessible by sustainable means. However, direction would also be provided on accessing attractions which are not currently easily accessible by bus.
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Accommodation

- 6.10.8 In order to facilitate visitors who may wish to base themselves at one of the designated Hubs and explore the area from there, information on accommodation would be included. Following the theme of sustainable travel directions and information would be provided for travel to the listed accommodation, which could include local taxi services.
- 6.11 Integrated Ticketing
- 6.11.1 Northern Ireland benefits from the *Freedom of Northern Ireland* ticket available from Translink which enables travel on all services across the network, including rail services.
- 6.11.2 It is proposed that combining this ticket to include discounted access to visitor attractions is explored across the Western Region. This type of scheme has proved successful in Wales which is known as the *Freedom of Wales* ticket. The discount could be given on presentation of the ticket
- 6.12 Monitoring
- 6.12.1 The key component of the proposed strategy is the development of bus-based routes within the Western Region. It is proposed to complement these routes by promoting the use of the *Freedom of Northern Ireland* ticket and a sustainable travel guide for the Western Region.
- 6.12.2 On this basis monitoring would be best done at the visitor attractions where entry gained through the use of the combined ticket could be monitored. It is envisaged that the ticket would also remain valid for normal travel and would therefore be more difficult for Translink to monitor who was a visitor and who was using the ticket for normal travel purposes.
- 6.12.3 It is also worth noting that Translink have introduced a *Smartcard* which enables passengers to store credit on a card electronically rather than carry cash. If this was extended to the *Freedom of Northern Ireland* ticket then it would be relatively easy to determine the activity of visitors.
- 6.12.4 Visitor attractions would need to use scanning equipment to read the smartcards and this would obviously come at a cost. However, if such a ticketing scheme was put in place it could be extended to hotels and cafes/restaurants.
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7 Conclusions and Recommendations

7.1 Conclusions

7.1.1 The study has shown that there are obvious difficulties in accessing the Western Region by sustainable modes of transport alone. The main barriers include:

- The lack of direct bus routes from Hubs and Gateways to attractions
- Poor rail network coverage
- The number of interchanges, mainly between bus, to reach certain destinations
- Absence of a travel guide for the Western Region

7.1.2 It is also important to note that where more flexible and visitor focused services were provided i.e. the Gortin Rambler, demand was limited. However, it was not possible to ascertain if demand could've been enhanced by a different approach to marketing.

7.1.3 Indeed, the use of public transport alone would most likely hinder visitors if they wanted to spend significant time within the Western Region.

7.1.4 The audit of existing transport provision did however suggest that there is considerable scope to do more with the current bus and rail network. A number of possible routes have been identified which operate between Gateways and Hubs and provide access to a number of attractions.

7.1.5 Maximising the existing public transport provision and supplementing it with more flexible or less conventional forms of transport such as the *demand responsive transport* and *rambler services* offers the best opportunity to develop a visitor management system which is based on sustainable tourism travel. To make this a reality will require cooperation with Translink and private tour operators, and the various partners of the Western Region.

7.2 Recommendations

7.2.1 The following recommendations are based on the findings of this study:

- NITB should engage with the Regional Tourism Partnerships to
 - Investigate how to disperse visitors from the 'honey pot' destinations in Northern Ireland into the Western Region
 - Ensure that the Signature Destinations are linked into the wider visitor offer available within the study area
 - Ensure that Signature Destination initiatives such as route signing (e.g. The Causeway Coastal Route) link into the Sperrins routes
 - Lead the debate at 'national' level on the transport aspects of visitor movement, circulation, servicing and management by bringing together the relevant stakeholders to promote integrated thinking amongst those involved in the provision of transport and those involved in the business of tourism
 - Within the context of this debate encourage the provision of visitor friendly information; better coordination of timetables; creative

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- timetabling / provision of day tours to coincide with the promotion and hosting of events and festivals within the area; joint promotional material; route/attraction signage;
- Through the anticipated Innovation Fund for the development of tourism help the private sector to overcome the barriers to entry into different aspects of the business such as the mini bus tour market;
 - Focus on the needs of cycle tourism, in particular the provision of opportunities for cycle hire, repair and parking stands ideally linked to the network of TICs, tourist information points etc. within the visitor hubs;
- Developing bus-based routes through the Western Region should be examined in more detail in liaison with Translink and the visitor attractions.
 - Discussions should also take place between the visitor attractions and Translink to explore the potential to combine the cost of entry to attractions with the cost of travel in the *Freedom of Northern Ireland* ticket.
 - Visitor attractions should individually, or as a group (cluster), consider developing Tourism Travel Plans which focus on improving access by sustainable means on a more detailed and tailored level.
 - Discussion should also take place around the development of more flexible public transport services in rural areas which can serve local community and tourism needs. Such debate could include the utilisation of existing public transport fleets such as community transport schemes and school bus services.
 - Unconventional modes of transport throughout the region should be better utilised through, for example, encouraging local people out of their cars thereby creating a demand for community transport which will inevitably facilitate visitors wishing to explore the destination
 - In general, and in light of imperatives around the wise use of resources, develop a sensible, integrated and future proofed visitor transport policy that will be fit for purpose for the next twenty five years
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Appendix A: List of Attractions

Aladdin's Kingdom Play centre
Amelia Earhart Centre
An Creagan Visitor Centre
Ardboe Old Cross
Ballyarnett County Park
Ballygroll Prehistoric Complex
Barrontop Fun Farm
Beaghmore Stone Circles
Bellaghy Bawn
Belleek Pottery
Bodoney Church
Castle Archdale Country Park
Castle Balfour
Castle Coole
Castledawson Open Farm
Castledearg Castle
Castledearg Visitor Centre (subject to change of purpose)
Clanart Art Gallery
Coach & Carriage Museum
Creggan Country Park
Cregganconroe Court Tomb
Crom Estate
Cuilcagh Mountain Park
Derry Walls
Devenish Island Monastic Site
Donaghmore Heritage Centre
Drum Manor
Drumcairne Forest Park
Drumskinny stone circle
Dun Ruadh
Dungannon Park & Lake
Enniskillen Castle and Fermanagh County Museum
Erderney wishing well
First Derry Presbyterian Church
Fivemiletown Library
Florencecourt House and Gardens
Forthill Park
Gormleys Art Centre
Gortin Glen Forest Park
Grant Ancestral House
Gray's Printing Press
Harbour Museum
Harry Avery's Castle
Heritage Tower
House of Fun
Inis Rath Island Visitor Centre
Island Turf Crafts
Killeter Forest
Let the Dance begin Sculpture
Long Tower Church
Lough Navar Park
Loughash Wedge Tomb
Loughmacrory Wedge Tomb
Macnean Organic Garden
Magherakeel Monastic Site
Marble Arch Caves
Monea Castle
Moneymore Model Village
Mr Tumbles Fun House
Mullynascarthy caravan park
Museum of Free Derry
Ness Woods Country Park
Oakfire Paint
Omagh Court House
Orchard Acre Barn
Parkanaur Forest Park
Peatlands Country Park
Pip sides photography
Pomeroy Forest
Portglenone Forest
Prehen House
Prehen Wood
Riverwatch Visitor Centre & Aquarium
Saint Augustines Church
Seat of Power visitor centre
Sheelin Irish Lace Museum
Sliebh Beag Arts
Sperrin Mountains
Springhill House
St Colmcilles Bed, Chair and Holy well
St Columb's Cathedral
St Patricks Well and Maherakeel monastic site
Stewart Castle
Suitor Gallery and coffee shop
Tatty Keeran Gallery
The Argory
The Bogside Artists
The Cenotaph
The Clock Tower
The Diamond
The Guildhall
The Jungle
The Memorial Garden
The Verbal Arts Centre
Tower Museum
Tullahogue Fort
Tully Castle
Tyrone Crystal
Ulster American Folk Park
Wellbrook Beetling Mill
White Island Lough Erne
Wilson House
Workhouse Museum

Appendix B: Bibliography

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Appendix C: List of Consultees

Elaine Donaghy	Sperrins Tourism Ltd	Manager
Deirdre McKee	Sperrins Tourism Ltd	Manager
Charmain Bell	Magherafelt Tourist Information	Tourism Officer
Tanya Cathcart	Fermanagh Lakelands Tourism	Manager
Catherine O' Connor	Derry Visitor & Convention Bureau	Chief Executive
Karen Holouhan	Derry Visitor & Convention Bureau	Sales & Marketing Manager
Odhran Dunne	Derry Visitor & Convention Bureau	Visitor Services Manager
Dermot Harrigan	Derry City Council	Finance
Mary McGee	Flavour of Tyrone	Project Officer
Nigel Hill	Flavour of Tyrone	Tourism & Amenities Manager
Philip McShane	Strabane Tourist Information	Tourism Officer
Mary McKeown	Cookstown Tourist Information	Tourism Officer
Denise Campbell	Cookstown Tourist Information	Tourism Officer
George Bradshaw	Omagh Tourist Information	Tourism Officer
Martin Lundy	Translink	Regional Manager - Magherafelt + Antrim
Johnathan Miller	Translink	Regional Manager - Coleraine
Sean Falls	Translink	Regional Manager - Omagh + Enniskillen
Alan Young	Translink	Regional Manager - Derry
John Kidd	Translink	Regional Manager - Dungannon + Armagh
M.McGreevy	Northern Ireland Railways	General Manager
Hilton Parr	Northern Ireland Railways	Customer Services Manager
Richard Knox	Northern Ireland Railways	Operations Manager
Phillip Blair	Northern Ireland Railways	Route Manager
Ken McKnight	Northern Ireland Railways	Enterprise Manager
Frank Moore	Northern Ireland Railways	Northern Route Manager
General	Paddywagon Tours	N/A
Rory Leahy	Bus Eireann	Northwest Regional Manager
General	Authentic Travel Ireland	N/A
General	CIE Tours international	N/A
General	Cuilcagh tours	N/A
Phillip McGonagle	Irish Bus Hire	N/A
General	Kavanagh Travel	N/A
General	Max Travel Ireland	N/A
General	M.V. Kestrel	N/A
General	Open Top Tours	N/A
General	Shamrock Irish Adventures	N/A
Les Watson	Comhairle nan Eilean Siar	Transport Coordination Officer
David Brown	Stirling Council	Transport Division
Sharon Rice-Jones	Fife Council	Marketing Officer, Transportation Service
Kirsty Innes	Strathclyde, P.T.E.	N/A
Tom Brooke	Scottish Seabird Centre	Manager
Andy Ryland	Yorkshire Dales	Transport and Visitor Management Officer
David Rutherford	Penwith District Council	Sustainable Tourism Officer
Matt Price	Sustrans	National Director for Wales

John Lloyd	Attractions of Snowdonia	Chairman
Fergal Kearney	Northern Ireland Tourist Board	Senior Development Officer (Western Region)
Pamela Wilson	Northern Ireland Tourist Board	Research Manager
Stephen Bill	Northern Ireland Tourist Board	Visitor Services Officer
Collette Reynolds	Northern Ireland Tourist Board	Project Manager Western Region
Peter Kelly	Ulster American Folk Park	Head of Operations
Janice Gault	Northern Ireland Hotel Federation	Chief Executive
Katherine Webster	Cliffs of Moher New Visitor Experience	Director

Appendix D: Copy of Consultation Letter

Our Ref: 148451

Name
Title
Organisation
Address 1
Address 2
Address 3

D 028 90 234110

14 July 2008

Development of a Visitor Management System & Sustainable Transport Strategy for the Western Region

Dear [enter name]

Colin Buchanan have been appointed by the Western Regional Tourism Partnership to prepare a Visitor Management System and Sustainable Transport Strategy for the western region, covering Counties Tyrone, Fermanagh and Londonderry/Derry.

The purpose of this assignment is to carry out independent industry, market and consumer research into the current visitor management system(s) in the region and the existing provision of transport.

This study will then be used to develop the existing visitor management system(s) and create a number of trial transport services to enable the visitor management system in the Western region.

The assignment will be an important tool to encourage and enable a wider dispersal of visitors from the honey-pot destination throughout the region and to maximise the length of stay within the WRTP area. This will allow the tourism industry to capitalise on the sectors potential as a sustainable, long-term economic generator in the Region.

The programme reflects the growing recognition of the importance of tourism to the Western Region and the contribution that tourism makes to its economic and social prosperity.

The Study Area

The focus of the project will be the Western Regional Tourism Partnership area, defined as the three Counties of Londonderry/Derry, Fermanagh and Tyrone, taking in the seven local authority areas of Cookstown District Council, Derry City Council, Dungannon and South Tyrone District Council, Fermanagh District Council, Magherafelt District Council, Omagh District Council and Strabane District Council.

Consultation with Stakeholders

We are currently undertaking consultation with the key stakeholders directly or indirectly involved with the tourism industry in the Western region. Your organisation has been identified as one of the key stakeholders and we like to offer you the opportunity to have your say.

We have issued all stakeholders with this introductory letter with the intention of holding a short telephone conversation at a later date to discuss your issues.

In order to make this process as efficient as possible we have provided a list of issues which we would like to discuss with you and which you may be able to give some thought to in advance of our discussion. This will act as a starting point however we are happy for you to discuss other issues.

- What transport-related services (if any) does your organisation currently provide (or plan to provide) for tourism in the western region?
- Which tourist attractions or activities do these services cater for?
- Have you experienced any barriers or obstacles to developing new services relating to tourism in the western region?
- How well does the existing transport network cater for existing visitor numbers. How well do you feel the existing system would cope with an increase in visitor numbers?
- If you are an existing tourism business how do you feel the existing transport network could be improved to better cater for your needs?
- Are you aware of good practice elsewhere? Are some of these ideas relevant to the western area? Have you any suggestions or innovative ideas?
- Would you be interested in participating in a trial - this may take the form of marketing / ticketing initiatives or altering existing transport services?
- If you operate an existing tour operator which does not operate a service within the Western region why is this the case and what would make you consider operating a service within the area?

In the meantime, should you wish to contact us directly please do so at the contact details provided.

Yours sincerely

Peter Harper
Principal Planner

peter.harper@cbuchanan.co.uk