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SUSTAINABLE TOURISM DEVELOPMENT

SUSTAINABLE TRANSPORT FOR TOURISM WALES

Information Needs of Visitors Concerning the Use of Public Transport

Introduction

'We are not about to deny the benefits that the car brings. But neither can we dismiss the downside of car ownership – the traffic, the frustration, the agitation, the high level of pollution and the parking...'

So began a special This Week® Wales article entitled "A Better Alternative", which, eight years ago, sparked off a major marketing campaign to encourage visitors to use Wales' railways and bus services.

One of the measurable outputs from the campaign, which ran under the title "Sustainable Transport for Tourism Wales" (STTW), was the sale of over 18,000 tickets from the Freedom of Wales Flexi Pass range, with research showing that 42% of customers would not have visited Wales were it not for the tickets. Ticket sales alone attracted £300,000 of tourism revenue, and extra revenue of £580,000 was generated by almost 20,000 additional visitor trips to Wales. An important "process" output for the campaign was a partnership of 29 organisations responsible for the production and distribution of over 4.5m brochures, newspapers and site-specific leaflets, all of which contained information on public transport access.

The campaign demonstrated that public transport had a vitally important role to play in the development of Wales' tourism, but the traditional barriers remain. These include a lack of integration of the public transport system; a lack of co-ordinated, easily-accessible information; services that do not take account of visitors' needs; a general lack of user friendliness, and a failure to understand visitors' needs as distinct from those of local users.

Unravelling the Issues

Whilst public transport's role in reducing the environmental impact of the motor car was well understood long before the STTW campaign got underway, surprisingly-little attention had been given to the social and environmental impact on holiday destinations of high volumes of car-borne visitor traffic.

Holding back the tide of car-borne tourism, however, was never to become a viable option and the campaign concentrated instead on integrating public transport more fully into things to do whilst on holiday. Scenic railway trips and open-top bus tours, where the ride itself was the product, were straightforward in this respect and already part of the mix. It needed only a step up in promotion and more timely delivery of information to increase their usage. More challenging was the integration of scheduled network services, and it was recognised early on that simply producing more timetables and expecting visitors to help themselves was not a sensible way forward. It was a tough enough call for visitors without cars to have to do this, and it is here that the issues begin to unravel.

The Domestic Market for Public Transport

In the domestic market, public transport responds first and foremost to social needs where 28% of households (regional variations) are not car-owning and where a high percentage of the remaining population does not have 24/7 access to private transport. Public transport operators and local authorities respond to these needs by laying on scheduled services and giving out timetable information. Local

populations grow accustomed to these services, use them by habit, and depend on them for convenience. Regular car users will use the services only when forced to, at great inconvenience, or through choice when the convenience and cost factors (including car parking) outweigh those of using the car. The latter applies largely to commuting and long-haul business trips when car owners become habitual public transport users, dependent on the services provided.

This captive market is reflected by train and bus operators' budgets for promotion (£22.5m) driven by social needs, compared with those of car manufacturers (£480m) where lifestyle demand is high.

The Visitor Market for Public Transport

In the visitor market for public transport, the picture changes dramatically and becomes one that is wholly to do with lifestyle. Tourism is not a captive market for public transport operators. The number of public-transport-dependent travellers reduces drastically as visitors gain 24/7 access to family / friends' cars and embark on their journeys together. Released from work-related travel habits, motorists relish the freedom the car provides and are the least inclined to seek out information on public transport when they are away from home.

Meanwhile visitors on holiday without cars, though few in number, are even more deprived as they are forced to use services that are unfamiliar to them and where timetable information may not be readily available. This presents a very real social need but a difficult one to tackle. The transitory nature of visitors makes them notoriously difficult to target, let alone trying to reach a small minority with information that is likely to be inconsistent with their immediate needs.

Having said this, it is reasonable to assume that anyone planning to come on holiday without a car would want to avoid distress and would have the sense to obtain public transport information on their destination before leaving home. Bill Bryson's experience at Blaenau Ffestiniog – the bus he was travelling on arrived to schedule a minute after the departure of the train – could have been avoided had he planned in advance. It would be better therefore to target this relatively-small group at early-planning stages, rather than hope to reach them at destination, too late and full of missed opportunities.

Recent research has also shown that if multi-modal information is provided early on in the information supply chain to visitors planning a tour using public transport, it is likely to increase public transport usage, assist discovery, and lengthen stay as a result. Whilst this applies at present to an even-smaller minority of visitors, it has important implications for the future.

It also questions the role of Tourist Information Centres (TICs) and the emphasis hitherto on their importance as a resource for distributing public transport information.

Tourist Information Centres

The effectiveness of Tourist Information Centres from a consumer sense needs be put into perspective. Whilst it is considered politically incorrect to do, it doesn't help marketers not to know.

TICs, despite their name, only scratch the surface of information provision. Visit figures for TICs in Wales have hovered around 4m since 1993; actual visitor figures would be less. Meanwhile annual staying visitor trips to Wales numbered 11.6m in 2002 and day visits 47.9m when last surveyed in 1998. The total of 59.5 accounts for over 100m captive days spent in Wales by visitors, all available for information provision and product sales.

Where TICs do score, however, is on "distress visits". In the same way train passengers suffer "arrival stress" (Cole 2003) as they disembark hoping to find information needed, visitors arriving at their destinations in Wales will often suffer something similar, particularly first-time visitors. Ordinarily, these would be catered for immediately upon arrival by caring hospitality providers but if accommodation hasn't been booked in advance, it's a heart-in-mouth "distress visit" to the local TIC. TICs are also good for top-up information on the local area, particularly for day visitors who have no hospitality providers to cater for their needs.

So is this really the right market mix for public transport providers to target? Hardly. Yet under the Transport Act, local authorities will be able to require bus and rail companies to supply "reasonable" timetable information to TICs (Cole 2003) despite being unable to justify this in marketing terms. It's all part of the great TIC myth, so firmly embedded in the psyche that it would be going against nature to ignore them.

It may be that visitors without their own transport make up a larger percentage of visits to TICs than they do of visitors as a whole (15%) but this cannot be verified and it would be too near the end of the marketing supply chain to mean anything in any case.

The fact that a particularly informative “Wales Bus, Rail & Tourist Map and Guide” has been found by research to be rarely on display in TICs (Cole 2003) reflects not only the lack of demand but the muddle we're in. Shelf space is valuable in any consumer outlet and is made over to items in greatest demand. It is not there to create demand. The guide is attractive, relatively expensive to produce, yet free to consumer and when displayed suffers from the locust effect (frenzied information gathering). If hoarded, it suffers a lack of distribution to those that really need the information. There is a strong case here for retailing the guide at destination to ensure it falls into the right hands, and to use it more strategically to help create demand much further back down the information supply chain at trip-planning stage.

Information provided early on at trip-planning stage will also help generate a positive response to yield management marketing techniques, with visitors being able to see clearly the distinct price advantage of not leaving things to the last moment. An impression that the pricing structure e.g. of rail tickets “...puts tourists making last-minute plans and those not aware that tickets brought on the day are more expensive, at a significant price disadvantage.” (Cole 2003) detracts from the positive effects of yield management; EasyJet have demonstrated that by using the techniques well it has been possible to reduce the cost of air travel with many more people able to afford to fly.

The Way Forward

From the unravelling process above it is reasonable to assume that by serving up local public transport information to visitors at trip-planning stage in a content format more relevant to their needs (buses / trains to the beach and back, travel to and from notable visitor attractions and points of interest, circular tours on scenic railways / buses, etc), Wales might expect to become a more popular destination for non-car owners.

The idea of ‘productising’ public transport information in this way for specific markets is then key to accessing the much larger market of car-borne visitors who need simply to be shown how their holiday experience might be enhanced by using the products. A job here for marketers to sell the sizzle and certainly nothing to do with social needs and deprivation. Nevertheless, the knock-on benefits to local economies of increased use of public transport by visitors should not go unrecognised but it would be a mistake to let this become the main driver. The responsibility for marketing would almost certainly end up in the wrong hands, auguring against the central tenet of integration into the full tourism mix.

Integrated Marketing

The following bullet pointed items are proposed as touchstones in the development of a marketing approach founded on the four Is (Information+Interchange+Investment=Integration) for passenger transport identified by the English Tourism Council (Cole 2003), and based on the 4Ps of marketing (Riley 1995) plus ‘Passion’ i.e. enthusiasm for the job that needs to be done:

- Information; strategic
- Information; tactical pre-visit
- Information; tactical during-visit
- Integration
- Interchange
- Investment
- Inspiration

- Product
 - Personnel
 - Procedures
 - Physical environment
 - Perishability
 - Profitability
- Positioning
- Pricing
- Place

- Packaging
- Promotion
 - Photography
 - Publications
 - Public relations
- Passion

References

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