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INVESTIGATION OF TRAVEL BEHAVIOUR OF VISITORS TO SCOTLAND

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Scottish Executive Social Research
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EXECUTIVE SUMMARY

INTRODUCTION

1. Tourism in Scotland is both an important and extensive land use and a major contributor to Gross Domestic Product. In 2005, it is estimated that Scotland received around 10.5 million visitors from outside Scotland. Just over 76% of the visits originated in the rest of the United Kingdom, with the remainder having an international origin.

2. Tourism relies heavily on passenger transport both to access the destination, but also to travel around within it. However, there has been a lack of attention to the internal accessibility of Scotland from the visitor perspective. Whilst some attempts have been suggested and prioritised for facilitating tourists' travel around Scotland, such efforts are mainly undertaken by tourism organisations throughout Scotland, whose ultimate power to enable changes to transport systems is largely limited to lobbying. Moreover, without a clear picture of how accessible Scotland is internally as a destination, or of the transport demands of visitors in terms of internal accessibility, any measures taken to enhance visitor transportation remain largely uninformed. How tourists travel around Scotland, the extent to which they are reliant on public transport and the importance of existing transport provision in their travel behaviour and experience of the destination, including the areas they ultimately visit, merits further clarification. To this end, this study was commissioned by the Transport Department of The Scottish Executive to provide an overview of existing research into the travel behaviour of visitors to Scotland. The principal aim of the study was to review and collate existing sources of information on the use of transport by those visiting Scotland for leisure, recreation and business purposes. In conjunction with the objectives of the Scottish Executive, a thorough review of the literature and secondary data sources pertaining to the use of transport by visitors to Scotland for leisure, tourism and business purposes was conducted.

FACTORS AFFECTING VISITOR TRAVEL BEHAVIOUR

3. A review of the relevant academic literature on modal choice was undertaken and evaluated from the perspective of a visitor to a destination. Mode of transport is argued to be directly affected by personal, system and external factors, however personal and external factors also indirectly affect modal choice by means of their influence on perceptions of transport quality. Evidence from previous research suggests that there may be differences in the ways in which visitors, particularly those from overseas, and local residents evaluate public transport, both in terms of the performance attributes they use to measure quality and satisfaction and the degree of importance awarded to these attributes.

CURRENT PATTERNS OF VISITOR TRAVEL BEHAVIOUR WITHIN SCOTLAND

4. A framework is presented which reviews the scope and quality of the data sets and reports conducted at a national level (e.g. the United Kingdom Tourism Survey, the International Passenger Survey) or on specific routes into or within Scotland. It is clear that, whilst a great deal of reliable information is available on the origins and basic socio-economic characteristics of domestic and overseas visitors, port of entry (in relation to

overseas visitors), mode of travel to Scotland or the UK and visit purpose and length, little is known about the travel patterns of visitors within Scotland from these sources.

5. The data sets reviewed reveal that the majority of domestic visitors to Scotland from the rest of the UK arrive by car, although the proportion of those travelling by air and, to a lesser extent, by train, increases for those travelling from more remote origins in the UK. Air travel is the predominant mode of travel to the UK for overseas visitors to Scotland. Less than one fifth of overseas visitors to Scotland arrive in the UK using sea ports and the Channel Tunnel.

6. There is only limited data on mode of travel within Scotland. It is generally assumed that those arriving by car (domestic and overseas) will use their car within Scotland. This is no doubt true, but it is worth noting that a significant proportion of car users also report using some other form of transport during their stay in Scotland, as evidenced by the Rosyth to Zeebrugge Superfast Ferry study which found that 33% of respondents used a ferry or boat and 8% used the train and the Greater Glasgow and Clyde Valley Visitor Survey which showed a smaller number of respondents used a car during their visit to the study area in comparison with the number of respondents who used a car to travel to the area.

7. A large percentage of overseas visitors choose public transport to travel to the departure airport - 40% in the case of Prestwick airport which has its own dedicated railway station). This clearly demonstrates the important role played by the public transport system for this particular journey. Whether or not it is indicative of a more widespread use of public transport by overseas visitors during their stay in Scotland is not known.

8. There is evidence of a change in the visitor market having occurred in recent years with a rise in the number of overseas visitors and the time they spend in Scotland, accompanied, possibly, by a reduction in the size of the domestic market. This change has no doubt been driven, to a large extent, by the availability of low cost flights within Europe. The impact this may have on the travel behaviour of visitors in Scotland is worthy of consideration. Most obviously, this may result in an increase in the number of overseas visitors who do not, by and large, arrive with their own means of transportation and places more importance on the quality of transport service provision within Scotland.

9. Edinburgh and the Lothians is the most popular destination within Scotland followed by Greater Glasgow and the Clyde Valley and then the Highlands and Skye for both domestic and overseas visitors. Domestic and overseas visitors using Prestwick airport exhibit higher degrees of mobility and dispersal than visitors using other airports. Further analysis of the origin, socio-economic characteristics and trip purpose of visitors may offer some explanation of this phenomenon.

SCOPE AND LIMITATIONS OF TRANSPORT PROVISION FOR VISITORS TO SCOTLAND

10. A review of the scope and limitations of transport provision for visitors to Scotland from a supply and demand side perspective was undertaken. It has been identified that private transport is the predominant mode of transport used by visitors to Scotland. This applies not only to the private and hire car, but also to private coach tours. However, the recurring pattern that emerges from the available data is that the further away visitors come to

Scotland from, the less likely they are to use the car. Visitors from North America (Scotland's main overseas market) are the possible exception to this, but there is insufficient data to substantiate this claim.

11. The data reviewed indicates the presence of small, but nonetheless significant markets for public transport amongst visitors to Scotland. For example, in urban areas there is evidence of a substantial degree of use of public transport by visitors. Moreover, it is likely that the rise in the number of visitors travelling directly by air to Scotland from overseas, but also from the more distant regions of the UK as a result of the low cost carriers and the International Route Development Fund will result in a greater percentage of visitors being reliant on public transport during their stay. Moreover, there appears to be a small but significant market for rail travel which consists of a relatively high percentage of return visitors who prefer to travel by rail and would not make the journey by another mode. It is important that such markets are adequately catered for and the Freedom of Scotland pass appears to be satisfying a niche market in this respect. Furthermore, indications from the National Park data suggest that it is the visitors who stay longer that are most likely to use public transport. Since this type of traveller spends longer at the destination, they are likely to be higher spenders than day visitors who arrive and depart by car on the same day and spend little. The former type of tourist is thus to be favoured in terms of their environmentally and economic impact on the destination.

12. Some gaps in the existing transport provision are, however, apparent. As regards road transport, congestion in popular tourist areas, poor roads in some rural areas, a lack of parking facilities and poor signage have been identified as gaps in provision. In the latter case, policy on the signing of tourist attractions and facilities from main trunk roads perhaps requires reviewing with regard to permission but also financing. From the perspective of public transport, it is evident that many of the visitor attractions which are located in more rural areas, in particular the areas of natural beauty administered by Scottish Natural Heritage, but also some of the National Trust for Scotland sites, are accessed almost exclusively by private transport. An interesting phenomenon is suggested at some of these sites where the private coach appears to have replaced public transport as a means of access. What is not, however, clear is whether the desire to visit these attractions drives visitors to hire a car, or whether the sites are only visited by those who have made the decision to hire a car for other reasons. This is certainly worthy of further exploration.

13. Good practice should also be stressed. Particularly within the residential belt incorporating the cities of Glasgow and Edinburgh, there is evidence of longstanding and more recent initiatives which provide examples of transport and tourism operators working together to increase the number of visitors using public transport and visiting local attractions. Integrated ticketing is perhaps the most common example, but this is largely limited to one day tickets allowing visitors to a cluster of attractions in relatively close proximity to one another. The appeal of extending such schemes is worthy of further investigation. In addition, such schemes could be extended to cover a longer period and a more diffuse range of attractions.

VISITOR EXPERIENCE AND PERCEPTIONS OF TRANSPORT SUPPLY IN SCOTLAND

14. On average and across the studies reviewed there is no evidence to suggest that visitors from the UK and overseas, and those travelling for leisure purposes have lower levels of satisfaction than local transport users in Scotland. Indeed, the available evidence suggests that, although domestic visitors find it easiest to get around Scotland, they are the most likely to be dissatisfied with transport provision. There is also some evidence to suggest that leisure visitors are better satisfied with some public transport services than business travellers. Moreover, experiences of private transport appear in general to be more positive than those of public transport.

15. There is some evidence, particularly from the Visitor Attractions Monitor, to suggest that visitor attractions in Scotland regard transport to have a small but significant effect on visitor numbers and satisfaction. This effect is perceived to be more negative than positive.

CONCLUSIONS AND IMPLICATIONS

16. The following table summarises the main findings of this research in terms of what is currently known and what is not known about visitor travel behaviour in Scotland.

Summary of current state of knowledge of visitor travel behaviour

What do we know	What do we not know
How many visitors	How visitors travel around Scotland (other than travel to airports)
How they arrive in Scotland	What are visitor impressions of different modes of transport and how do these compare?
What regions they visit (but not in what order)	Are there any socio-economic and national differences in terms of mobility and dispersal around Scotland?
How they arrive at some attractions	Can we identify certain market segments/typologies in terms of their transport use/propensity to use particular modes?
How satisfied visitors are with some types of transport in some areas	How important particular attributes of the transport service/system are to visitors
Destination satisfaction is affected by transport.	No real detail on how transport affects destination satisfaction.

17. A number of recommendations are made to address weaknesses in the way data relating to visitor travel behaviour is collected, analysed and stored.

18. An overview of the existing policies of public agencies towards visitor travel covering, namely national government, enterprise companies and local authorities was undertaken. Where visitor travel and tourism are mentioned in policies, it is generally in the context of economic development generally and is associated with major infrastructure and service development where the visitor benefits are a relatively small element. However other areas commonly being identified include providing travel information targeted at visitors,

developing cycling routes, developing tickets for visitors, improving road signage. Overall, however, there are very few transport policy instruments that are targeted specifically at visitors. Whilst visitors undoubtedly benefit from the many general transport improvements being made, a bespoke approach for visitors may be required in certain aspects of transport provision.

19. Good policy requires a sound evidence base. This report has collected and collated the current state-of-knowledge on visitor travel behaviour in Scotland. It is clear that there are significant gaps in the evidence base and it would be sensible to address at least some of these gaps in order to produce better policy.

20. Some specific recommendations aimed at improving transport provision for visitors are provided.

CHAPTER 1 INTRODUCTION

Context of the research

1.1 Tourism in Scotland is both an important and extensive land use and a major contributor to Gross Domestic Product (GDP). The inseparability of tourism production and consumption means that tourism relies heavily on passenger transport both to access the destination, but also to travel around within it. The external accessibility of tourist destinations tend to receive significant attention by both tourism and transport planners and policy makers due to the desire to attract visitors into a particular destination, normally for economic development reasons. Indeed, in the case of Scotland, substantial funding has been provided to improve the external accessibility of the destination through subsidies for the creation of new air and ferry routes. The success of these funding measures has been or is currently being evaluated through impact studies and surveys of passenger behaviour. However, the internal accessibility of Scotland to the visitor has received less focused attention. Whilst attempts have been suggested and prioritised for facilitating tourists' travel around Scotland, such efforts are mainly undertaken by tourism organisations throughout Scotland, whose ultimate power to effect changes to transport systems is largely limited to lobbying. Moreover, without a clear picture of how accessible Scotland is internally as a destination, or of the transport demands of visitors in terms of internal accessibility, any measures taken to enhance visitor transportation remain largely uninformed. How tourists travel around Scotland, the extent to which they are reliant on public transport and the importance of existing transport provision in their travel behaviour and experience of the destination, including the areas they ultimately visit, merits further clarification.

1.2 The Scottish Executive recognises the need to further the coordination of transport and tourism policies towards the aim of providing a quality destination transport system for the visitor. This readiness is highlighted in a number of recent documents published by the Scottish Executive. The response of the Executive to the report *First Impressions of Scotland* (Scottish Executive, 2005) highlighted the importance of considering tourist travel in the forthcoming National Transport Strategy and illustrated the Executive's understanding of the link between transport supply and the success of Scotland as a visitor destination. The Scottish Executive's Transport White Paper, *Scotland's Transport Future* (Scottish Executive, 2004), reinforces this view, by recognising the importance of transport in shaping visitors' perceptions and influencing the prospect of return visits. In addition, the recently published tourism strategy for Scotland (*Scottish Tourism: The Next Decade*) highlights the need to ensure excellent transport provision for visitors within Scotland and underlines the Executive's commitment to facilitating the use of sustainable transport options for visitors.

1.3 Towards informing and developing the above policy aims of the Executive, there is clear scope for wider investigation of the relationship between transport and visitor behaviour. This relationship has several dimensions. Firstly, the spatial nature of tourist transport demand and supply requires investigation, with a view to ensuring that the two correspond and are coordinated. Secondly, the association between information provision and transport use by visitors is worthy of further enquiry. The third salient dimension involves the connection between the quality of the tangible and intangible attributes of transport provision, such as speed, punctuality, customer service, safety, etc. and patterns of visitor transport use. The above factors combine to play a prominent role in visitors' perceptions of, satisfaction with and likelihood of returning to Scotland as a visitor

destination. Moreover, investigation of these three dimensions will provide an overview of the perceived accessibility of Scotland's tourism product. Ultimately, an improved understanding of these dimensions will facilitate the Executive's aim of achieving a coordinated and sustainable policy for the provision of transport for tourism.

Purpose of the study

1.4 Travel behaviour of visitors around Scotland has been investigated to a greater or lesser extent by academia and the public and private sectors involved in the provision of tourist and/or transport, albeit in a rather piecemeal fashion. Studies have been undertaken from both demand and supply perspectives, in urban and rural contexts at local and national level. However, there has thus far been no attempt to collect and collate the disparate information produced by such surveys in order to provide a meaningful picture of tourist travel behaviour in Scotland. This study has therefore been commissioned by the Transport Department of The Scottish Executive to provide an overview of existing research into the travel behaviour of visitors to Scotland. The principal aim of the study is to review and collate existing sources of information on the use of transport by those visiting Scotland for leisure, recreation and business purposes.

1.5 In conjunction with the objectives of the Scottish Executive, as outlined in the research specification, a thorough review of the literature and secondary data sources pertaining to the use of transport by visitors to Scotland for leisure, tourism and business purposes was conducted. The review sought to cover three main areas:

1. Visitor flows within Scotland were examined in order to identify existing data on spatial travel trends, travel behaviour and visitor type and visitor use of travel modes.
2. The scope and limitations of transport supply for visitors were evaluated in an attempt to appraise the internal accessibility of destination Scotland for visitors. The role of information in accessibility was considered and judgements made on key barriers to travel within Scotland, as indicated by the available data.
3. Visitor experiences of transport provision in Scotland were considered, in order to identify levels of satisfaction with existing transport services, and any relationship between transport provision and satisfaction with Scotland's tourism product.

1.6 Throughout the report, examples of good practice in the provision of transport for tourism and enhancing the visitor's transport experience are provided, along with case studies illustrating the above points.

1.7 The review outlined above, of existing literature and data, contributes to the understanding of visitor travel behaviour and decision making in Scotland and assists in indicating where the most important areas for future primary research lie within this area. The identification of research gaps is thus an important consideration of the study. The key outcomes of the study are an improved understanding of the relationship between destination transport and tourism in Scotland and an indication of future research requirements within this area, both of which will ultimately inform policy direction. It is foreseen that, whilst some of the research outcomes may feed directly into tourist transport policy, there will be areas which will require further research in order to fully enlighten policy making.

Study methods

1.8 Primary research has not been undertaken for the purpose of this study. The study has used a desk-based method, reviewing the existing literature and data sources pertaining to the study topic. A review of the academic literature was conducted to uncover any articles of particular relevance. Requests were sent to a large number of organisations throughout Scotland and beyond for details and findings of previous studies relevant to the research. In some cases, it has been possible to access original data sets, and additional analysis of the data has been undertaken to inform the research objectives. The authors would like to acknowledge the very high degree of cooperation that they have had from private and public sector transport and tourism providers in Scotland, in responding to requests for data to inform the study.

CHAPTER TWO BEHAVIOUR

FACTORS AFFECTING VISITOR TRAVEL

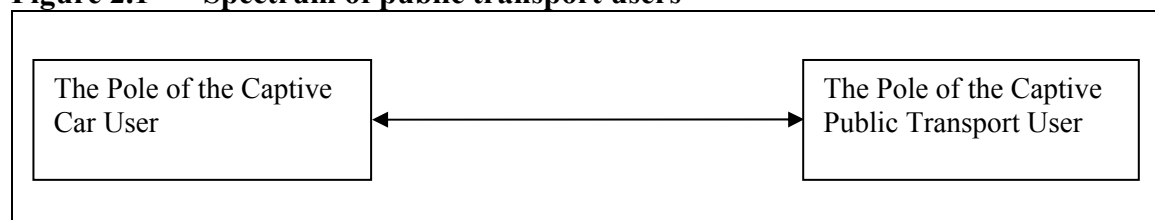
Introduction

2.1 This chapter reviews the relevant academic literature on modal choice, attempts to produce a constructive classification of the factors which are considered to affect modal choice and in particular seeks to isolate the roles of customer satisfaction (CS) and service quality (SQ) in modal choice. These factors are then evaluated from the perspective of the visitor to a destination, in an attempt to illustrate where and how potential differences can arise between visitors and local users of public transport in terms of their travel choice behaviour.

Factors affecting modal choice

2.2 Hovell *et al.* (1975) contend that the market for urban public transport falls along the continuum illustrated in Figure 2.1. At one end of the continuum, *captive car users* require a car (e.g. for work purposes) and are not considered to be potential public transport users. At the other end, *captive public transport users* do not have access to a car and are therefore reliant on public transport, where there is a need or desire to make a journey. In between the two poles, travellers have degrees of choice over the transport mode used. In the case of Scotland, around 35% of domestic visitors and 85% of overseas visitors arrive without their private car, placing them towards the pole of the captive public transport user. Nonetheless, visitors may choose to hire a car at the destination. The decision to use a car or the existing public transport infrastructure is likely to be based on many of the same factors that influence modal choice for local users; however other factors specific to visitors may be of equal relevance.

Figure 2.1 Spectrum of public transport users



Source Hovell *et al.* (1975)

2.3 Hovell *et al.* (1975) remark that whilst time and money costs are often cited as determining modal choice, 'the nature of the factors comprising these costs, their relative importance and interrelationship, is only imperfectly understood' (1975:42). They contend that analyses of factors affecting modal choice must extend beyond time and money costs, suggesting that the following service attributes are additionally evaluated by consumers in the decision to use public transport.

- Price;
- In-vehicle time (duration of trip, speed);
- Mesh density (route coverage and access to stops);
- Frequency;

- Reliability ;
- Comfort.

2.4 The decision to use public transport is considered to be based on subjective perceptions of these six service attributes influenced by available information and promotional tactics particularly in the case of non-local and first time users, into which category visitors will fall.

2.5 Kittleson and Associates *et al.*, (1999:38) affirm a very strong relationship between public transport SQ and modal choice.

“Quality of service reflects the kinds of decisions a potential passenger makes, consciously or not, when deciding whether to use transit or another mode, usually the private automobile.”

2.6 They distinguish between two parts of the decision making process, arguing that service attributes are only taken into account once travellers have established that public transport is an option for the journey. The usability of public transport is assessed on the basis of four types of availability. *Spatial availability origin* and *spatial availability destination* are gauged on the basis of whether there is a demand responsive public transport service available within walking distance of the origin and destination of the trip. In addition, *information availability* (the availability of adequate and accurate information) and *temporal availability* (whether a public transport service is available at the required time) affect the determination of whether public transport is an option for a particular journey or indeed whether the trip can be made (Kittleson and Associates *et al.*, 1999). Where public transport is considered to be an option for a trip, the decision process moves to stage two, which is an assessment of the *comfort and convenience* of public transport compared with other possible modes, the following factors being paramount in weighing *comfort and convenience* of public transport modes (Kittleson and Associates *et al.*, 1999):

- Potential for making journey on foot;
- Reliability of public transport service;
- Length of wait for service and availability of shelter at public transport stop;
- Security concerns;
- Crowdedness of public transport vehicle;
- Cleanliness of vehicles and shelters;
- Cost of trip;
- Number of transfers required;
- Duration of trip relative to other modes.

2.7 Like Hovell *et al.* (1975), Kittleson and Associates *et al.* (1999) highlight the subjectivity of modal choice, stressing that individuals will weigh the above factors according to their own personal values.

2.8 Whilst the observations of Hovell *et al.* (1975) and Kittleson and Associates *et al.* (1999) provide a useful overview of transport modal choice, there is no evidence that the factors which are claimed by these two studies to affect modal choice have been derived from any empirical basis. However, two UK studies, conducted on a consultancy basis, have uncovered, by means of social survey techniques, a range of factors affecting the decision to use public transport within the UK.

2.9 A study of 1287 car users, investigating reasons why motorists use their car rather than public transport, established that the factors exhibited in Table 2.1 were of greatest importance in modal choice (Lex Service PLC, 1998).

Table 2.1 Top ten factors affecting motorists' decision to use public transport

Factors affecting motorists' decision to use public transport	Percentage of Respondents Mentioning Factor
Route coverage	38
Journey time	31
Carrying heavy load	31
Waiting time	27
Frequency	26
Reliability	23
Cost	23
Convenient timetabling	17
Convenient access to bus stop/station	15
Personal safety on board	9

Source: Lex Service PLC (1998)

2.10 Mackett and Robertson (2000) note that the factors established by Lex Service PLC (1998) are confirmed by the results of a UK household study of 1405 adults (Railtrack, 1998) which elicited the most significant factors that would have to improve for travellers to choose to travel by bus. The top ten factors are shown in Table 2.2.

Table 2.2 Top ten factors which would need to improve to increase bus usage

Factors Which Would Need to Improve for Travellers to Consider Using the Bus More	Percentage of Respondent Mentioning Factor
Frequency of services	55
Reliability of services	54
Cost of tickets	46
Overall speed of journey	31
Personal security at bus stops	30
Access to information about routes	29
Waiting facilities at bus stops	29
Convenience of timetables	28
Cleanliness of Vehicle	27
Lighting around bus stops	27

Source: Railtrack (1998)

2.11 Whilst Table 2.2 focuses only on modal choice with regard to use of the bus as an alternative to the car, there is a clear overlap with other studies discussed above which examine factors affecting the decision to use public transport in general. Furthermore, the studies by Lex Service PLC (1998) and Railtrack (1998) provide an indication of the importance of the various factors in determining modal choice.

2.12 A study of factors affecting modal choice with specific reference to rail travel (Hanna and Drea, 1998) established a more general series of attributes considered by consumers when choosing to use the train. These attributes, which were observed from a series of focus groups, show that modal choice is affected by a combination of factors relating to both the 'in-transit experience' and the 'antecedents and consequences of ridership' (Hanna and Drea, 1998: 40). This finding is consistent with those of Lex Service PLC (1998) and Railtrack (1998), both of which established that factors related to the pre- and post-journey stages (e.g. access to and lighting at bus stops) were important to modal choice.

2.13 An indication of the importance of the attributes affecting modal choice observed by Hanna and Drea (1998) is shown in Table 2.3. Whilst Hanna and Drea (1998) included both leisure and business travellers in their survey sample, the focus of the paper is on significant differences between train users and non-users, and the results are not disaggregated by journey purpose. Notably, Railtrack (1998) and Hanna and Drea (1998) both identify location/route coverage as the most important factor affecting the decision to use public transport. The fact that route is not identified in the study of factors needing to improve for travellers to use the bus (Lex Service PLC, 1998) may well be due to the generally much higher density of bus route coverage.

Table 2.3 Importance¹ of attributes influencing modal choice

Attribute	N	Mean	Standard Deviation
Can travel where I want (location)	1654	4.60	0.71
Can travel when I want (timing)	1656	4.49	0.80
Comfort	1661	4.46	0.76
Cost	1658	4.33	0.94
Ability to be productive in transit	1641	2.72	1.44

Source: Hanna and Drea (1998)

2.14 It is useful, at this point, to examine collectively the factors which have been suggested in the transport literature discussed above to play a role in modal choice. Table 2.4 shows the factors which are mentioned in more than one of the above studies.

Table 2.4 Summary of factors mentioned in more than one study of public transport modal choice

Factors affecting modal choice	Number of Studies Mentioned in (maximum 5)
Cost of journey	5
Duration of journey	4
Reliability of services	4
Frequency of services	3
Personal safety	3
Waiting time	3
Comfort on board	3
Route coverage ²	3
Cleanliness of vehicles	2
Convenient timetabling	3

2.15 The findings of the above studies suggest that there are similarities between customer defined and operator defined attributes affecting modal choice suggesting that it is factors which are under the control of the public transport operator (henceforth called *system factors*) which are of overriding importance to customers as well as to the operators themselves.

2.16 However, in addition to the system factors discussed above, it is possible to isolate two other types of factor which have also been identified (albeit less frequently) as playing a role in transport modal choice (see Figure 2.2). *External factors* are referred to by Atkins (2001) as *background factors* affecting the performance of public transport and by Hanna and

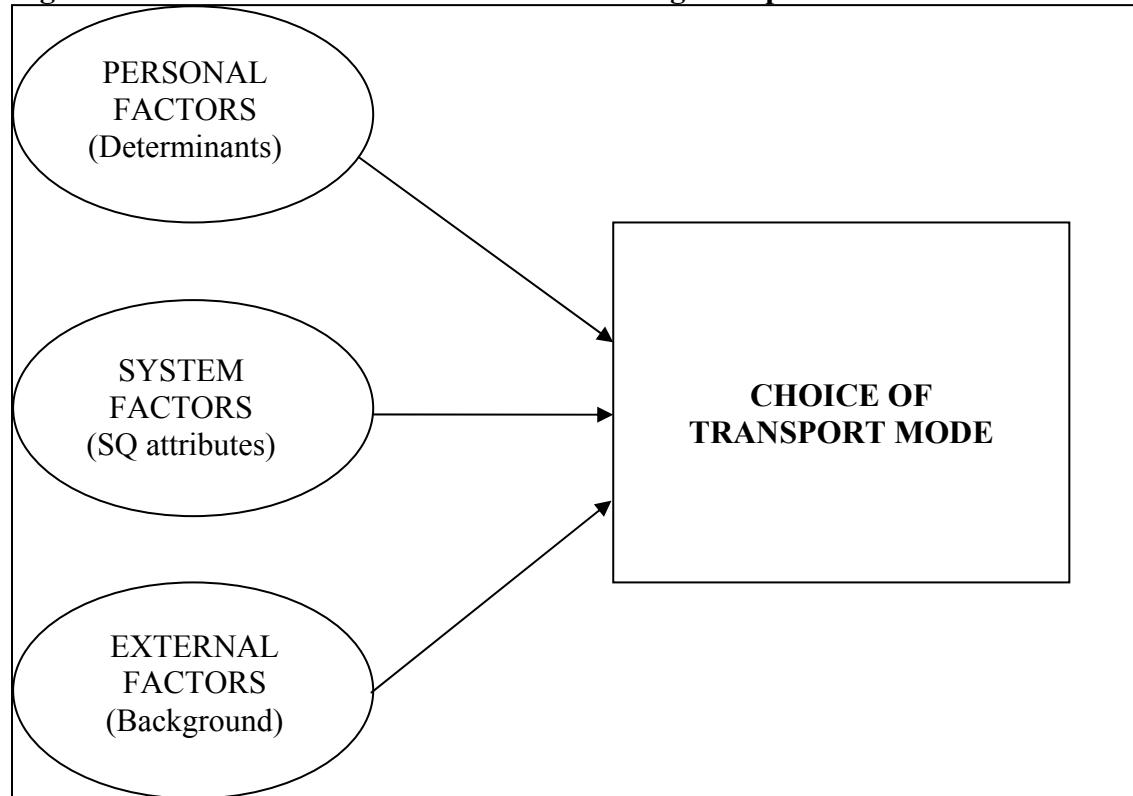
¹ Importance is measured on a five point Likert scale where 1= unimportant and 5=important.

² Route coverage refers to both the adequacy of existing public transport routes in relation to the needs of the traveller and total coverage of an area by public transport, i.e. distance from origin and destination of trip to public transport node.

Drea (1998) as *external environmental variables*. Hanna and Drea (1998) note that these factors can be considered relevant to modal choice.

“From a theoretical standpoint, these variables combine with perceptions of the actual in-transit experience to create a total transportation experience, and it is the perception of this total transit experience which determines consumer choices at each level of the decision process.” (Hanna and Drea, 1998:38)

Figure 2.2 Classification of factors influencing transport modal choice



2.17 External factors are destination specific, including features such as the natural and built environment, climate and levels of crime. Atkins (2001) argues, for example, that the presence of attractive and architecturally significant buildings may lead to greater environmental awareness, higher tolerance of traffic controls and increased demand for public transport. Furthermore, factors such as a flat landscape and dry climate may increase the propensity to cycle or walk. In addition to external and system factors, *personal factors* play a role in determining mode of transport choice. This category includes factors which are specific to the individual customer, such as disability or illness, amount of disposable income, or even personality type. Indeed, one of the factors identified above in the survey by Lex Service PLC (1998) as affecting motorists’ decision to use public transport, namely carrying a heavy load, can be considered to be a personal factor, rather than one which relates to the system, although the provision by public transport operators of on-board facilities for storing luggage may be a further determining (system) factor.

2.18 Significantly, a qualitative study of transport choice, carried out through a series of focus groups and interviews in various UK locations, identified a number of key customer

needs including not only system factors, but also a wide range of personal and external factors. These needs (illustrated in Figure 2.3) were found to be critical factors in determining mode of transport choice (URS Thorburn Colquhoun *et al.*, 2000). The research also confirms the relationship with customer satisfaction since the fulfilment of these transport needs was found to lead to high levels of satisfaction, thus establishing a clear link between satisfaction and modal choice.

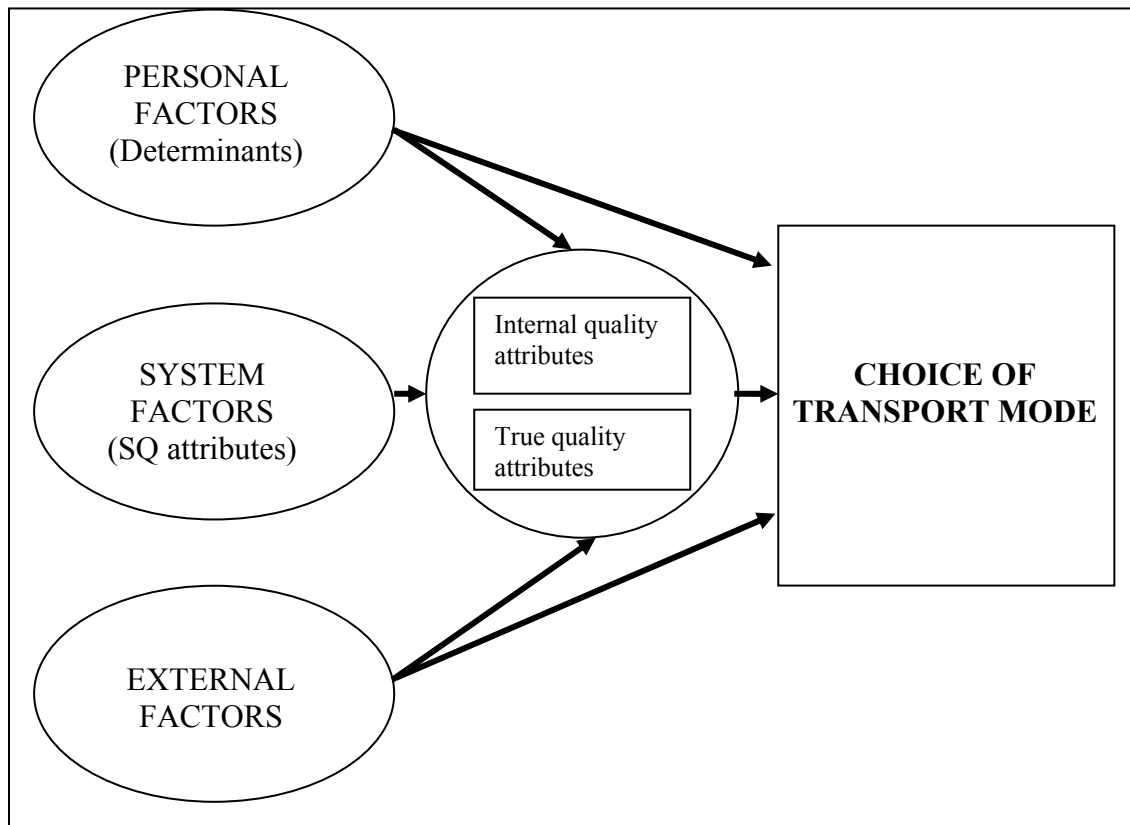
Figure 2.3 Customer defined transport needs

Transport Needs	Examples Cited in Focus Groups
Individualism	<ul style="list-style-type: none"> • Travel alone or with selected companions • Ability to control temperature • Freedom to escape
Reassurance	<ul style="list-style-type: none"> • Control of journey • Reliability • Personal safety and that of family
Flexibility	<ul style="list-style-type: none"> • Ability to change plans • Full utilisation of time
Convenience	<ul style="list-style-type: none"> • Ability to set off immediately • More efficient use of time • Ability to carry loads • Staying warm and dry
Immediacy	<ul style="list-style-type: none"> • Ability to go anywhere at any time

Source: Adapted from URS Thorburn Colquhoun *et al.* (2000)

2.19 In summary, modal choice has been shown to be affected by three types of factor, only one of which the transport operator has the ability to control. Whilst the captive public transport user (Hovell *et al.*, 1975) may have no option but to travel by public transport, the indication is that potential customers further along the continuum use perceptions of the performance (i.e. quality) of these system factors in deciding not only *for* public transport as a mode of travel, but also *between* public transport modes. In other words, the perceived quality of public transport has an importance influence on modal choice, and acts together with personal and environmental factors in dictating travel decision making as regards modal choice. This relationship is illustrated in Figure 2.4.

Figure 2.4 Direct and indirect influences of personal, system and external factors on choice of mode of transport



Factors affecting visitors' satisfaction with urban public transport

2.20 Few studies of modal choice have differentiated between perceptions of frequent and occasional users of public transport or between work and non-work journeys. It is therefore useful to consider what particular factors may affect visitors' satisfaction with urban public transport and subsequent travel choices. The results of studies which have focussed specifically on the importance of attributes of public transport service quality for non-work journeys or infrequent users will be incorporated.

2.21 Whilst visitors may use many of the same performance attributes that residents use to evaluate satisfaction with public transport, the degree of importance awarded to attributes of quality by visitors may differ from that of residents. Additionally, the personal factors which apply to visitors, particularly those from overseas, and the external factors which are characteristic of the destination in question may influence performance ratings. Tourists have particular characteristics and needs as public transport users in a new destination. They are likely to be first time or occasional users of the system and will be much less familiar with the public transport system than local residents. In addition there may be language difficulties which influence perceptions of performance. Moreover, the importance of transport links to and around tourist areas of the destination potentially acquires a greater importance for the leisure visitor.

2.22 In order to examine the effect of personal factors on perceptions of quality, some of the attributes most frequently included in surveys of satisfaction with public transport in Europe (see Quattro, 1998) are discussed below and suggestions are made as to how these attributes may be viewed differently from the perspective of the visitor.

Customer care

2.23 Visitors who are unfamiliar with a destination may place greater importance on helpfulness and reassurance from public transport staff. Regular users of a public transport system who have local knowledge are often familiar with names of stops and prices for journeys, and thus place less importance on the helpfulness and knowledge of public transport staff in respect of customer care. Visitors, on the other hand, are likely to place greater importance on the helpfulness of ticket staff and drivers who exercise patience and courtesy in communicating with them. In addition, visitors may value knowledgeable drivers who are not only familiar with the route but can also advise on connections to other modes of transport and access to visitor attractions.

Reliability (including waiting time, frequency, punctuality)

2.24 Whereas business visitors may rank reliability similarly to local commuters, leisure visitors may assign less importance to leaving and arriving on time since the majority of journeys undertaken will be for non-essential leisure purposes. Findings from a study by Paine *et al.* (1969) support this hypothesis. Whilst the importance of reliability of public transport was rated 5.89 on a seven point Likert scale for work trips, it was rated 5.64 for non-work trips (Paine *et al.*, 1969). Similarly, the importance of travel time was rated 4.99 for work trips but only 4.72 for non-work trips (*ibid*). As regards frequency, visitors' perceptions of performance on this attribute are likely to be affected by the location in which they are staying during their visit. Furthermore, a lack of timetable knowledge may mean that frequency is of greater importance to visitors than to residents who may use the same service every day.

Information

2.25 The role of information in perceived public transport quality has been shown above to be of great importance to local users. For visitors, it may be of even greater importance. Certainly, the amount, type, time and location of information required by visitors is likely to be different to that favoured by local users. For example, visitors may place greater importance on the availability of information in advance of arrival and visitors from overseas may desire, or even require, information to be available in a variety of languages. Furthermore, the availability of public transport customised for the tourist and integrated with attractions information may also be valued. Balcombe and Vance (1998) and Blackledge (1992) identified differences in the type of information that regular and occasional users of public transport require in order to make a journey, but also in the timing and location of that information. The role of information in the visitor transport experience is elaborated further in Chapter 5 of this report with specific reference to Scotland.

Safety and security

2.26 Scotland's two largest cities account for a sizeable percentage of tourist visits. 34% of domestic trips and 76% of overseas trips to Scotland take in Edinburgh and Glasgow (VisitScotland, 2003). Personal security on board public transport in urban areas may be of concern to visitors, particularly those who are not urban residents in their home country. The importance of safety may also be affected by a lack of knowledge on what action to take in an emergency. Furthermore, performance ratings on safety may be influenced by differing perceptions of what is acceptable behaviour by fellow travellers at an unfamiliar destination.

Cleanliness

2.27 Expected levels of cleanliness may be affected by standards in the home country or equally by more general public cleanliness standards at the destination. However, visitors may apply higher standards of cleanliness to a tourist destination than to their place of residence, increasing the importance of cleanliness of public transport vehicles and stations at the destination.

Ticketing

2.28 Whilst residents are often familiar with the exact or approximate cost of a public transport journey and the different ways in which the journey may be paid for, visitors are likely to require information on the ticketing system, particularly since public transport ticketing systems vary so greatly on a national and international level. Furthermore, visitors' length of stay at the destination will not necessarily coincide with the weekly or monthly tickets available to residents. van der Berg *et al.* (1995) have noted the lack of a designated tourist ticket at many urban visitor destinations and ETC (2001) have highlighted the importance of the ability to purchase tickets for entire journeys, or indeed tickets which also permit entry to (as well as travel to) attractions. Failure to provide such specific measures for the visitor may have an effect on his satisfaction with the transport service at a destination.

Chapter summary

2.29 In summary, mode of transport is argued to be directly affected by personal, system and external factors, however personal and external factors also indirectly affect modal choice by means of their influence on perceptions of transport quality. The range of factors and attributes affecting visitors' travel behaviour and the tentative relations between these are encapsulated in Figure 2.4. The most important performance attributes of public transport quality have been established both from a customer and operator perspective. These attributes have subsequently been considered with specific reference to visitors' use of public transport. Evidence from previous research suggests that there may be differences in the ways in which visitors, particularly those from overseas, and local residents evaluate public transport, both in terms of the performance attributes they use to measure quality and satisfaction and the degree of importance awarded to these attributes.

CHAPTER THREE CURRENT PATTERNS OF VISITOR TRAVEL BEHAVIOUR WITHIN SCOTLAND

Introduction

3.1 In 2005, it is estimated that Scotland received around 10.5 million visitors from outside Scotland. Just over 76% of the visits originated in the rest of the United Kingdom, with the remainder having an international origin (VisitScotland, 2005a). This chapter seeks to investigate what is known about the travel patterns of visitors to Scotland by identifying relevant literature and secondary data sources and, as far as possible, to use this information to map current patterns of travel behaviour. The process of drawing together available information from a variety of sources also enables limitations of existing data and gaps in knowledge to be identified.

3.2 For the purposes of the analyses presented in this chapter, unless otherwise stated, the term ‘domestic visit’ refers to a trip to Scotland made by a resident of England, Wales or Northern Ireland and which involves at least one overnight stay. The term ‘overseas visit’ refers to a trip to Scotland made by a resident of another country, again involving at least one overnight stay.

3.3 This chapter is structured in the following way. Firstly, a framework for the characterisation of visitor travel patterns is presented, key data sources are identified and the quality of the available data is considered in relation to this characterisation. Secondly, recent trends in visits to Scotland and the attributes and purpose of those visiting are explored. Thirdly, a detailed examination of the travel patterns of domestic and overseas visitors is undertaken.

Visitor travel patterns

3.4 The principal characteristics of the daily travel patterns of local users of a transport system is typically described with reference to the following core elements: the start and end points of travel, modes of transport used, time of travel and specific routes chosen. However, whilst drawing on this approach, a more complex descriptive framework is required to characterise the travel patterns of visitors to Scotland. As a minimum aspects of travel to and from Scotland, the ports of entry and departure and the location(s) and number of nights spent at overnight bases must be considered. Travel between the port of entry and the first overnight base, travel between overnight bases (where relevant), travel from the final overnight base to the port of departure and any day trips undertaken to local destinations from these bases must also be considered. More detailed aspects of travel behaviour such as the order in which bases are selected, how day trips to local destinations are combined and how travel to local destinations and between bases are combined might also be examined.

3.5 There are several surveys of visitors to Scotland undertaken either at a UK level or on specific major routes into or within Scotland. It is useful to explore how well these sources of data map on to the descriptive framework outlined above. This will enable the integration of available information from a variety of sources and also the identification in any gaps in knowledge. Before doing so, a brief review of the scope and quality of the existing data sources is undertaken in the following section.

Review of data sources

3.6 A review of available data sources identified several potentially useful surveys undertaken at a national level which focus on domestic and/or overseas visitors to Scotland. National estimates are produced from survey data. The accuracy of these estimates is dependent on the sample sizes used to produce them. However, the sample sizes available for certain population sub-groups may be insufficient to provide accurate estimates which places a limit on the degree to which data can be disaggregated.

United Kingdom Tourism Survey (UKTS)

3.7 The UKTS is a national consumer survey which measures the characteristics of trips away from home lasting one night or more taken by UK residents. It is jointly sponsored by VisitBritain, VisitScotland, the Wales Tourist Board and the Northern Ireland Tourist Board and began in 1989. From 1989 to 1999 the research methodology employed was face-to-face in-home interviews. Approximately 70,000 respondents were interviewed each year. From 2000 onwards, a random digit telephone interview methodology was adopted based on around 50,000 interviews per annum. However, the 2004 data set is not considered to be truly representative of the UK population because the response rate was found to vary with socio-economic circumstance (Star UK, 2006). From April 2005, a face-to-face interview methodology was adopted with a target annual sample size of 103,000.

3.8 For the purposes of the research undertaken in this report, with the exception of recent trends in domestic tourism (outlined in Paragraph 3.19 below), for which 2005 statistics were used, the 2003 UKTS survey dataset was the most recent reliable dataset available. Visitor estimates using the 2003 UKTS data set are based on a sample size of just over 2200 respondents who reported having made a visit to Scotland in 2003. The principal variables of interest are trip purpose, regional origin and destination(s), mode of travel and length of stay.

National Travel Survey (NTS)

3.9 The NTS is a series of household surveys designed to provide regular, up-to-date data on personal travel and to monitor changes in travel behaviour over time. It covers the UK mainland, excluding Northern Ireland, the Scottish Islands and Isles of Scilly. The first NTS was commissioned by the Ministry of Transport in 1965/66. Further periodic surveys were carried out in 1972/73, 1975/76, 1978/79 and 1985/86. Since July 1988 the NTS has been carried out as a continuous survey with one third of representative households surveyed in any year. Thus, representative samples of the UK mainland population for the years 1988 to 2004 are obtained by combining the NTS data set in three year periods (e.g. 1989 – 91). Field work was carried out in every month of the year with an annual set sample of over 5000 households. From 2005, the survey has tripled in size covering 15,000 households each year.

3.10 NTS participants are asked to complete a travel diary of all journeys, however small, undertaken in a specified target week. In addition, participants are asked to record “long distance” journeys (defined as journeys greater than 50 miles in length) for the three weeks preceding the target week. In this analysis, long distance journeys made by individuals

residing outside Scotland, but with a destination in Scotland, are selected. Two groups can be identified – those who start their long distance journey outside Scotland and those who start their long distance journey inside Scotland. It is important to note that shorter journeys (< 50 miles), such as day trips around Scotland from a fixed holiday base, are not covered in this analysis. However, those undertaking classic hotel based coach or car tours should be identified.

3.11 The analysis presented in this report is based on analysis of the NTS data sets and is structured around four three-year blocks (i.e. 1992 – 1995, 1995 – 1998, 1998 – 2001 and 2001 – 2004). The sample sizes for these four periods are small in comparison with UKTS sample sizes and are given in Table 3.1. Estimates based on NTS are therefore less accurate than estimates based on UKTS. Regional origin, mode choice, purpose and characteristics of travellers are recorded in the NTS for long distance journeys. One important limitation of the NTS is that regional destination within Scotland is only available for the period 1992 – 1995.

Table 3.1 Sample sizes of "long distance" journeys to and within Scotland

Origin of "long distance journey"	1992 - 1995	1995 - 1998	1998 - 2001	2001 - 2004
Outside Scotland	339	239	279	694
Within Scotland	184	164	142	197

Notes to table

Base data: National Travel Survey; 1992 - 2004

International Passenger Survey (IPS)

3.12 The IPS is a continuous survey carried out by the Office for National Statistics that collects information from passengers as they enter or leave the United Kingdom (National Statistics, 2006a). Travellers passing through passport control are randomly selected for interview at all main air, sea and tunnel ports or routes out of the UK, excluding sea routes to and from the Channel Islands, the land border with the Irish Republic and cruise ships travelling to and from the UK.

3.13 Around 250,000 interviews are carried out per year, representing 0.2% of all UK and overseas travellers as they enter or leave the UK. Of interest in this research study are overseas residents departing the country. Variables of interest include country of origin, port / route of departure and regions visited within the United Kingdom. Sample size reflects the flow of passengers passing through passport control at a specific port / route. Those ports / routes with passenger flows below certain minimum thresholds are generally excluded from the survey. The effect of this design is that sampling is concentrated at the main UK airports (Heathrow, Gatwick and Manchester) and on certain principal sea routes. 'Residual' airports, using the terminology of the IPS, such as Glasgow and Edinburgh, have much smaller sample sizes. In 2004, only around 460 interviews of overseas visitors departing by air were carried out at Glasgow and Edinburgh airports out of a total sample of about 46,000 interviews. Other Scottish airports were excluded from the survey altogether in 2004. However, since 2005, Prestwick airport has been included in the IPS in recognition of the fivefold increase in flow to nearly one and a half million passengers between 2001 and 2005 (National Statistics, 2006b).

3.14 The survey data are weighted to produce national estimates which are in line with known international passenger flows.

Civil Aviation Authority Survey (CAAS)

3.15 The CAAS is conducted at UK airports (Civil Aviation Authority, 2006). Departing air passengers are randomly selected for interview. Although similar in respect of the areas covered in the survey, a crucial distinction between CAAS and IPS is that both domestic and international departures are included in the former survey. Thus, domestic visitors to Scotland and departing overseas visitors travelling to another UK airport are surveyed in addition to overseas visitors on direct international flights. Five Scottish airports – Edinburgh, Glasgow, Aberdeen, Prestwick and Inverness – are included in the CAAS data set collected in 2005.

3.16 Nearly 13,000 completed interviews of domestic visitors to Scotland and over 8,300 overseas visitors to Scotland are included in the 2005 survey, and, of the latter figure, around 5,500 respondents were departing on international flights. The CAAS includes approximately 3,400 completed interviews of overseas visitors on international flights from Glasgow and Edinburgh airports which compares favourably with the sample size of the same surveyed population in the IPS.

Other sources of data

3.17 Three other data sets were used to explore the travel patterns of visitors to Scotland. These surveys provide some additional information to those carried out at a national level described above. Firstly, surveys of visitors using the Rosyth to Zeebrugge Superfast Ferry service were undertaken in 2002 and 2003 by VisitScotland and a group of Area Tourist Boards which aimed to *inter alia* build a profile of foreign leisure visitors coming to Scotland via the ferry link and find out about the characteristics of their trip (George Street Research Limited, 2003). A total of 304 self-completion surveys were completed in 2002 and 340 in 2003. Secondly, ticket sales data was obtained from First Scotrail on destination of passengers from Prestwick airport railway station. Finally, a report commissioned by Greater Glasgow and Clyde Valley Area Tourist Board, which presents the results of a survey of visitors to the Board area, was obtained (TNS, 2004). A total of 1,350 interviews with overnight visitors and day-trippers (excluding respondents living in Greater Glasgow and Clyde Valley area) were undertaken over the period June 2003 to June 2004.

Scope of reviewed data sets

3.18 Table 3.2 summarises the range of data available in accordance with key elements of the descriptive framework outlined in Paragraph 3.4 above. It can be seen that the national surveys of domestic and overseas visitors provide reliable data on the origin of visitors to Scotland, the mode of transport used to travel to Scotland and regions visited within Scotland. Other aspects of travel within Scotland, such as mode(s) of travel used, route choice and the order in which overnight stays are undertaken, are not covered by these surveys with the exception of the NTS which records long distance travel within Scotland for UK residents from outside Scotland and CAAS and IPS which record mode of travel to port/route of

departure. Data from the Rosyth to Zeebrugge Superfast Ferry supplements leisure data available in the IPS which is skewed towards the busy sea routes between England and the Continent. Data from First Scotrail on destinations travelled to from Prestwick Airport adds to the picture which can be developed from CAAS, although it should be noted that this is of limited value since data encompasses all travellers from the airport i.e. domestic (including Scottish) and overseas residents. The results of the Greater Glasgow and Clyde Valley Visitor Survey shed some light on the travel behaviour of visitors and day-trippers to the area.

Table 3.2 Information available from national surveys and surveys undertaken at major ports/routes of entry

	UKTS	NTS	IPS	CAAS	Rosyth-Zeebrugge Superfast Ferry	Prestwick Airport Station	Greater Glasgow & Clyde Valley Visitor Survey
Target visitor population	Domestic	Domestic	Overseas	Domestic & Overseas	Overseas	Domestic & Overseas	Domestic (excluding GGCV residents) & Overseas
Years of coverage	1989 to present	1965 to present	1961 to present	2005	2002 & 2003	2004/05	2004
Annual datasets used in report	1995 – 2003; 2005	1992-95; 1995-98; 1998-2001; 2001-2004	1995 - 2005	2005	2002 & 2003	2004/05	2004
Sample size of data used in this report (Year)	1,126 (2003)	See Table 2.1	Total unknown; 460 at Glasgow and Edinburgh airports (2004)	12,919 Domestic 6,159 Overseas	304 (2002) 340 (2003)	-	1,350
Residence	UK region	UK region	Overseas country	UK Region; Overseas country	Overseas country	-	Country of residence

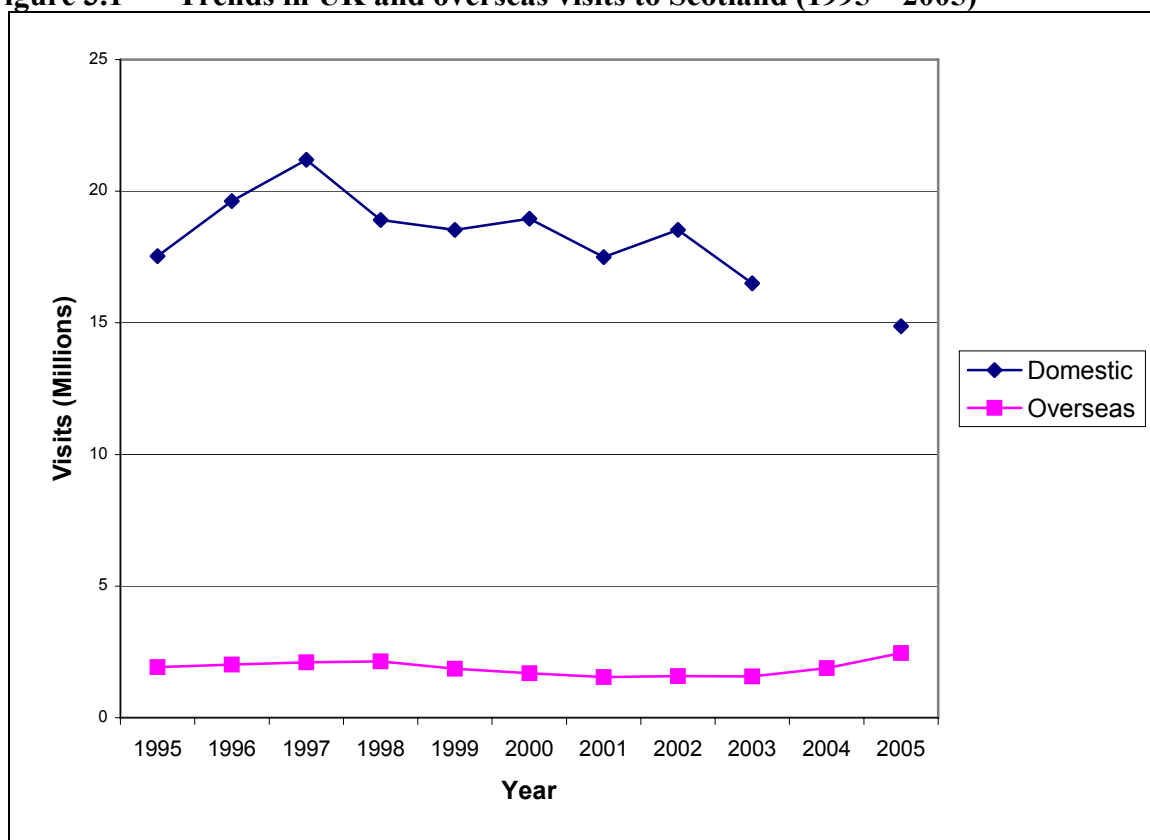
Table 3.2 cont/d

	UKTS	NTS	IPS	CAAS	Rosyth-Zeebrugge Superfast Ferry	Prestwick Airport Station	Greater Glasgow & Clyde Valley Visitor Survey
Entry to / departure from Scotland	Arrival mode	Mode: journeys > 50 miles. Scottish regional destination: journeys > 50 miles (1992-95 only)	Entry to UK by port/route and mode	Glasgow, Edinburgh, Prestwick, Aberdeen & Inverness airports	Rosyth Dock	Prestwick Airport	Mode of arrival in GGCV area
Travel to first overnight base	Scottish regions of overnight stays		Scottish region of overnight stays	Scottish region of overnight stays	Scottish region of overnight stay; Mode of transport.	Destination of rail travel from Prestwick airport (all users)	Areas within GGCV visited and stayed in.
Travel between overnight bases			Scottish region of overnight stays	Scottish region of overnight stays	Scottish region of overnight stays; Mode of transport.	-	-
Travel from last overnight base		Mode: journeys > 50 miles. Scottish regional destination: journeys > 50 miles	Mode of travel to port/route of departure	Location of last overnight base; mode of travel to port/route of departure	Scottish region of last overnight stay; Mode of transport.	-	-
Day trips undertaken to local attractions	-		-	-	Scottish regions visited without overnight stops (N.B. not distinguished from regions of overnight stays)	-	Mode of travel within GGCV area

Recent trends and principal characteristics of visitors

3.19 Figures 3.1 and 3.2 show trends for domestic and overseas visits to and nights spent in Scotland respectively. It should be noted that the estimates for domestic visitors in both these figures includes visits made by all UK residents including those resident in Scotland. It should also be noted that due to changes made in the UKTS and IPS methodologies (outlined above in Paragraphs 3.7 and 3.13 respectively), statistics for 2005 are not directly comparable with previous years. Table 3.3 distinguishes between visits to Scotland from the constituent parts of the UK in 2005. It can be seen that just under half the domestic visitors originate from within Scotland itself.

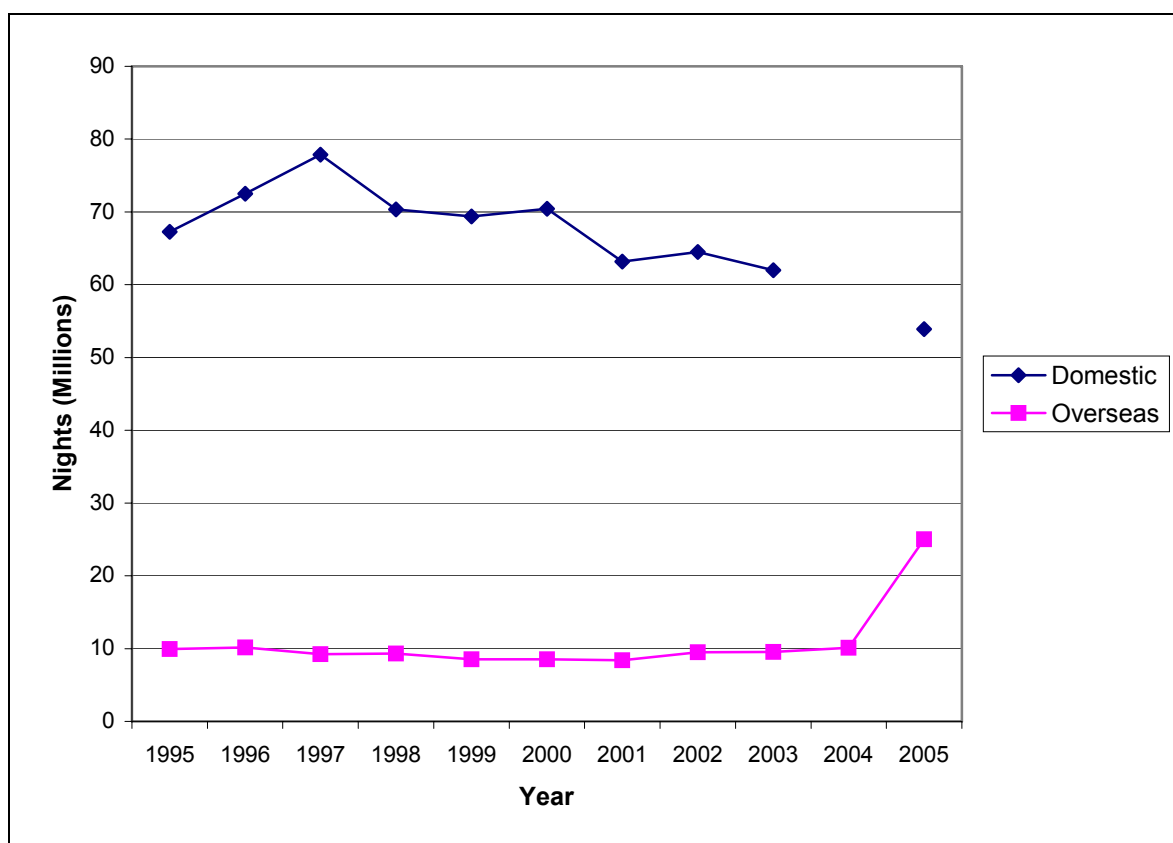
Figure 3.1 Trends in UK and overseas visits to Scotland (1995 – 2005)



Source: VisitScotland (2006a) (2006b)

Base data: Domestic visits (all UK visitors including Scottish residents), UKTS 1995 – 2005; Overseas visits, IPS 1995 – 2005

Figure 3.2 Trends in nights spent in Scotland for UK residents and overseas visitors (1995 – 2005)



Source: VisitScotland (2006a) (2006b)

Base data: Domestic visits (all UK visitors including Scottish residents), UKTS 1995 – 2005; Overseas visits, IPS 1995 – 2005

Table 3.3 Visits to Scotland by UK residents (2005)

	Visits (million)
Scotland	6.75
England	7.23
Rest of the UK	0.90
Total UK	14.87

Notes to table

Source: VisitScotland (2006c)

Base data: UKTS 2005

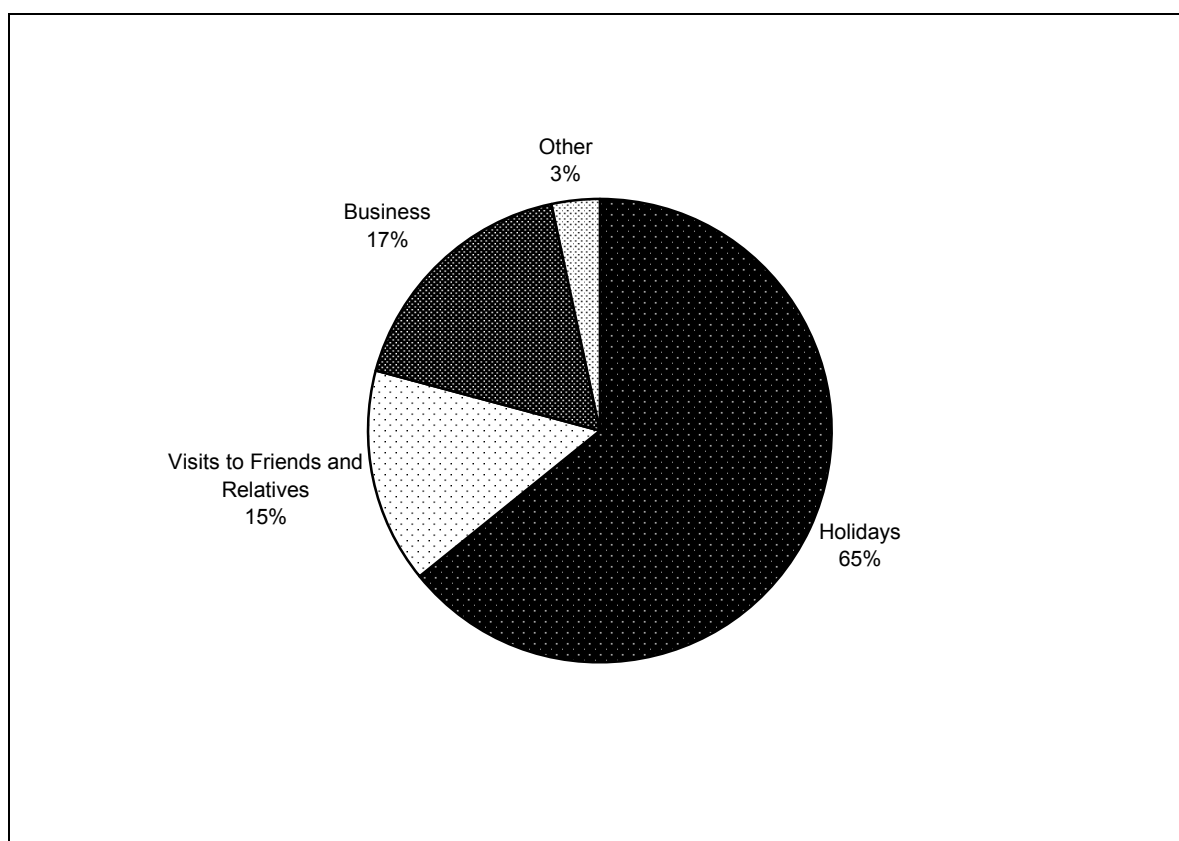
3.20 With reference to Figure 3.1, there is an apparent decline in domestic visits to Scotland. This may be explained, at least partly, by changes in the survey methodology employed by UKTS. In comparison, analysis of the NTS shows an increase in the number of long distance trips to Scotland over the period 1992-95 to 2001-04 from 7.46 million to 9.02 million. Some caution must be employed in comparing the UKTS and NTS: the surveyed populations are different in the two data sets, the UKTS measures overnight stays whilst the NTS measures long distance trips (which may or may not include an overnight stay) and, most pertinently, the NTS estimates are based on fairly small sample sizes.

3.21 Figure 3.1 shows a rise in the number of overseas visits from 2003 and Figure 3.2 shows a sharp increase in the number of nights spent in Scotland in 2005 by overseas visitors. However, the fivefold increase in passenger traffic at Prestwick airport between 2000 and 2004 is not reflected in the statistics used in both these figures (see Paragraph 3.13). Consequently, the actual rise in overseas visits and nights spent in Scotland would appear to have commenced at an earlier stage, probably around 2000, and increased at a significant but more gradual rate than reflected in Figures 3.1 and 3.2.

Domestic visits

3.22 Figures 3.3 to 3.5 illustrate the profile of domestic visitors to Scotland by purpose, age and by socio-economic circumstance respectively. It can be seen that the majority of domestic visits to Scotland take place for holiday purposes, whilst visiting friends and relatives and business form equal and significant proportions. The age profile of visitors is fairly evenly distributed, whilst, as might be expected, socio-economic classes AB and C1 are more likely to visit Scotland than socio-economic classes C2 and D.

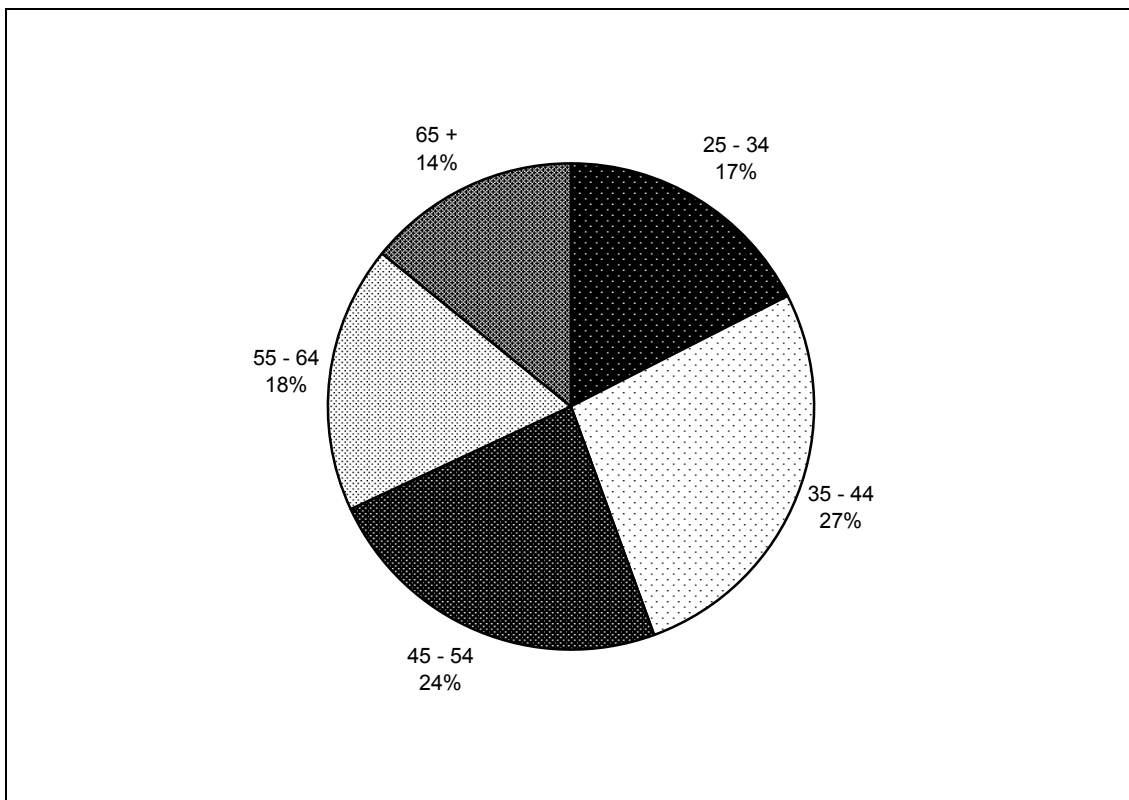
Figure 3.3 Purpose of domestic visits to Scotland (2003)



Source: VisitScotland (2006a)

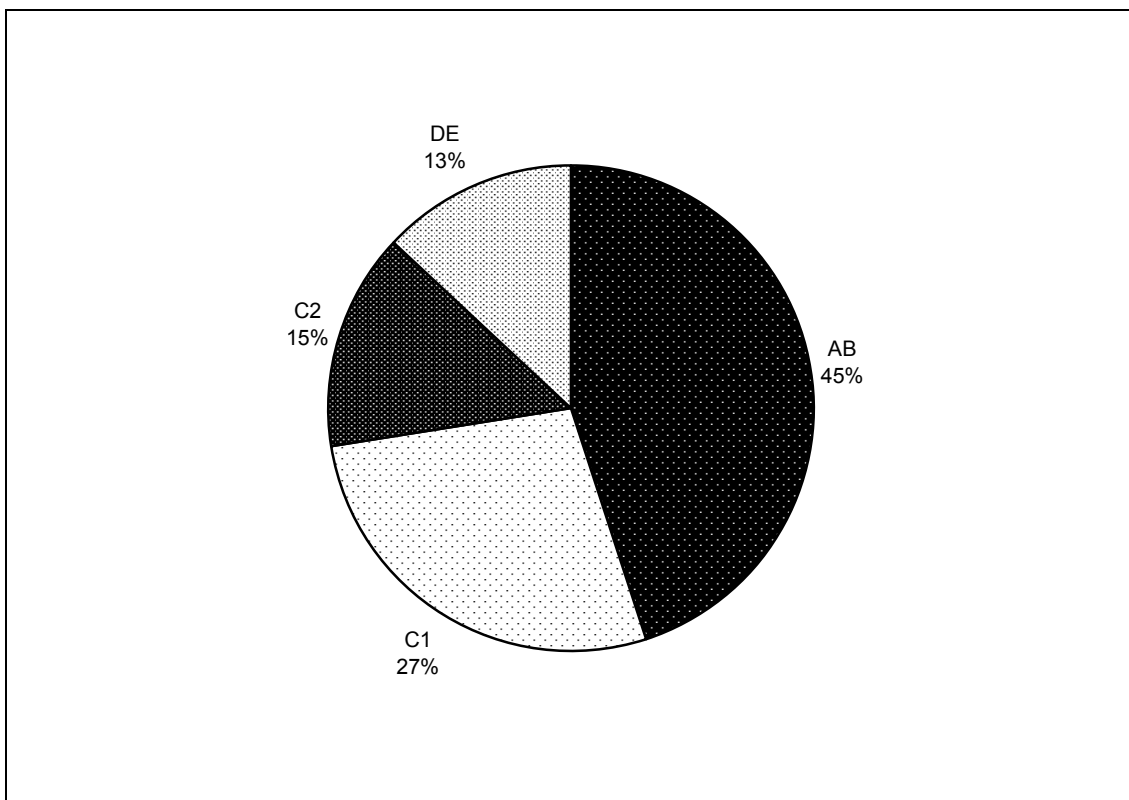
Base data: UKTS 2003 excluding Scottish residents

Figure 3.4 Age profile of domestic visitors to Scotland (2003)



Source: VisitScotland (2006a)
Base data: UKTS 2003 excluding Scottish residents

Figure 3.5 Socio-economic class of domestic visitors to Scotland (2003)

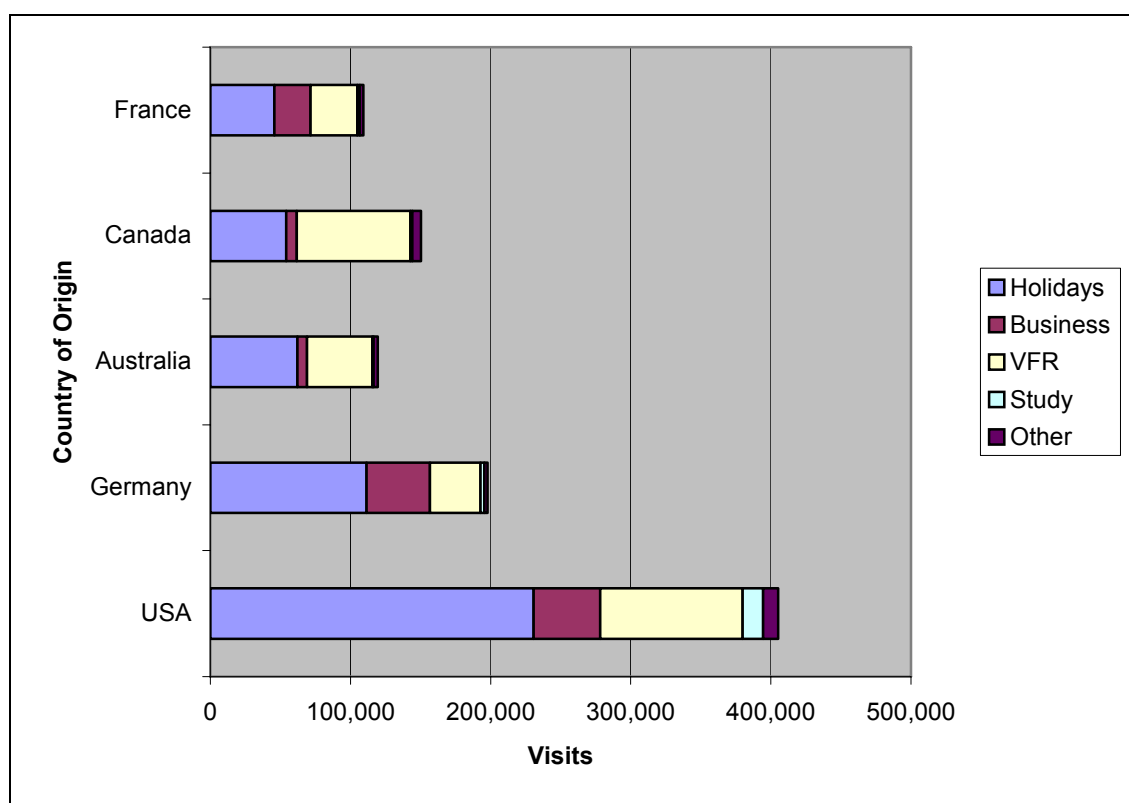


Source: VisitScotland (2006a)
Base data: UKTS 2003 excluding Scottish residents

Overseas visits

3.23 In 2004, according to the IPS, over 50% of the total number of overseas visits came from only five countries – United States of America, Germany, Australia, Canada and France. Furthermore, there were over half a million visits from North America alone and over 400,000 visits came from the European Union (VisitScotland, 2006b)¹. Figure 3.6 shows the purpose of visit for the top five countries. The USA is clearly the major source of overseas visitors to Scotland. Just over half of the visitors from USA come to Scotland on holiday and there is also a sizeable proportion who visited friends and relatives. The importance of family ties between Scotland and Canada is also apparent from this data with over 50% of the visits from Canada being for VFR purposes. Given the relative proximity of France and Germany to Scotland in comparison with the other countries, it is not surprising that there are a higher proportion of business visits to Scotland than for USA, Canada and Australia.

Figure 3.6 Overseas visits by purpose and country of origin (2004)

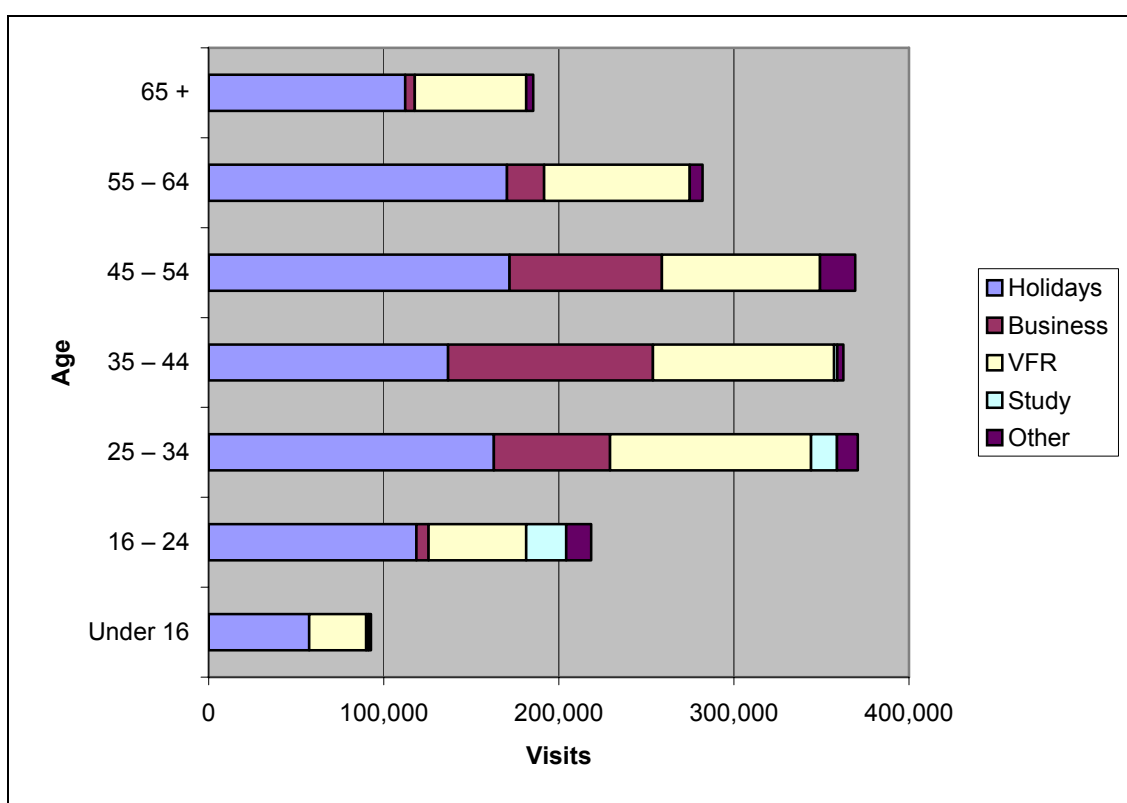


Source: VisitScotland (2006b)
Base data: IPS 2004

3.24 Figure 3.7 illustrates that the age profile of overseas visitors to Scotland is similar to that of domestic visitors. Not surprisingly visiting for the purpose of business is a significant proportion of all visits in the age categories 25 – 54 years.

¹ The IPS statistics for 2004 underestimate the number of visitors from the European Union because of the exclusion of Prestwick airport from the 2004 IPS. Prestwick airport serves domestic and European routes. In 2005, there were 1,247 million visitors to Scotland from EU15 (National Statistics, 2006b) which constitutes around 50% of the total number of overseas visits.

Figure 3.7 Overseas visits by age and purpose (2004)



Source: VisitScotland (2006b)
Base data: IPS 2004

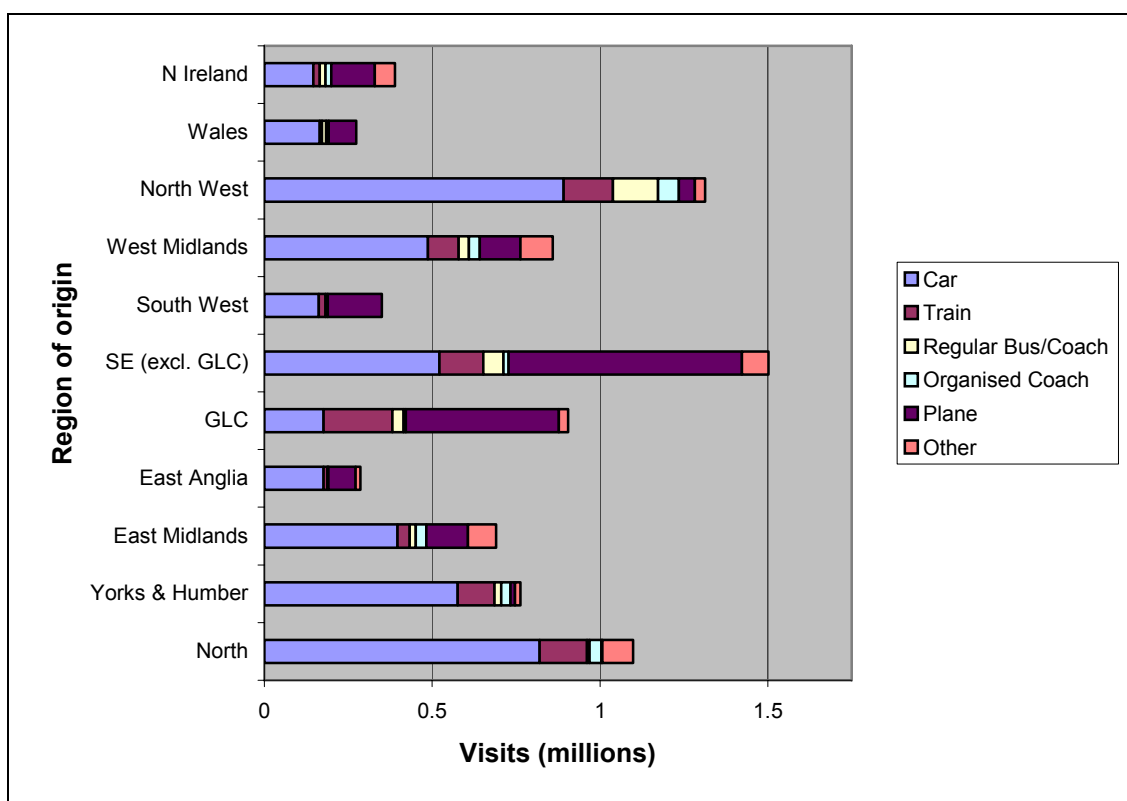
Mode of arrival in Scotland

Domestic Visitors

3.25 The UKTS allows the mode of arrival in Scotland to be disaggregated by UK region of origin. Overall, around 54% of visitors from the UK excluding Scotland arrive by car, 23% arrive by air and 11% arrive by train (VisitScotland, 2006a). The remaining visitors arrive by bus (either a bus service or an organised coach trip). Figure 3.8 shows an analysis of this data broken down by region. Broadly speaking, there is an inverse relationship between the percentage of visitors travelling to Scotland by car and the distance of the regional origin from Scotland. Thus, visitors from the North and North West of England and Yorkshire and Humberside are more likely to travel by car than visitors from the south of England and Wales. In contrast, travel by air forms the largest modal share for those resident in London, the South East and the South West. Travel to Scotland by train from London constitutes a modal share of 23%.

3.26 Figure 3.9 shows the mode of arrival disaggregated by purpose of visit for all UK residents' trips to Scotland. Although the car is the dominant mode for each purpose, it is interesting to note that the percentage of those leisure visitors travelling by air increases as holiday duration decreases. Also, travel by air also constitutes a relatively significant modal share for business/work travel reflecting, at least in part, the short duration of many business trips.

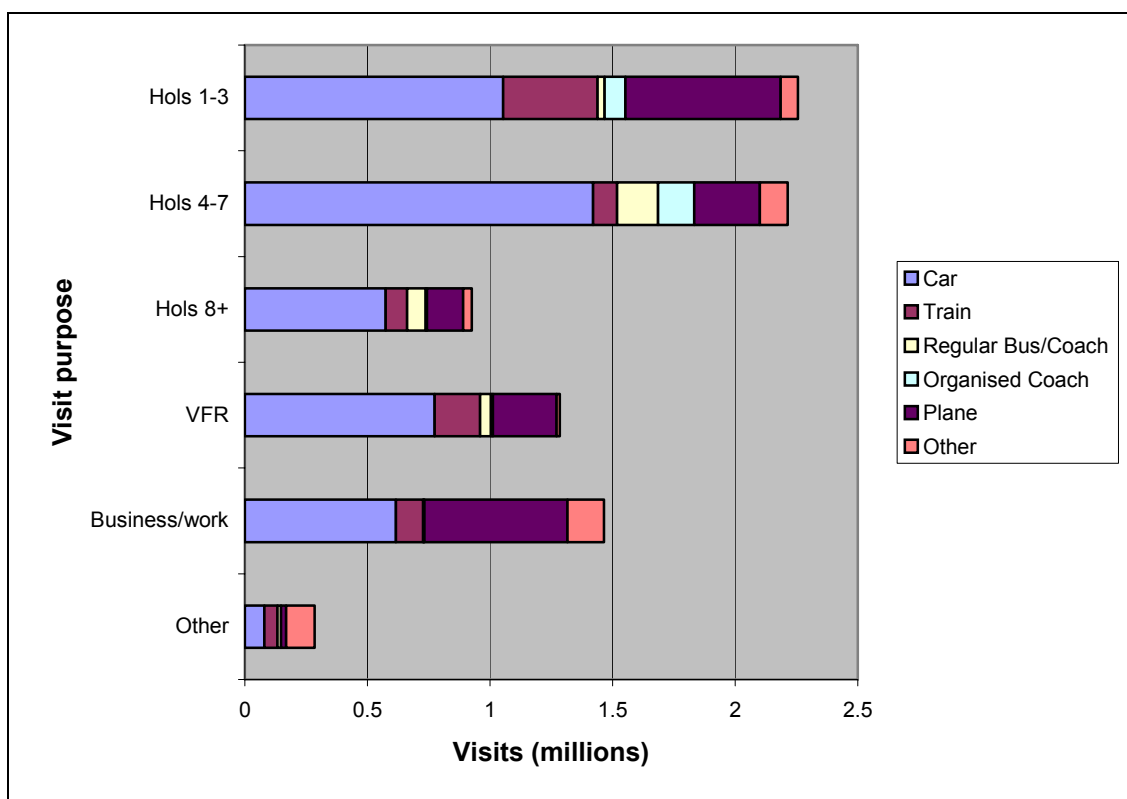
Figure 3.8 Domestic visitors' region of origin by arrival mode (2003)



Source: VisitScotland (2006a)

Base data: UKTS 2003 excluding Scottish residents

Figure 3.9 Domestic visitors' purpose by arrival mode (2003)



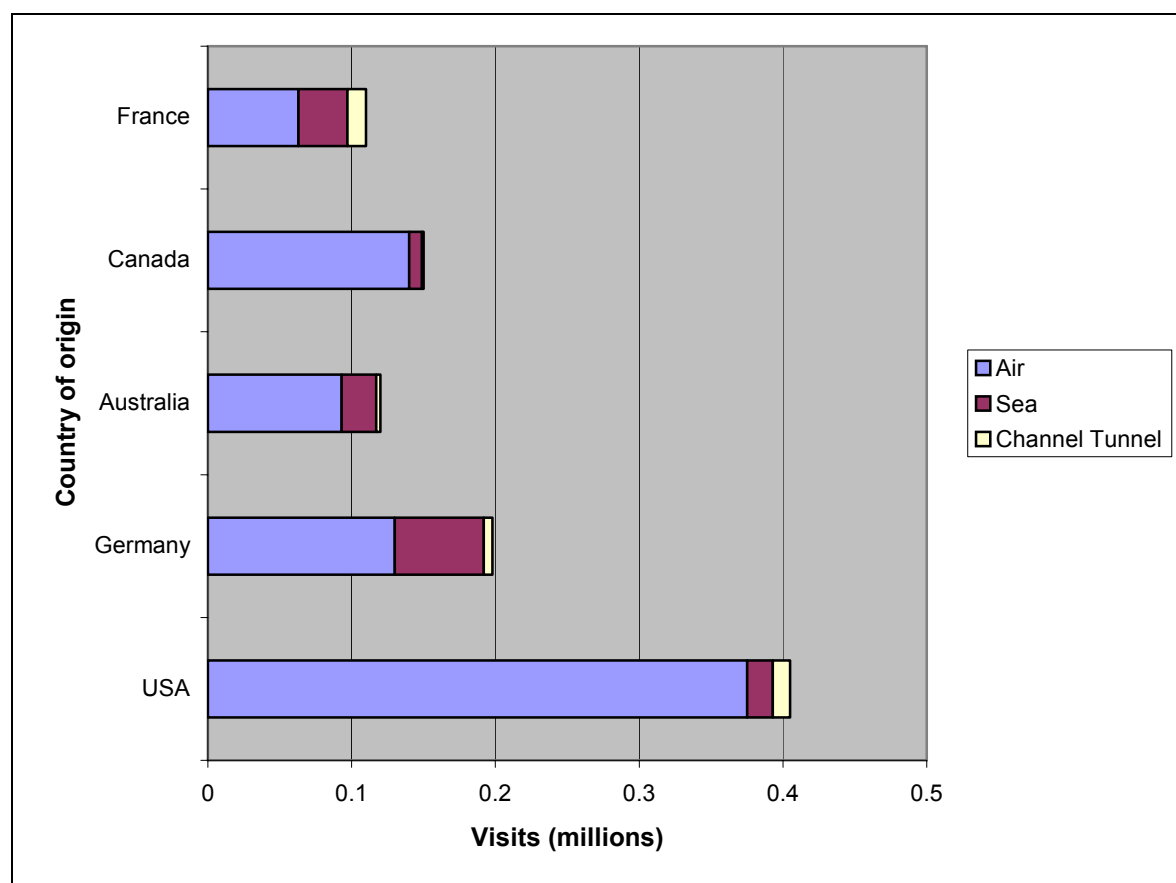
Source: VisitScotland (2006a)

Base data: UKTS 2003 excluding Scottish residents

Overseas visitors

3.27 The IPS estimates that the vast majority of overseas visitors to Scotland arrive in the UK by air – 82% in 2004 (VisitScotland, 2006b). Around 15% of overseas visitors arrive by sea and the Channel Tunnel only accounts for about 3% of overseas visitors. Figures 3.10 shows mode of arrival to the UK for the five most common countries of origin. Around 30% of residents in France and Germany who visit Scotland enter the UK by sea and around 10% of French residents who visit Scotland use the Channel Tunnel.¹ It is notable that over 20% of Australians use either a sea route or the Channel Tunnel when visiting Scotland. Figure 3.11 shows mode of arrival by purpose. Travel by air dominates each visit purpose, although travel by sea for holidays constitutes a modal share of around 22%. Statistics are not available for the proportion of leisure visitors travelling by sea to Scotland with a car and by foot.

Figure 3.10 Mode of arrival in UK of overseas visitors by country of origin (2004)

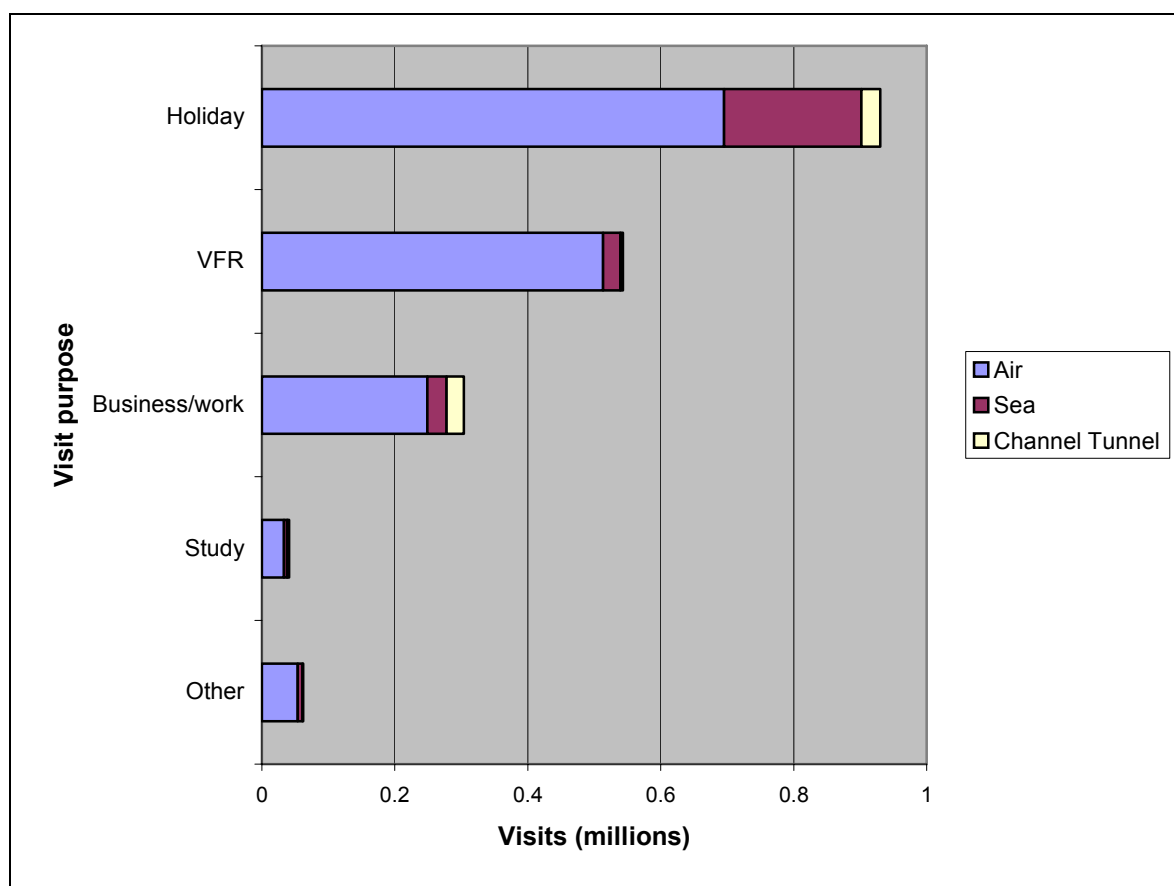


Source: VisitScotland (2006b)

Base data: IPS 2004

¹ Re. Paragraph 3.13 and Footnote 1, Page 30. IPS 2004 statistics do not include overseas visitors using Prestwick airport, most of whom have residency of a European country. Thus, IPS 2004 statistics are likely to underestimate significantly the proportion of visitors from European countries travelling by air to Scotland.

Figure 3.11 Mode of arrival in UK of overseas visitors by purpose (2004)



Notes to figure

VFR: Visiting Friends and Relatives

Source: VisitScotland (2006b)

Base data: IPS 2004

Destinations visited in Scotland

Domestic visitors

3.28 Table 3.4 shows estimates produced from the NTS of the origins and destinations of domestic trips to Scotland in the period 1992-95. Only three origins and destinations were elaborated for this analysis because of the small sample sizes available in the NTS. It can be seen that over half the trips commenced in the North of England, with around half of these trips having a destination in the East of Scotland. Overall consistently fewer trips finished in the North of Scotland than in the East or West of Scotland.

Table 3.4 Destinations of English and Welsh residents' trips to Scotland (1992 – 95)

Origin in England and Wales	Destination in Scotland			Total from origin region
	East	West	North	
North	24.2%	18.0%	8.9%	51.2%
Middle (incl. East & Wales)	7.8%	6.4%	4.1%	18.3%
South	11.3%	12.4%	6.7%	30.5%
Total to destination	43.4%	36.8%	19.8%	100.0%

Notes to table

Eastern region includes Borders and Lothian, Western region includes Strathclyde and Dumfries and Galloway whilst the Northern region includes all other parts of Scotland.

Base data: NTS 1992-95

3.29 Table 3.5 shows destinations visited in Scotland by domestic visitors from outside Scotland in 2003. It can be seen that Edinburgh and Lothian is the most popular destination visited in Scotland followed by Greater Glasgow and Clyde Valley. The attraction of the Highlands and Argyll, Loch Lomond, Stirling and the Trossachs as destinations is also evident in these figures.

3.30 As discussed in Paragraph 3.25 above, 23% of domestic visits to Scotland were undertaken by air. An analysis of regional destinations visited in Scotland for domestic visitors departing by air was undertaken using CAAS data set. The results of this analysis show that just over 3.5 million domestic visits were made to Scotland by air and the two most popular destinations were Edinburgh and the Lothians and Glasgow and Clyde Valley regions. Moreover, the proportions of visits to these two regions, expressed as a percentage of the total visits to Scotland, were 33% and 25% respectively (*cf.* Table 3.5 figures for domestic visitors arriving by all modes). This suggests that domestic visitors travelling by air have a higher propensity to visit the urbanised areas of Edinburgh and Glasgow than domestic visitors travelling to Scotland by other modes.

Table 3.5 Destinations visited in Scotland by domestic visitors (2003)

Scottish Region	Visits (%)
Aberdeen and Grampian	9
Angus and Dundee	3
ALLST	13
Ayrshire and Arran	6
Dumfries and Galloway	6
Edinburgh and Lothian (of which Edinburgh City)	21 (18)
GGCV (of which Glasgow City)	18 (16)
Highlands	14
Fife	4
Perthshire	5
Scottish Borders	3

Notes to table

Figures do not add up to 100% because a single visit to Scotland may encompass a visit to more than one region of Scotland
GGCV: Greater Glasgow and Clyde Valley; ALLST: Argyll, Loch Lomond, Stirling and the Trossachs

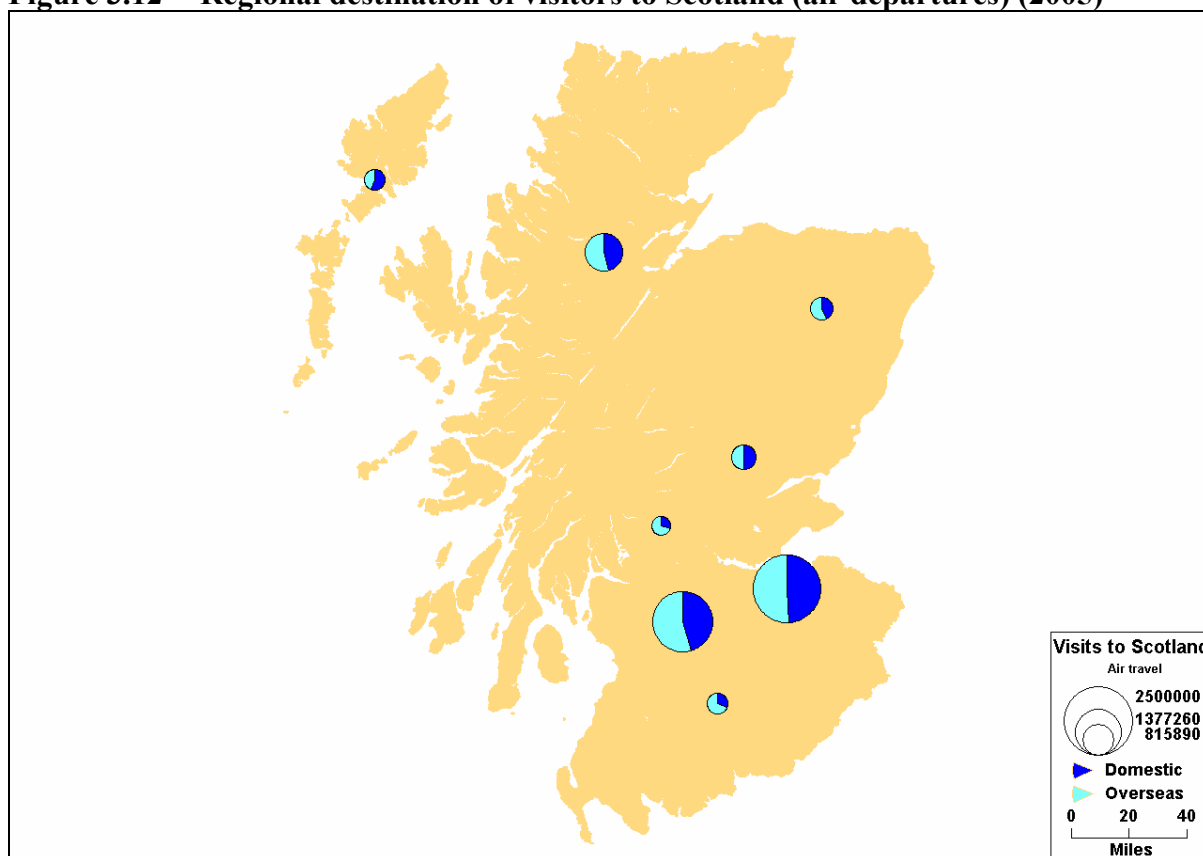
3.31 Two indices were constructed to represent the mobility of domestic visitors within Scotland and the degree of dispersal of domestic visitors around Scotland from the region in which the departure airport is located. The mobility index is based on the fact that a single visit to Scotland may encompass a visit to more than one region of Scotland. This index sums the total number of visits to each regional destination within Scotland and divides this figure by the total number of visits to Scotland (Equation 3.1). The minimum value of the mobility index is one. The higher the value of the mobility index is above one, the greater the mobility around Scotland. The dispersal index seeks to capture the extent to which domestic visitors remained within the region of the departure airport during their visit to Scotland. This index divides the total number of nights spent in the region of the departure airport by the total number of nights spent in all other regions of Scotland. (Equation 3.2). The minimum value of the dispersal index is zero. Higher values of the dispersal index indicate a lower degree of dispersal from the departure airport.

$$\text{Mobility index} = \frac{\sum_{\text{For all Region}_i} \text{Total visits to Region}_i}{\text{Total visits to Scotland}} \quad \text{Equation 3.1}$$

$$\text{Dispersal index} = \frac{\text{Total nights in Region of Departure Airport}}{\sum_{\text{For all Region}_i \text{ except Region of Departure Airport}} \text{Total nights in Region}_i} \quad \text{Equation 3.2}$$

3.32 Table 3.6 shows the mobility and dispersal indices for visitors using each of the Scottish airports, calculated from the CAAS dataset. It can be seen from the mobility indices that domestic visitors departing from Glasgow airport exhibit the highest degree of mobility around Scotland, followed by Edinburgh airport and then Prestwick airport. With regard to the dispersal indices, it can be seen that visitors using Prestwick airport exhibit a high degree of dispersal from the region in which Prestwick airport is located, followed by Glasgow airport and then Edinburgh airport. It is clear from both indices that Inverness and Aberdeen airports cater principally for their respective local catchment areas. Table A1.1 of Annex 1 to this report shows visitor flows to regional destinations in Scotland, disaggregated by airport of departure.

Figure 3.12 Regional destination of visitors to Scotland (air departures) (2005)



Source: VisitScotland (2006d)

Base data: CAAS 2005

Table 3.6 Degree of mobility and dispersal of domestic visitors (air departures) (2005)

Departure Airport	Mobility index	Dispersal index
Aberdeen	1.004	3.472
Edinburgh	1.075	1.361
Glasgow	1.090	1.095
Inverness	1.039	4.536
Prestwick	1.060	0.522

Notes to table

Source: VisitScotland (2006d), Base data: CAAS 2005

Overseas visitors

3.33 Table 3.7 shows the regional destinations visited in Scotland by overseas visitors estimated from the IPS 2004 data set. The importance of Heathrow airport as a gateway to Scotland is revealed in this table – over one quarter of all overseas visitors pass through Heathrow according to these figures. Glasgow and Edinburgh airports and Sea and Tunnel ports are also important gateways. Edinburgh City is the most significant attractor of overseas visitors to Scotland by some distance, followed by Glasgow and then the Highlands and Islands.

3.34 Figure 3.12 maps the total number of visits to regional destinations in Scotland for all purposes for those overseas visitors travelling by air from Scottish airports derived from the 2005 CAAS. Broadly speaking, these results confirm the distribution of visits to Scottish regions estimated by the IPS 2004. The size of the CAAS dataset allows estimates of visits to regional destinations for different purposes to be estimated with an acceptable degree of accuracy. Around 40% of the total leisure visits to Scotland involve a visit to Edinburgh and the Lothians.

3.35 Mobility indices were calculated from the CAAS for overseas visitors using each of the Scottish airports (see Table 3.8). As might be expected, leisure visitors display a higher degree of mobility than the mobility of all visitors considered together.¹ Furthermore, it can be seen that, typically, visitors using Prestwick airport visit more regions of Scotland than those using any other airport. Tables A1.2 and A1.3 of Annex 1 to this report show overseas visitor flows to regional destinations in Scotland, disaggregated by airport of departure.

3.36 Table 3.8 also shows dispersal indices for each Scottish airport. It can be seen that visitors using Prestwick airport exhibit a higher degree of dispersal from the region in which the airport is located than all the other airports.² To place these figures in context, according to CAAS, of the estimated 7.5 million nights spent in Scotland by overseas leisure visitors using Edinburgh airport, 4.1 million nights were spent in Edinburgh and the Lothians. In contrast, only 1.6 million of the estimated 6.8 million nights were spent locally by those using Prestwick airport.

¹ A higher degree of mobility is indicated by a higher value of mobility index.

² A higher degree of dispersal is indicated by a lower value of dispersal index.

Table 3.7 Destinations visited in Scotland by overseas visitors by port/route of departure (2004)

Port or route of departure	Total	ALLST	Greater Glasgow, Clyde Valley	Glasgow	Ayrshire & Arran	Dumfries & Galloway	Scottish Borders	Lothian	Edinburgh	Fife	Perthshire	Dundee & Angus	Grampian	Highlands & Islands	Not specified
Heathrow	515,421	45,706	135,874	127,301	18,604	11,133	5,185	276,265	271,829	18,431	19,389	12,566	62,156	96,451	4,626
Gatwick	93,450	9,805	13,856	11,697	2,023	2,173	802	60,403	59,339	5,976	4,057	2,688	10,668	22,204	3,498
Manchester	50,207	10,123	11,976	10,856	2,332	1,810	4,251	20,482	17,755	2,733	4,731	554	7,057	13,046	0
Non-Scottish UK residual	233,214	21,000	76,126	69,960	5,330	7,321	11,293	114,350	112,421	11,637	3,023	3,199	21,567	36,802	6,340
Glasgow	342,080	64,525	227,145	178,443	37,611	8,097	2,432	90,407	79,213	24,467	23,686	15,468	24,739	92,226	0
Edinburgh	309,709	55,120	45,970	43,290	4,584	2,092	11,452	230,903	227,260	25,359	18,834	16,395	25,292	63,234	0
Total UK Sea & Tunnel Ports	337,097	51,274	106,453	94,340	9,060	20,591	1,322	172,371	170,696	11,652	19,930	14,110	18,355	137,125	17,764
Total	1,881,178	257,553	617,400	535,887	79,544	53,217	36,737	965,181	938,513	100,255	93,650	64,980	169,834	461,088	32,228

Notes to table

Figures do not add up to 100% because a single visit to Scotland may encompass a visit to more than one region of Scotland

ALLST: Argyll, Loch Lomond, Stirling and the Trossachs

Figures for Edinburgh and Glasgow cities are shown separately and are also incorporated into Edinburgh and Lothian and Greater Glasgow and Clyde Valley figures respectively

Source: VisitScotland (2006b)

Base data: IPS 2004

Table 3.8 Degree of mobility and dispersal of overseas visitors (air departures) (2005)

Departure Airport	All overseas visitors		Overseas leisure visitors	
	Mobility index	Dispersal index	Mobility index	Dispersal index
Aberdeen	1.074	4.344	1.142	4.639
Edinburgh	1.320	1.084	1.396	1.179
Glasgow	1.627	0.925	1.776	0.814
Inverness	1.153	4.627	1.171	3.744
Prestwick	1.960	0.318	2.015	0.319

Notes to table

Source: VisitScotland (2006d), Base data: CAAS 2005

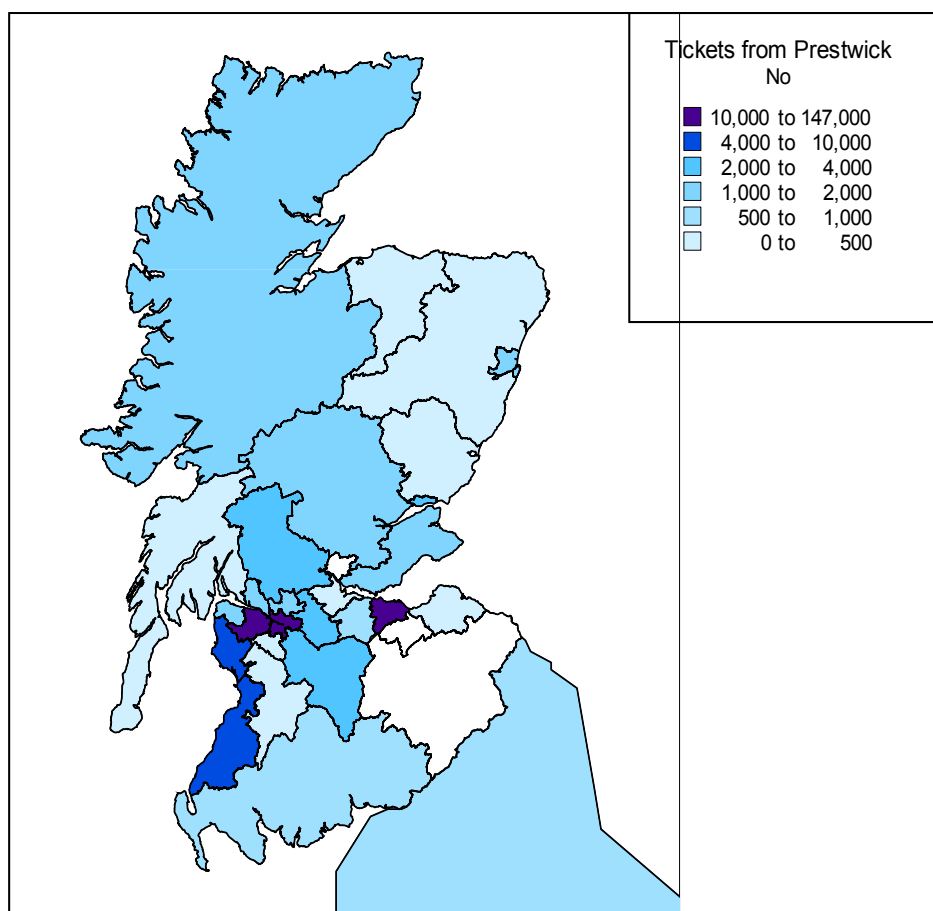
Destinations of rail passengers from Prestwick airport

3.37 Data was obtained from FirstScotrail on the destinations of passengers travelling by rail from Prestwick airport. It should be noted that this data includes both those resident in Scotland returning home and visitors to Scotland, so it is difficult to form any strong conclusions from this data with regard to visitors' travel patterns. Figure 3.13 shows a map of the destinations of passengers from Prestwick airport in the period April 2004 to March 2005. It shows that the greatest number of people travel to the cities of Edinburgh and Glasgow.

Destinations of visitors using Rosyth to Zeebrugge Superfast Ferry

3.38 The Superfast Ferry service between Rosyth and Zeebrugge was launched in May 2002. With reference to Figure 3.14, it can be seen that the Highlands is the area most visited by survey respondents, followed by Argyll, Isles, Loch Lomond and the Trossachs and Edinburgh and the Lothians. A high degree of mobility within Scotland by users of this service is apparent, who are predominantly car users as discussed in Paragraph 3.42 below. Figure 3.15 shows the locations of first and last stops and stays. For respondents in 2003, significant proportions travelled to Edinburgh and the West Highlands for their first overnight stay. A higher proportion of respondents chose to stay overnight in Edinburgh on the last night of their stay than on their first night in both 2002 and 2003.

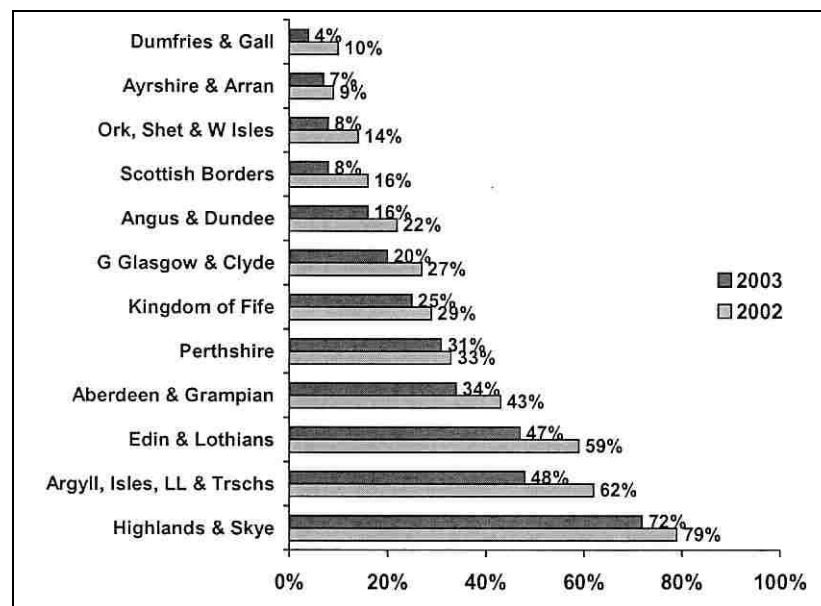
Figure 3.13 Destinations of passengers from Prestwick Airport



Notes to table

Source: First Scotrail (2006), Base data: April 2004 to March 2005

Figure 3.14 Areas of Scotland visited by overseas leisure users of Rosyth to Zeebrugge Superfast Ferry



Source: George Street Research (2003)

Figure 3.15 Locations of first and last stops and stays by leisure users of Rosyth to Zeebrugge Superfast Ferry

Base: All Respondents

Area	FIRST				LAST			
	Stop		Stay		Stop		Stay	
	03	02	03	02	03	02	03	02
%	%	%	%	%	%	%	%	%
Edinburgh	19	19	16	15	25	28	20	24
Other Perthshire	7	3	3	4	6	5	4	7
Stirling	6	8	1	5	5	4	3	5
Other West Highlands	5	2	11	5	2	1	11	4
Loch Lomond, Trossachs	4	5	6	5	3	2	4	3
Other Fife	4	5	3	3	3	7	4	4
Glasgow	4	3	5	4	2	2	5	3
Perth	4	3	1	4	4	2	2	1
Pitlochry / Loch Tummel / Loch Rannoch	4	4	3	3	2	2	3	3
St Andrews	4	2	3	3	4	3	3	2
Argyll	3	2	6	3	1	3	2	3
Culross	3	2	0	0	3	3	0	1
Other Lothians	2	4	2	5	3	5	1	6
Other East Highlands	2	3	9	9	2	2	7	6
Oban	2	1	3	3	1	1	2	1
Other Grampian	2	1	3	4	1	3	3	4
Dunkeld	2	1	1	2	1	1	0	1
Other Borders	2	1	2	2	1	1	1	1
Dunfermline	1	2	0	0	6	4	2	0
Inverness	1	3	4	2	1	1	2	2
Angus	1	2	3	2	1	0	2	1
Rosyth	1	0	0	0	5	3	0	0
Other Central Scotland	1	1	3	1	1	2	4	3
Ayrshire / Arran	1	1	1	2	1	1	2	2
Dundee	1	1	1	2	0	1	0	1
Aberdeen	1	1	1	1	2	1	1	1
Aviemore	1	1	1	0	1	1	1	2
Braemar	0	2	1	2	0	0	0	0
Dumfries	0	1	0	2	0	0	0	0

Other places were mentioned by 1% or less

Source: George Street Research (2003)

Travel mode choice within Scotland

3.39 The analysis of information available from the national entry and exit surveys shows that, with the exception of areas visited, information on travel mode choice within Scotland is confined largely to the NTS. The major limitation of using the NTS is that sample sizes for three year periods are of the order of two hundred and thus rather small to produce accurate estimates. CAAS has information on mode of travel to the airport of departure, although it is not clear what inferences can be drawn between mode choice to airport and mode choice for other travel within Scotland.

3.40 Table 3.9 shows the estimated number of long distance trips (> 50 miles) undertaken from a base inside Scotland for domestic visitors to Scotland for the periods 1992-95 to 2001-04. It is clear from Table 3.10 that car is the principal mode used by this group of visitors. It would also appear that there has been a reduction in the number of long distance trips, although it should be noted that these figures are based on small sample sizes. One hypothesis is that this reduction in long distance trips was the result of a decline in the tour bus market. However, the evidence presented in Table 3.10 does not support this hypothesis which shows mode share fairly static across the time period considered.

Table 3.9 Long distance trips from bases within Scotland

	1992 - 95	1995 - 1998	1998 - 2001	2001 - 2004
Trips (million)	4.05	5.38	4.39	2.56

Notes to table

Base data: NTS 1992 - 2004

Table 3.10 Percentage mode share for long distance trips within Scotland

	1992-95	1995-98	1998-01	2001-04
Car	72	72	71	75
Lorry	3	1	0	1
Tour Bus	21	21	19	21
Express Coach	2	1	0	0
Rail	1	4	10	4
Air	0	0	0	0
Other	1	0	0	0

Notes to table

Base data: NTS 1992 - 2004

3.41 Figures 3.16 to 3.19 show the final mode of travel used by departing overseas visitors to reach Aberdeen, Edinburgh, Glasgow and Prestwick airports respectively. The proportion of passengers travelling by private transport – that is, hire car or car drop-off – is fairly consistent across these airports (between 34% and 44%). Far fewer visitors choose a taxi or minicab to travel to Prestwick airport than elsewhere, and the popularity of using the train to travel to Prestwick is clearly demonstrated. Glasgow and Edinburgh airports, which do not enjoy rail links at present, have smaller proportions using public transport (18% and 33% respectively) than Prestwick airport (43%).

3.42 Table 3.11 shows the travel mode of overseas leisure visitors to Scotland using the Rosyth to Zeebrugge Superfast Ferry service. Not surprisingly, nearly all visitors used a car whilst in Scotland. It is worth noting that significant percentages also report using other modes. Train and bus modes were used by just under 10% of visitors and the popularity of visiting the islands of Scotland is evidenced by the large proportion of visitors using ferry / boat / yacht.

Table 3.11 Overseas leisure visitors' travel mode in Scotland: Superfast Ferry

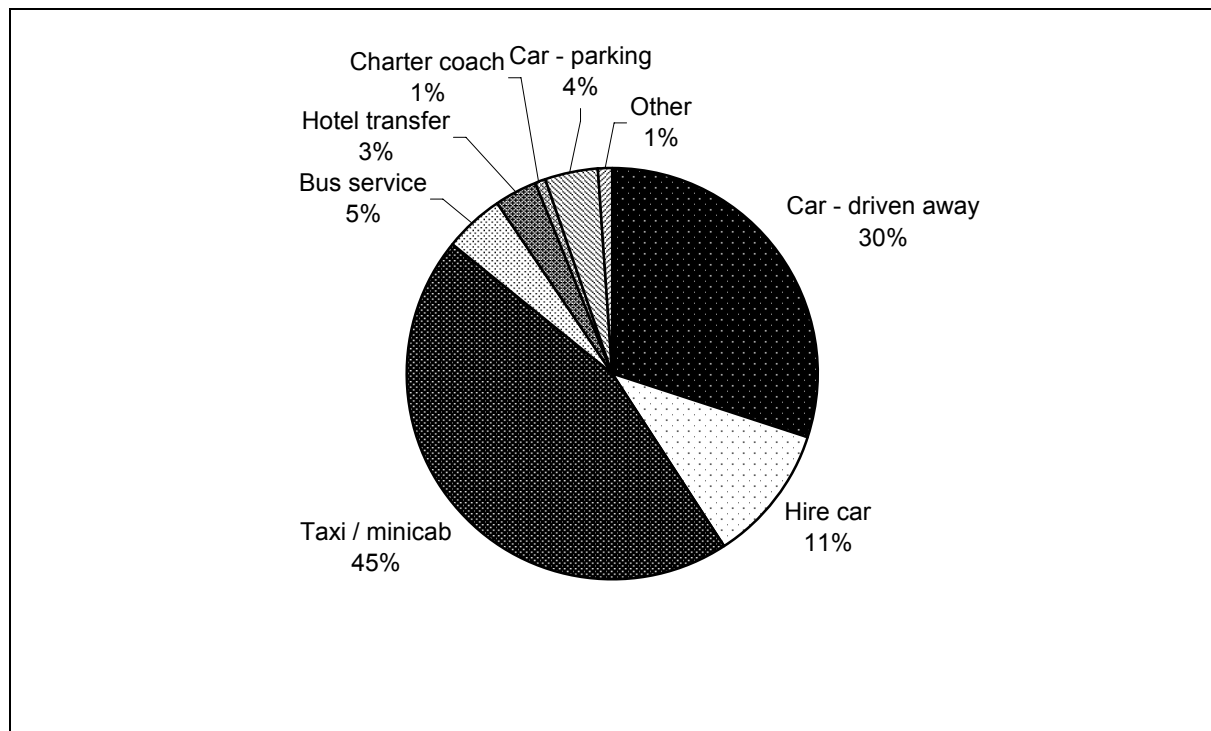
	Overall	Belgium	France	Germany	Other Europe
	03	03	03	03	03
Base: All respondents	(340)	(104)	(58)	(106)	(68)
	%	%	%	%	%
Car	90	87	97	88	94
Ferry / boat / yacht	33	24	26	38	41
Foot / walking	29	22	36	31	32
Train	8	9	9	7	7
Bus	8	5	12	8	9
Motor-bike*	5	10	-	1	1
Cycle	4	4	2	5	6
Coach	3	3	5	2	1
Plane	1	2	2	1	-
Campervan / Caravan*	1	1	-	5	3

* neither of these options were prompted

Notes to table

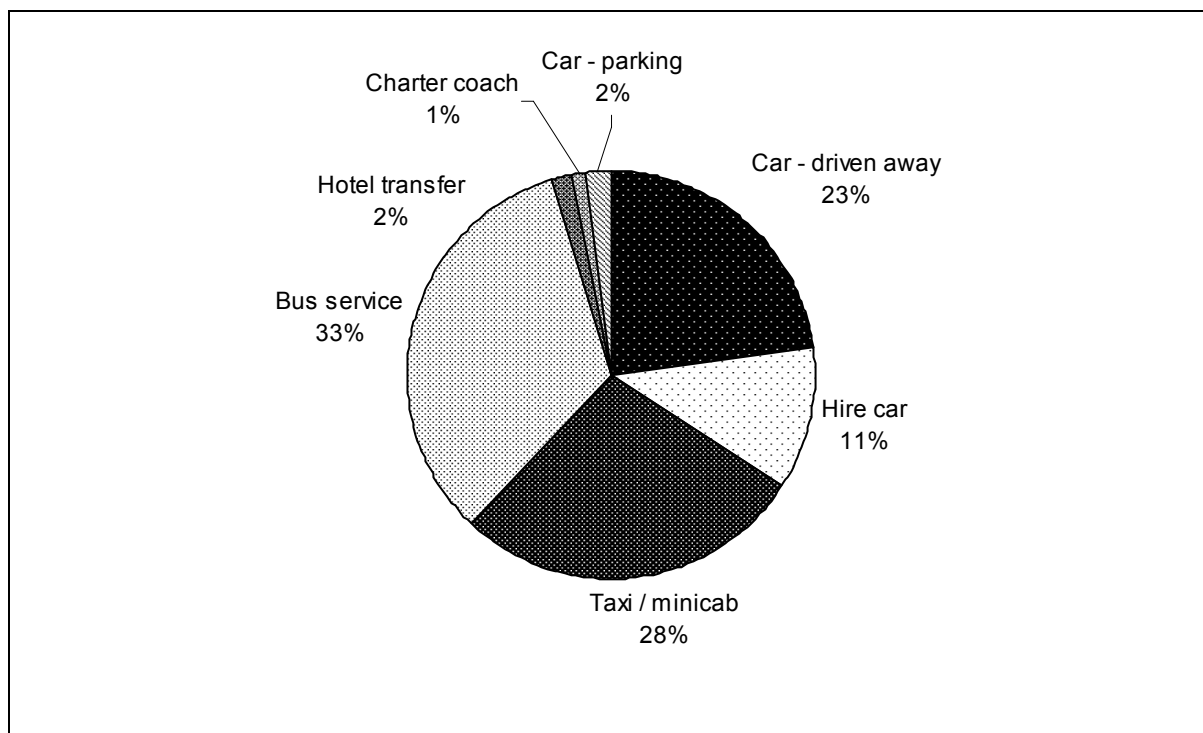
Source: George Street Research (2003)

Figure 3.16 Final mode of travel to Aberdeen airport (overseas visitors) (2005)



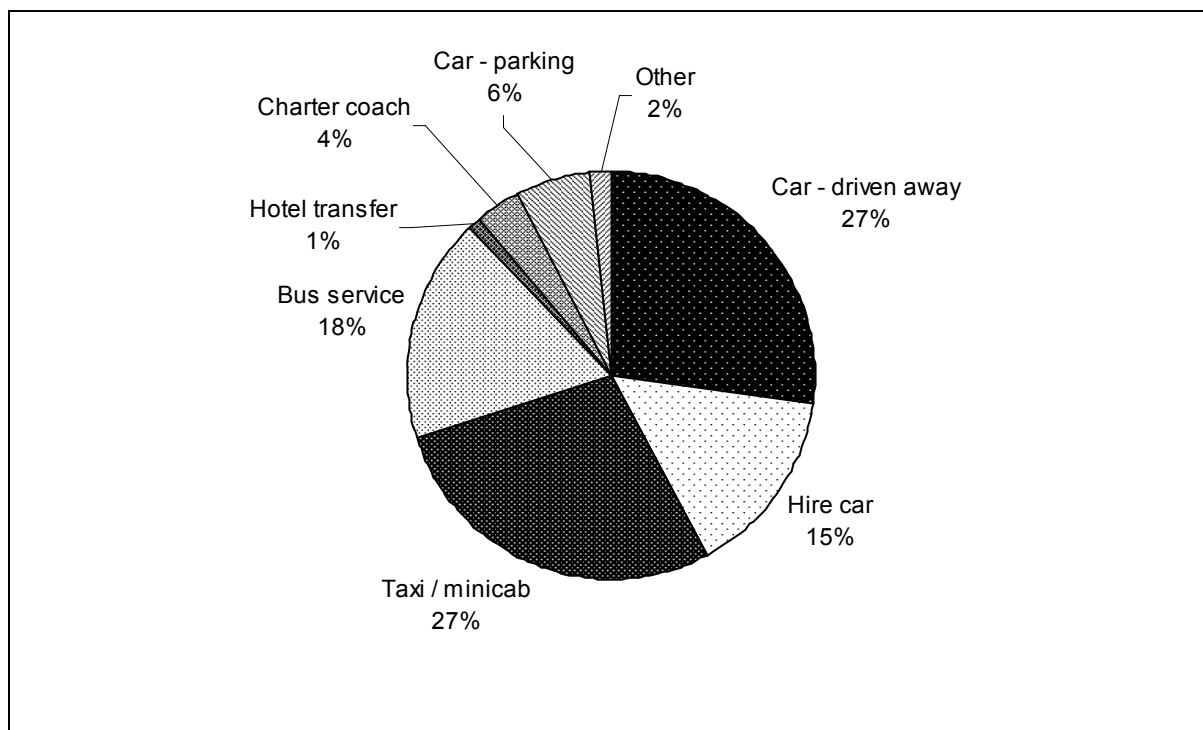
Source: VisitScotland (2006d), Base data: CAAS 2005

Figure 3.17 Final mode of travel to Edinburgh airport (overseas visitors) (2005)



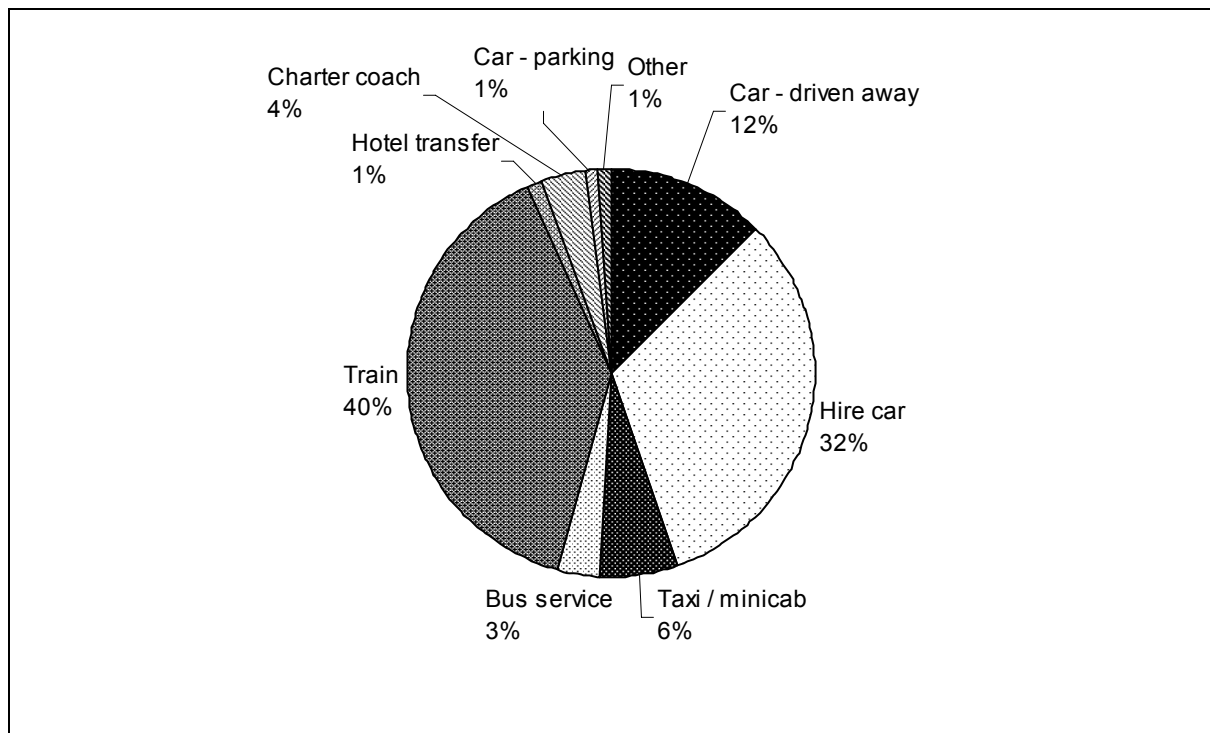
Source: VisitScotland (2006d), Base data: CAAS 2005

Figure 3.18 Final mode of travel to Glasgow airport (overseas visitors) (2005)



Source: VisitScotland (2006d), Base data: CAAS 2005

Figure 3.19 Final mode of travel to Prestwick airport (overseas visitors) (2005)

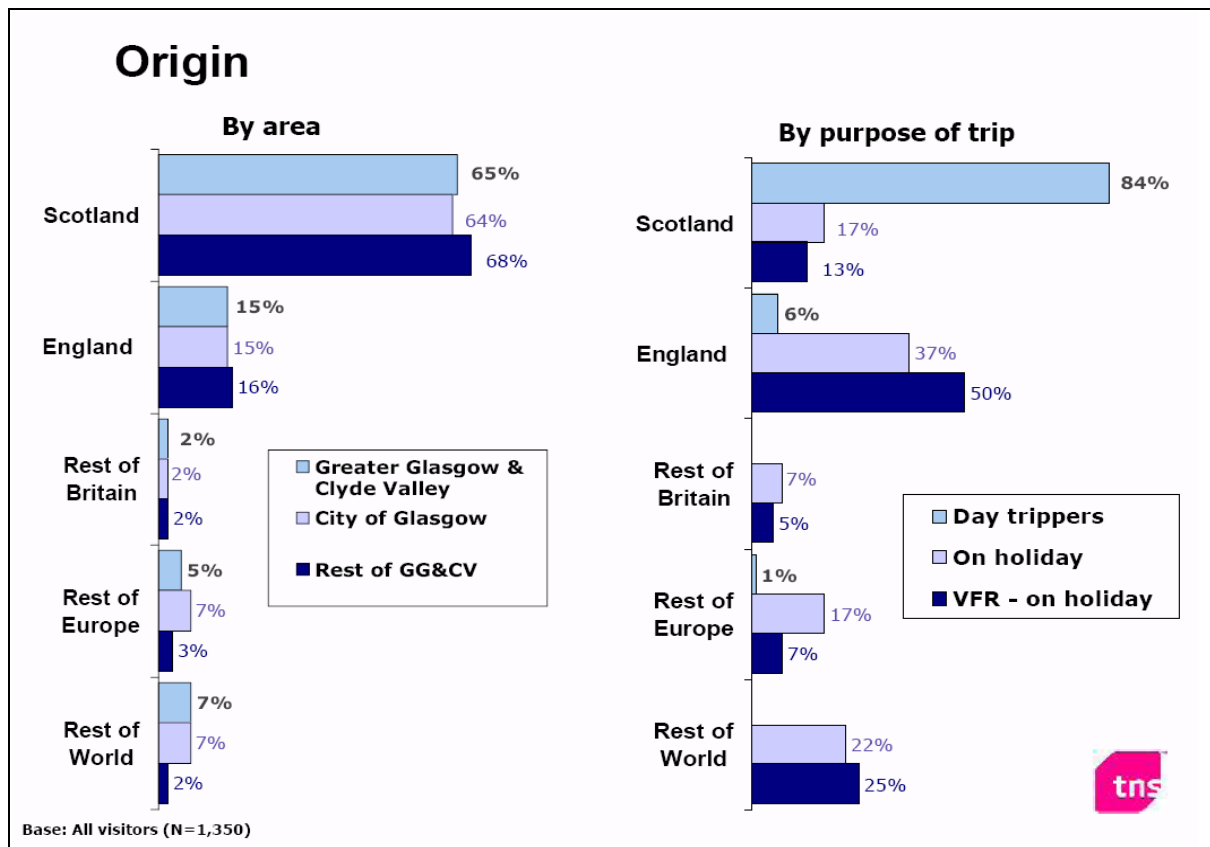


Source: VisitScotland (2006d), Base data: CAAS 2005

Greater Glasgow and Clyde Valley Visitor Survey 2003-04 (TNS, 2004)

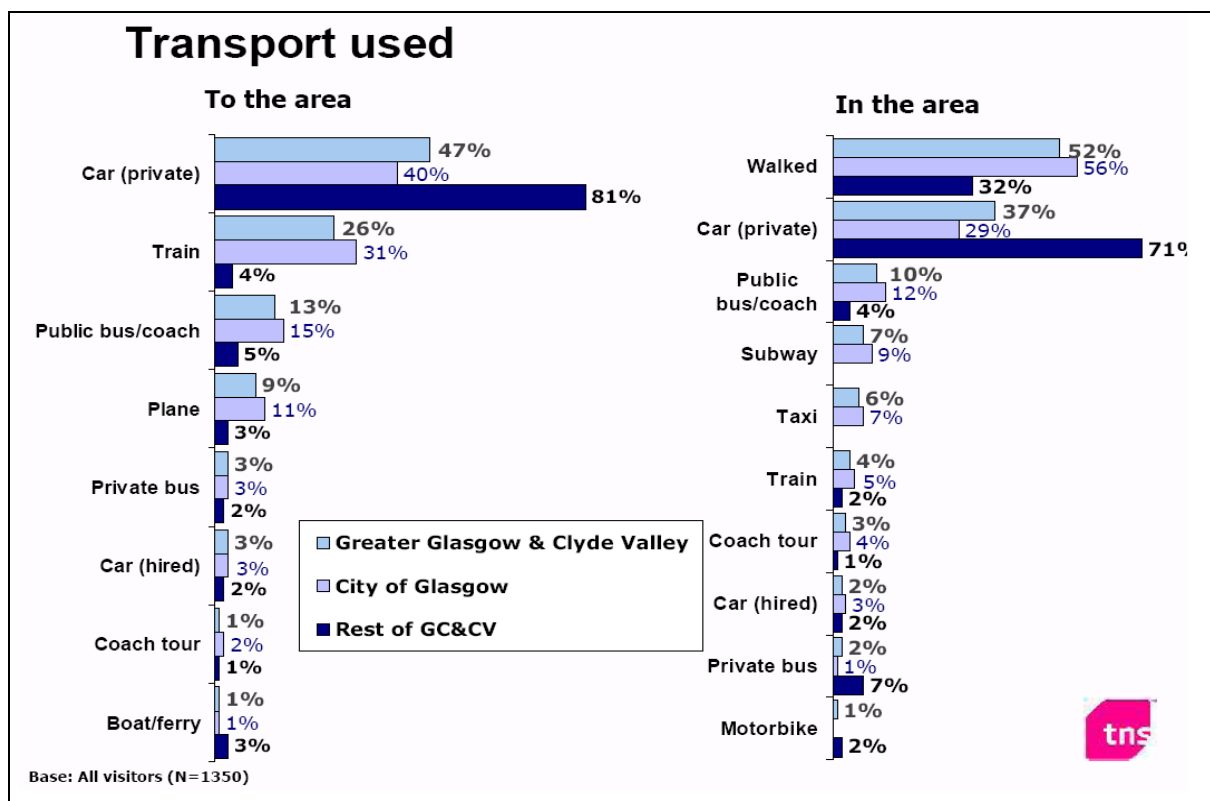
3.43 The above research encompassed all visitors and day-trippers to Greater Glasgow and Clyde Valley area. Those respondents resident in Scotland (but outside the study area itself) comprised 65% of respondents and fall outside the scope of the current study (see Figure 3.20). 17% of respondents came from the rest of the UK and 12% of respondents were overseas visitors. Figure 3.21 shows transport mode used to travel to the area and transport mode used within the area by respondents. Not surprisingly, private car is used less to travel to the centre of Glasgow than to the rest of the area given the attractiveness of public transport options to the city of Glasgow relative to the car. Furthermore, the importance of walking as a mode of transport within Glasgow comes out strongly in these results. It is, however, impossible to draw any firm conclusions from the reported results about the travel behaviour of visitors to Scotland to and within the study area given the large number of Scottish respondents within the sample.

Figure 3.20 Origin of visitors to Greater Glasgow and Clyde Valley



Source: TNS (2004), Base data: All respondents

Figure 3.21 Transport used to and within Greater Glasgow and Clyde Valley



Source: TNS (2004), Base data:: All respondents

Chapter summary and conclusions

3.44 This chapter has examined a number of surveys and studies conducted at a national level or on specific routes into or within Scotland in order to explore what they tell us about patterns of travel behaviour of visitors to Scotland and to enable limitations in existing data and gaps in knowledge to be identified. A framework is presented which reviews the scope and quality of these data sets. It is clear that, whilst a great deal of reliable information is available on the origins and basic socio-economic characteristics of domestic and overseas visitors, port of entry (in relation to overseas visitors), mode of travel to Scotland or the UK and visit purpose and length, little is known about the travel patterns of visitors within Scotland from these sources.

3.45 The data sets reviewed in this chapter reveal that the majority of domestic visitors arrive in Scotland by car, although the proportion of those travelling by air and, to a lesser extent, by train, increases for those travelling from more remote origins in the UK. Air travel is the predominant mode of travel to the UK for overseas visitors to Scotland. Less than one fifth of overseas visitors to Scotland arrive in the UK using sea ports and the Channel Tunnel.

3.46 There is only limited data on mode of travel within Scotland. It is generally assumed that those arriving by car (domestic and overseas) will use their car within Scotland. This is no doubt true, but it is worth noting that a significant proportion of car users also report using some other form of transport during their stay in Scotland, as evidenced by the Rosyth to Zeebrugge Superfast Ferry study which found that 33% of respondents used a ferry or boat and 8% used the train and the Greater Glasgow and Clyde Valley Visitor Survey which showed a smaller number of respondents used a car during their visit to the study area in comparison with the number of respondents who used a car to travel to the area.

3.47 A large percentage of overseas visitors choose public transport to travel to the departure airport - 40% in the case of Prestwick airport which has its own dedicated railway station). This clearly demonstrates the important role played by the public transport system for this particular journey. Whether or not it is indicative of a more widespread use of public transport by overseas visitors during their stay in Scotland is not known.

3.48 There is evidence of a change in the visitor market having occurred in recent years with a rise in the number of overseas visitors and the time they spend in Scotland, accompanied, possibly, by a reduction in the size of the domestic market. This change has no doubt been driven, to a large extent, by the availability of low cost flights within Europe. The impact this may have on the travel behaviour of visitors in Scotland is worthy of consideration. Most obviously, this may result in an increase in the number of overseas visitors who do not, by and large, arrive with their own means of transportation and places more importance on the quality of transport service provision within Scotland. The scope and limitations of transport provision and issues relating to visitor experience of the transport system are considered in Chapters 4 and 5 respectively of this report.

3.49 Edinburgh and the Lothians is the most popular destination within Scotland followed by Greater Glasgow and the Clyde Valley and then the Highlands and Skye for both domestic and overseas visitors. Domestic and overseas visitors using Prestwick airport exhibit higher degrees of mobility and dispersal than visitors using other airports. Further analysis of the origin, socio-economic characteristics and trip purpose of visitors may offer some explanation of this phenomenon.

CHAPTER FOUR SCOPE AND LIMITATIONS OF TRANSPORT PROVISION FOR VISITORS TO SCOTLAND

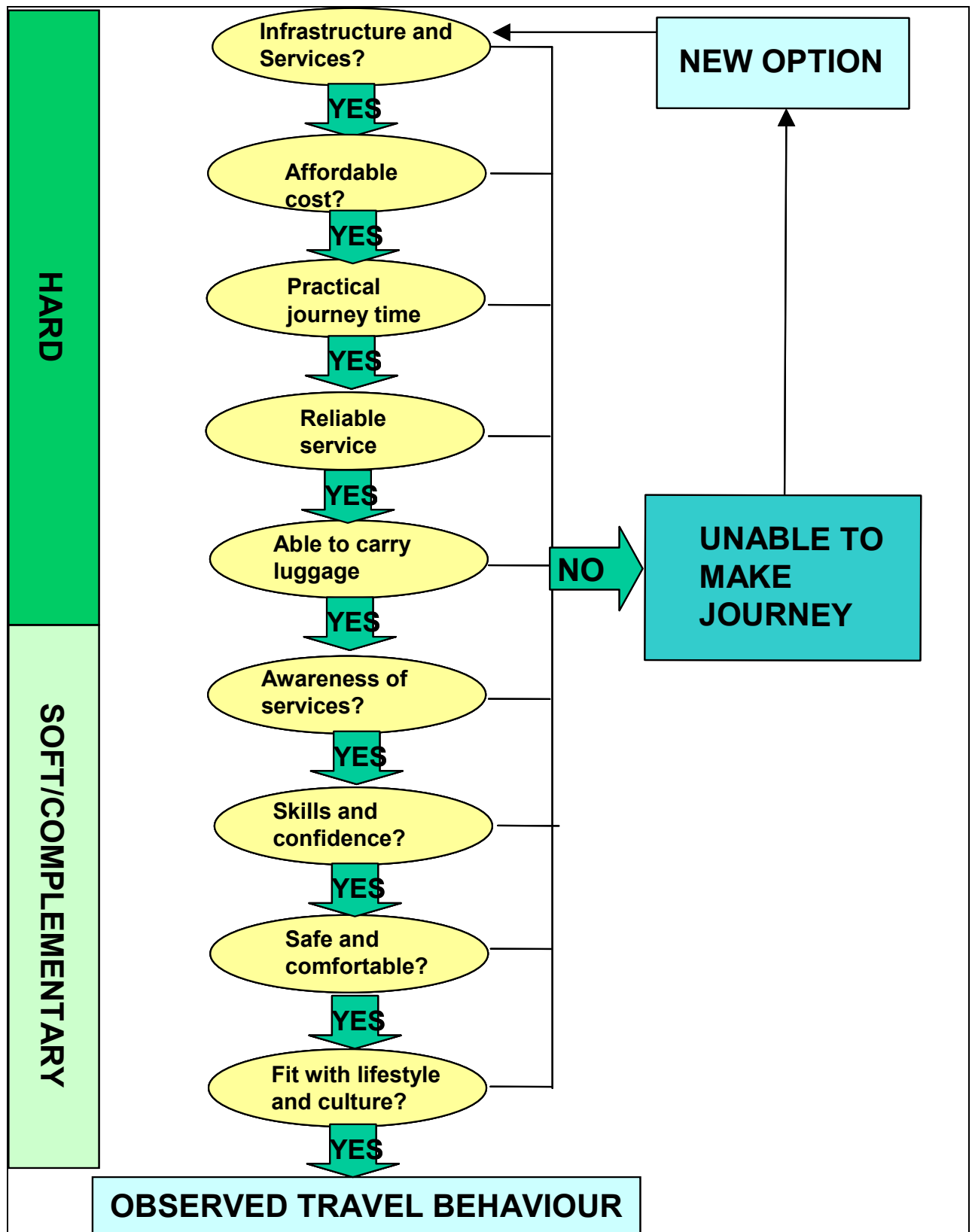
Background: Accessibility of the tourism product

4.1 The importance of accessibility of the tourism product is undisputed. Law (2002) notes that travel within a destination involves at least two aspects. Visitors firstly undertake a journey from the point of entry to their accommodation (in the case of staying visitors) and secondly move around the destination itself. There are various scenarios with regard to destination transport use by the visitor, depending on a multitude of diverse demand side factors such as mode of arrival (with or without car), purpose of trip (leisure or business), size of party and trip itinerary, which will affect travel behaviour. In terms of supply side factors, components of the tourist travel product all need to be conducive to travel for the travel option to be selected by the tourist. Simply providing infrastructure and services will not mean that the journey can always be made. Hard factors such as cost, time, and reliability are pre-requisites for a journey option but many soft and complementary factors also need to support the journey choice as shown in Figure 4.1. Thus, the overall accessibility of the tourism product is the key.

4.2 Ashworth and Tunbridge (1990) stated that the spatial behaviour of urban tourists is controlled in part by the availability and accessibility of various modes of transport. This opinion is shared by Jansen-Verbeke (1988) with regard to urban destinations.

“The attraction of visitors to the inner city will always be conditioned by the constraints of accessibility. This includes not only the possibilities offered by public transport but also the parking facilities, their location and capacity, and routes for car traffic.” (Jansen-Verbeke, 1988:57).

Figure 4.1 Model of tourist travel behaviour



4.3 Timmermans and van der Heijden (1987) have shown that distance is the most frequently cited attribute affecting decision-making when choosing recreation objects (attractions). Transport availability at a destination may have an effect on perceived distance of recreation objects. Thus, available transport supply may influence visitor travel behaviour in terms of the areas of the destination they elect to visit. Where the public transport network does not adequately serve the web of attractions within a destination, some attractions may be perceived as inaccessible to visitors, particularly those without access to a car. For those visitors who do arrive by car or elect to hire a car at the destination, a good circulatory system, ample car parking and a general lack of congestion is important (Law, 1993). High-quality signposting within the destination is valuable for directing tourists, including those who wish to walk or cycle between tourist attractions and facilities.

4.4 This chapter of the report is concerned with examining how well the elements of Scotland's tourism product are linked. It commences with an overview of tourist transport supply in Scotland. Subsequently it explores the degree of usage by visitors to Scotland of a variety of modes of transport, including those dedicated for tourist purposes. Conclusions on the scope and limitations of transport provision for visitors to Scotland are drawn.

Tourist transport in Scotland

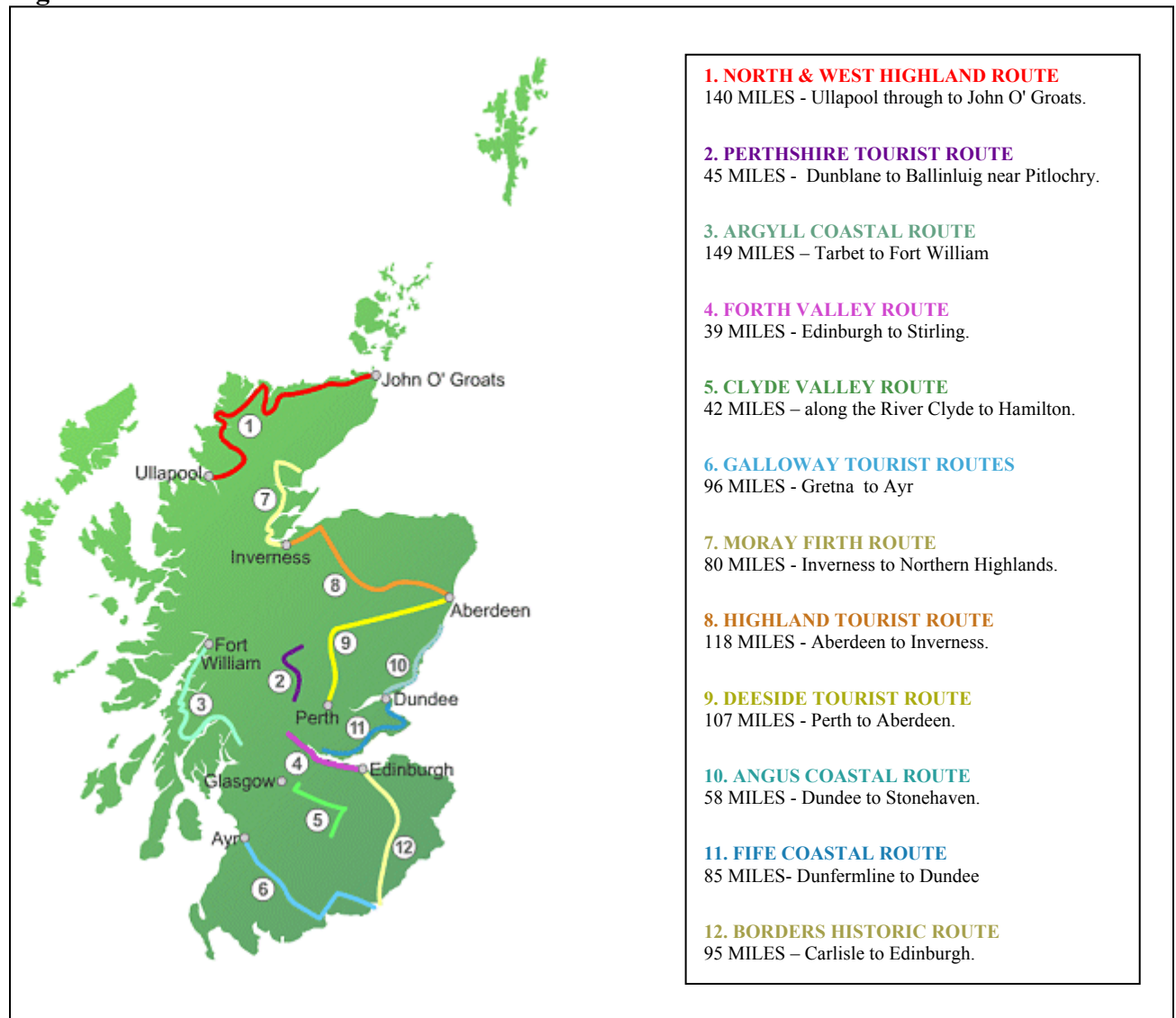
4.5 It has been noted throughout this report that road transport is the dominant form of visitor transport in Scotland, particular for domestic visitors. Considering the characteristics of Scotland as a primarily rural and sparsely populated destination and the car-centric government transport policies that have been predominant over the past sixty years, this is hardly surprising. Whilst those visitors who choose to travel around Scotland by public transport remain in the minority, there is some evidence that improvements to Scotland's external accessibility by rail and air may be increasing the requirement for public transport use at the destination, particularly among visitor from overseas. The Scottish Executive has been proactive in increasing the number of direct flights to Scotland from overseas, and more recently to Scottish Islands. Moreover, Scotland is one of few countries in Europe which is currently creating new rail routes. Future development of the rail network will be facilitated through the recent transfer of rail powers from Westminster to Holyrood. However, problems of integration within the public transport network still arise due deregulation. Innes (1998) notes that this presents a problem particularly in the North and West of Scotland where there is fairly extensive use of public transport by visitors and a high requirement for inter-modal changes.

Road transport for tourism

4.6 Scotland has a largely adequate road network for tourist purposes, with good quality roads providing access to most parts of the country. With the exception of the Glasgow and Edinburgh conurbations and some key leisure routes at peak periods, there is little road congestion. Innes (1998) argues that the single track roads found in the North West of the country add to Scotland's appeal as a visitor destination. Whilst this may be true, these roads are perhaps unsuitable for the sizeable coach tour market. There are twelve National Tourist Routes in Scotland, which act as an alternative to the main trunk roads and motorways. The routes are well signposted and, according to the promotional literature, are selected and created to exhibit the diverse landscapes of Scotland and to provide access to a variety of visitor attractions and facilities. As can be seen from Figure 4.2, these routes are well

distributed throughout the country, no doubt for political and economic reasons. The Malt Whisky Trail in Moray is a further example of a successful, local tourist road trail.

Figure 4.2 Tourist routes in Scotland



4.7 Signposting will be identified as a key factor in enhancing visitor satisfaction with road travel in Scotland in Chapter 5 of this report. Moves towards providing clearer signage for tourists, with the ultimate aim of improving the visitor experience, are evidenced by a recent consultation document circulated by the Scottish Executive in November 2005 (Scottish Executive, 2005). The document outlines the need to provide clear and consistent directions for visitors, enabling them to reach their destination safely and enhancing road safety. It recognizes that adequate signage is a means of reducing navigation problems for the visitor and that signposting is a key tool in traffic and visitor management. The role of signage as a tourist information tool and the importance of continuity are also stressed. A key issue here, however, is the requirement for applicants (normally tourist attractions or facilities) to individually finance the cost of providing and maintaining signs. The report on the consultation process is expected to be produced in August 2006.

Public transport and tourism

4.8 Rail travel was crucial to the early development of tourism within the UK and Scotland's railways still play an integral role in transporting tourists around the country. Buses, meanwhile, offer access to a much wider range of destinations and remote areas. Innes (1998) argues that price and quality of rail transport in Scotland has prevented any feasible promotion of the use of rail for tourism. However, Scotland has a number of scenic railway routes which are well known by rail enthusiasts throughout the world (as evidenced by the private rail tours that make use of these routes) and there is scope for further capitalising on the appeal of this form of travel. Visit Scotland provides on its website a car-free itinerary for visitors, as illustrated in Figure 4.3 and the former Scotrail website published tourist guides to several of the most famous and picturesque railway lines, such as the West Highland Line. This does not appear to have been continued by the new holders of the franchise, FirstGroup plc. Route guides for some of the Scottish Railways are also available for the enthusiast via such websites as <http://www.lawrieweb.com/>. Bus services tend to be favoured as a means of budget travel and, although seldom promoted as a form of leisure travel, their importance should not be underestimated. Services such as the Trossachs Trundler have been viewed as highly successful, and there have been attempts to replicate this type of service in other areas of rural Scotland. Meanwhile, private coach companies, such as Rapsons, which offer both scheduled and private hire services, provide an important transport mode for group tours. Buses are also important for the independent traveller in the form of tourist outings and 'backpacker's buses', such as Haggis Backpackers and MacBackpackers.

Figure 4.3 See Scotland without a car

Enjoy the freedom of a holiday in Scotland without the car where you let someone else do the driving so that you can watch the spectacular scenery! Scotland has an excellent transport system, with fast rail and bus links to the main Scottish cities as well as good connections to the smaller towns and rural areas. A comprehensive ferry network serves the islands of the west and north, while combined travel passes offer flexible ticket options on ferry, bus and train. Many remote areas are served by passenger-carrying postbuses.

Start your journey in Edinburgh with the excitement of crossing the awesome Forth Bridge by train. Dramatic coastal scenery brings you to Aberdeen. Then head west, stopping off at Keith on the Malt Whisky Trail to visit Strathisla Distillery. Continue to Inverness, with its Loch Ness cruising options. From here, take Britain's most northerly railway across wild moorland - great for bird watching - to the Caithness coast. Catch a ferry from Scrabster to Orkney to explore its scenery and archaeology and marvel at the spectacular cliff scenery en route.

An alternative route from Inverness takes you west on the famous Kyle railway line for the Isle of Skye. From the north, change at Dingwall for the train going west. The station here has a tearoom at one end of the platform and a pub at the other - ideal while you wait for your connection! When you reach Kyle of Lochalsh, a bus service connects to Armadale on Skye where you can catch a ferry back to the mainland at Mallaig. From Inverness, you can also catch the bus south-west to Fort William past Loch Ness, and with someone else driving, you can keep your eyes peeled for the monster! Use Fort William as a base and take the train north-west to Mallaig where mountains, pure white beaches and island views make this one of the most spectacular railway journeys in the world. Steam trains travel this route in the summer months adding to the romance of the experience. En route, call at the highland village of Arisaig for delightful day cruises to the Small Isles.

Go south from Fort William to Crianlarich and change here for Oban, an attractive west coast town and gateway for islands such as Mull. On Mull you can journey to a romantic castle via a narrow gauge railway. Head south from Oban to Glasgow passing the broad expanse of Loch Lomond en route. Explore the lively and cosmopolitan metropolis before heading south to Ardrossan with its ferry to the Isle of Arran. Alternatively, from Glasgow, fly to the beautiful island of Barra where the plane lands on the beach - with the tide out, of course! You can also sail to Barra from Oban. Or you could continue south from Glasgow to Dumfries and Galloway to enjoy the beautiful hill country and forest parks. You can travel by bus from Dumfries or by rail and bus from Glasgow to Stranraer in the far southwest where there are good ferry connections to Larne and Belfast in Northern Ireland. There is also a good rail and bus service from Glasgow to Edinburgh via Stirling - one of Scotland's most historic towns.

Source: <http://www.visitscotland.com/aboutscotland/explorebymap/highlands/seescotlandwithoutacar>

4.9 The provision of special tickets for the visitor is an important factor in promoting tourist use of public transport. First Scotrail provides three main tickets aimed at tourist travellers:

- Freedom of Scotland travel passes allow either 4 out of 15 consecutive days travel for £96, or 8 out of 15 consecutive days travel for £130. Travel is allowed on certain trains, buses and ferry services.
- The Central Scotland Rover Ticket allows 3 out of 7 days unlimited travel for £31.
- The Highland Rover Ticket allows 4 out of 8 consecutive days travel for £62.50.

4.10 Rapsons Coaches offer three separate three-day Rover tickets for Skye, Orkney and the very North of Scotland (Groats) and a one-day Rover for the Highlands area around Inverness. Similar day tickets are available within urban areas, such as the First All Day Ticket which, although not designed for tourists, may be used by them. A further tourist ticket is offered by the backpackers' buses which offer 2, 3, 5 and 7 day 'jump on jump off' tickets. These services allow budget travellers to board and alight at will over long distance journeys though Scotland from the Highlands to the West Coast and will drop tourists at various hostels, with other frequent stops in between. The services of a tour guide are normally included.

4.11 Ferry travel is also key for tourism purposes in Scotland due to the attraction of the islands for visitors. Caledonian MacBrayne is Scotland's largest ferry operator, serving the Hebrides and the islands of the Clyde. Northlink Orkney and Shetland Ferries operate three passenger ships transporting visitors and islanders between Orkney, Shetland and the Scottish Mainland. Western Ferries offer a service from Gourock to Dunoon. As highlighted above, some integrated ticketing is available for bus, ferry and rail. A case study of the degree of integration of ferry travel with other modes is presented below for the example of a trip to Skara Brae in the Heart of Neolithic Orkney UNESCO World Heritage Site

Case Study 4.1 Skara Brae

Situated 31 km North West of Kirkwall, Skara Brae overlooks the Atlantic Ocean at the Bay of Skail on the west coast of Orkney's Mainland (The Orcadian 2003). The well preserved remains of the Neolithic settlement were exposed following a storm in 1850 and excavation has since revealed evidence of occupation on the site from around 3100 to 2500 BC (Historic Scotland 2006a). As a visitor attraction in the care of Historic Scotland, Skara Brae comprises the excavated remains of the Stone Age village, a replica house, café, shop and visitor centre displaying artefacts recovered from the site (Historic Scotland 2006b). The preservation and socio-historical significance of the site, which attracts an estimated 55,000 visitors a year (The Orcadian 2003), justifies the inclusion of Skara Brae on the World Heritage List as part of the 'Heart of Neolithic Orkney' (Historic Scotland 2006a)

At latitude 59 degrees north the Orkney Islands are situated off the North Coast of Scotland where the Atlantic Ocean meets the North Sea. British Airways scheduled flights, operated by Loganair Ltd fly to Kirkwall with daily departures from Glasgow, Edinburgh, Aberdeen and Inverness airports (Orkney Islands Council 2006). However, flights to the Scottish Islands are often perceived to be expensive and as such may be outwith the budget of many visitors, especially families visiting with multiple passengers.

It is also possible for visitors to travel to Orkney by sea. Northlink Orkney and Shetland Ferries Ltd currently operate a three times weekly service (increasing to four weekly sailings during peak season) between Aberdeen and Kirkwall. The sailing takes around six hours, departing Aberdeen at 17.00 and arriving in Kirkwall 23.00 Thursday, Saturday and Sunday evenings. Northlink also operate several crossings a day on the shorter route between

Scrabster and Stromness, again with increased service during peak season. Peak season fares for single passage start from £14.80 per person between Scrabster and Stromness and £23.80 per person between Aberdeen and Kirkwall. Whilst the transportation of vehicles increases fares, bicycles can be transported at no extra cost (Northlink Ferries 2005).

Various modes of transport are available to visitors wishing to travel from Scotland's principle cities in the central belt to the northern airports and ferry terminals from which it is possible to access Orkney and popular attractions such as Skara Brae.

By car, Aberdeen is around 144 miles from Glasgow and 130 miles from Edinburgh. The journey, along motorways and A Class roads, is estimated to take around three and a half hours (RAC 2006). To Inverness, and onwards to the ferry terminal at Scrabster, the main approach from both Edinburgh and Glasgow follows the A9 from Perth (VisitOrkney 2006a). The journey to Inverness is estimated at around three hours fifty minutes from Edinburgh and four hours twenty minutes from Glasgow (RAC 2006). It is a further 111 miles through the Scottish Highlands from Inverness to Scrabster (VisitOrkney 2006a).

Intercity coach services are operated by Scottish Citylink and Megabus. There are fifteen direct services a day operating between Glasgow's Buchanan Street bus station and Aberdeen bus station, from which it is only a short walk to Commercial Quay and the Northlink Ferry terminal. There are also many daily services operating between Glasgow and Inverness, of which three are direct links and others require passengers to change service at Perth (Scottish Citylink 2005a/b). Frequent direct services, eleven or twelve per day, operate between Edinburgh and Inverness while coaches also regularly depart Edinburgh on an indirect route to Aberdeen via Perth (Scottish Citylink 2005c/d).

Upon arrival in Inverness, coach passengers wishing to sail with Northlink to Orkney will be required to board a connection to Scrabster. Four daily bus services between Inverness and Thurso are provided by Scottish Citylink, two (one on a Sunday) of which continue to Scrabster to connect with the Northlink Ferry at 19.00 hours (Scottish Citylink 2006).

First ScotRail offer the majority of train services between the central belt and the Scottish Highlands although GNER and Virgin Trains also operate on some routes. ScotRail currently operate around one service an hour between Glasgow Queen Street and Aberdeen (First ScotRail 2005a) and a service of similar frequency between Edinburgh and Aberdeen (First ScotRail 2006). In both cases a reduced service operates on a Sunday. Rail services to Inverness are less frequent with six daily services departing from Edinburgh and three from Glasgow. For visitors wishing to travel by train before boarding the ferry at Scrabster, services continuing from Inverness to Wick are very limited with only one daily service from Glasgow arriving in time for passengers to board a country bus connection and meet the final Northlink Ferry crossing of the evening at 19.00 hours (First ScotRail 2005b).

Bus and rail timetables are readily available from stations and travel information can also be found online at www.traveline.com and www.transportdirect.info

Within Orkney itself, a range of transport options are available to visitors wishing to travel around and between the islands, however services are often limited. Public transport information detailing timetables for all modes of public transport, including the airport bus service, internal and external air and ferry routes, are available online from the Orkney Islands Council. Timetables highlight bus services that connect with Northlink Ferry

departures and arrivals. However, it should be noted that buses will only delay departure, for a limited period (around fifteen minutes), to await the arrival of final Northlink ferry of the evening at Stromness (Orkney Islands Council 2006).

Owing to its location north of Stromness, Skara Brae may prove problematic for visitors to access. A regular bus service operates between principle commercial settlements of Kirkwall and Stromness Monday to Friday with a slightly reduced service operating on a Saturday and Sunday (Orkney Islands Council 2006). However, public transport options to Skara Brae itself are very limited and tourist information directs visitors towards the use of a private/ Hire car, taxi or bicycle. The Tourism and the Environment Forum highlights the achievements of Skara Brae under the Green Tourism Business Scheme by noting the provision of onsite parking facilities for cyclists (Tourism and the Environment Forum 2003). Directions to Skara Brae can be found on the website of VisitScotland but, surprisingly, travel information is absent from Historic Scotland web pages concerning the monument.

For those considering hiring a car during their stay in Orkney, through preference or necessity, a promotion offering a discounted rate of vehicle hire is currently advertised to visitors browsing the website of VisitOrkney (VisitOrkney 2006b).

A further option for visitors wishing to experience a trip to Skara Brae is to join an organised tour such as the GO-ORKNEY MEGATOUR 2006 day trip advertised by Puffin Express. The tour, costing £59 plus admission fees, departs from Inverness and travels north to Gillis Bay sailing with Pentland Ferries to St Margaret's Hope on South Ronaldsay. The tour visits Orkney's top visitor attractions and Neolithic monuments and includes a one hour stop at Skara Brae before returning to Inverness (Puffin Express 2006).

Data on visitor use of non- tourist dedicated modes of transport

4.12 Chapter 3 of this report has provided an overview of patterns of travel behaviour in Scotland at national level. Within this section, we hope to enhance this picture by reviewing data from visitor attractions on mode of arrival. Mode of travel to attractions is not currently explored by the Visitor Attraction Monitor and when it was, in 2000, the information was requested from attractions managers rather than the visitors themselves. For the purpose of this report, therefore, the most popular paying and non paying visitor attractions in Scotland were contacted and asked to provide a modal breakdown of how visitors travelled to the attraction, where this information was available. In many cases the data could not be provided, however key organisations such as the National Trust for Scotland, Scottish National Heritage and Historic Scotland were able to provide data for many of their attractions. In addition, a response was received from several other attractions. This information has been collated and compared below. Where more detailed information on modal choice is available, this is also provided.

National Trust for Scotland (Lyn Jones Research Ltd, 2005)

4.13 The data presented below identifies mode of transport used by visitors from outside Scotland to travel to National Trust properties in Scotland. Data is taken from the National Trust for Scotland Visitor Survey 2005 undertaken by Lynn Jones Research Ltd. In the original visitor survey report (Lyn Jones Research Ltd, 2005a) data is not disaggregated by origin of visitors. However, this data was obtained from the contractor for the purposes of this report. The total number of respondents varies for each property and, due to the small (and in some cases, very small) sub-subsets, the data presented here should be viewed as being indicative only. A breakdown of transport used by overseas country is presented for those countries represented by 10 or more respondents.

Table 4.1 Visitors to Crathes by mode 2005

	Origin		
	Scotland	England / Wales / N. Ireland	Overseas
Mode	N=120	N=62	N=117
Private car	96%	84%	24%
Hired car	1%	11%	54%
Private coach	3%	3%	12%
Public bus	1%	0	7%
Camper van/Motor home	0	2%	3%
Bicycle	0	0	2%
Other misc. modes	0	0	2%

Table 4.2 Overseas visitors Crathes by mode 2005

	Overseas Origin			
	Italy	USA	Germany	France
Mode	N=20	N=15	N=15	N=14
Private car	10%	13%	40%	29%
Hired car	80%	53%	40%	43%
Private coach	0	27%	0	21%
Public bus	5%	7%	13%	7%
Camper van/Motor home	5%	0	7%	7%
Bicycle	5%	0	0	0

Table 4.3 Visitors to Culloden by mode 2005

	Origin		
	Scotland	England / Wales / N. Ireland	Overseas
Mode	N=67	N=92	N=139
Private car	84%	64%	18%
Hired car	6%	16%	43%
Private coach	9%	13%	29%
Public bus	1%	2%	2%
Camper van/Motor home	1%	2%	4%
Bicycle	0	1%	3%
Other misc. modes	0	1%	1%

Table 4.4 Overseas visitors to Culloden by mode 2005

	Overseas Origin			
	USA	Australia	Germany	Canada
Mode	N=41	N=31	N=19	N=16
Private car	2%	16%	32%	6%
Hired car	46%	45%	32%	63%
Private coach	44%	29%	11%	25%
Public bus	5%	0	0	6%
Camper van/Motor home	0	6%	16%	0
Bicycle	2%	3%	5%	0
Other misc. modes	0	0	11%	0

Table 4.5 Visitors to Culzean by mode 2005

	Origin		
	Scotland	England / Wales / N. Ireland	Overseas
Mode	N=156	N=82	N=61
Private car	90%	77%	52%
Hired car	2%	4%	33%
Private coach	3%	15%	7%
Public bus	3%	1%	2%
Camper van/Motor home	0	0	2%
Bicycle	1%	1%	2%
Other misc. modes	3%	2%	3%

Table 4.6 Overseas visitors to Culzean by mode 2005

	Overseas Origin	
	USA	Germany
Mode	N=16	N=12
Private car	38%	50%
Hired car	44%	33%
Private coach	19%	0
Public bus	0	0
Camper van/Motor home	0	8%
Bicycle	0	8%
Other misc. modes	0	0

Table 4.7 Visitors to Falkland by mode 2005

	Origin		
	Scotland	England / Wales / N. Ireland	Overseas
Mode	N=185	N=69	N=67
Private car	91%	62%	36%
Hired car	1%	9%	31%
Private coach	5%	25%	27%
Public bus	1%	1%	3%
Camper van/Motor home	1%	3%	1%
Bicycle	1%	0	1%
Other misc. modes	2%	0	0

Table 4.8 Visitors to Gladstone's Land by mode 2005

	Origin		
	Scotland	England / Wales / N. Ireland	Overseas
Mode	N=61	N=119	N=67
Walked	46%	44%	52%
Public bus	26%	24%	27%
Private car	15%	18%	13%
Train	20%	5%	4%
Private coach	2%	14%	3%
Hired car	2%	3%	10%
Other misc. modes	2%	5%	3%

Table 4.9 Overseas visitors to Gladstone's Land by mode 2005

	Overseas Origin		
	USA	Australia	Germany
Mode	N=21	N=13	N=13
Walked	76%	46%	15%
Public bus	24%	38%	31%
Private car	0	23%	23%
Hired car	0	8%	38%
Train	5%	0	0
Private coach	5%	0	0
Other misc. modes	0	0	0

Table 4.10 Visitors to Hill House by mode 2005

	Origin		
	Scotland	England / Wales / N. Ireland	Overseas
Mode	N=149	N=161	N=62
Private car	86%	71%	42%
Hired car	4%	10%	44%
Train	5%	11%	8%
Walked	6%	7%	6%
Public bus	1%	1%	5%
Private coach	1%	2%	0
Camper van/Motor home	0	2%	0
Other misc. modes	1%	2%	0

Table 4.11 Overseas visitors to Hill House by mode 2005

	Overseas Origin	
	USA	Netherlands
Mode	N=13	N=10
Hired car	54%	0
Private car	31%	70%
Train	8%	10%
Walked	15%	10%
Public bus	0	20%

Table 4.12 Visitors to Inverewe Garden by mode 2005

	Origin		
	Scotland	England / Wales / N. Ireland	Overseas
Mode	N=108	N=108	N=39
Private car	93%	71%	36%
Hired car	2%	10%	38%
Private coach	2%	11%	23%
Walked	1%	4%	0
Camper van/Motor home	2%	3%	0
Public bus	1%	0	0
Other misc. modes	1%	2%	5%

Table 4.13 Visitors to Threave by mode 2005

	Origin		
	Scotland	England / Wales / N. Ireland	Overseas
Mode	N=236	N=266	N=17
Private car	95%	91%	59%
Hired car	<0.5%	3%	41%
Private coach	3%	2%	0
Camper van/Motor home	<0.5%	3%	0
Walked	1%	2%	0
Public bus	<0.5%	0	0
Other misc. modes	0	1%	0

4.14 The overall picture illustrated by Tables 4.1-4.13 is that, unsurprisingly, the further away visitors come from, the less likely they are to use the private car. As regards use of other modes of transport, this appears to be correlated with the available transport network at the attraction. For example, arrivals by train are highest at attractions such as Hill House in Helensburgh and Gladstone's Land in Edinburgh, both of which are close to railway stations. Since it is unlikely that visitors hire a car especially to travel to a specific visitor attraction, we can draw the more likely conclusion that the attractions visitors without a private car (i.e. principally those from overseas) choose to go to are dictated by the availability of public transport. Attractions such as Inverewe, Crathes, Culzean and Falkland, which are well beyond walking distance from a station, are not perceived as accessible by public transport, despite the fact that the National Trust for Scotland displays public transport information for all of the properties on its website. Such attractions appear to benefit from private coach tours. In this sense, the private coach is undoubtedly filling a perceived gap in transport provision. Moreover, country of origin of the visitor also appears to play a role. Although the numbers in the sample are small, it seems that visitors from North European countries are more likely to use public transport than those from the other countries represented, perhaps due to the fact that they are better unaccustomed to use public transport at home. Visitors from the USA are most likely to arrive at rural destinations by private coach or hire car.

Historic Scotland 2002 Visitors Survey

4.15 Historic Scotland undertake a major visitor survey every five years and data was supplied regarding mode of arrival at 19 of their properties from the most recent survey in 2002. The data is not disaggregated by origin but visitors to Scotland represent the majority (75%) of the sample. At Edinburgh Castle, however, 91% of visitors were from outside Scotland. Table 4.14 presents an overview of mode of arrival at all properties with Edinburgh Castle shown in a separate column. 78% of visitors to all properties arrived by car, 54% by private car and 24% by hire car. Since the 1991 and 1996 surveys, use of the private car has decreased by 17% and use of hire cars increased by 14%, attributable to the increase in visitors to Historic Scotland properties from further afield. The data confirms the findings of the National Trust for Scotland survey that limited parking facilities and good transport links in Edinburgh discourage visitors from arriving by car. It is also reasonable to assume that many of the visitors to Edinburgh Castle were staying in Edinburgh and could therefore walk to the property.

Table 4.14 Mode of arrival at Historic Scotland Properties 2002

	All Properties (total 19)	Edinburgh Castle
Private car	54%	19%
Hire car	24%	9%
Organised coach trip	10%	14%
Boat	6%	1%
Scheduled bus/coach	5%	20%
Walking all the way	4%	27%
Train	2%	9%
Walked part of way	1%	4%
Bicycle	1%	-
Campervan	1%	-
Taxi	-	4%

Glasgow Museums (Glasgow City Council, Culture and Leisure Services, 1999)

4.16 Data was obtained from Glasgow City Council on mode of transport to the key visitor attractions which it administers within the City of Glasgow (see Table 4.15). Again, it is not possible to differentiate between visitors from within and outside Scotland. Indeed the relatively high use of the private car in comparison to Edinburgh Castle probably reflects the higher percentage of Scottish visitors in the sample. The picture is nonetheless an interesting one since it appears that, the further the museum is located from the city centre, the more likely visitors are to arrive by car, despite the existence of good public transport links to attractions such as the People's Palace and the Museum of Transport. Indeed, the contrast between the Museum of Transport and the Kelvingrove Art Gallery is particularly acute, since they are located in such close proximity to one another. Again, greater numbers of visitors from overseas (with no access to a car) visiting Kelvingrove (a hallmark attraction) may explain this. It would be extremely useful if the data were collected and analysed in such a way that allowed this to be examined.

Table 4.15 Mode of arrival at Glasgow Museums 1999

Museum	Car	Local Bus	Train	Walk	Underground	City Tour Bus
	Percentage					
Kelvingrove	27	19	6	36	5	0
People's Palace	68	3	11	13	0	0
Museum of Transport	69	9	6	4	8	1
St Mungo Museum	35	22	6	33	2	0
The Burrell	88	7	1	3	0	0
GOMA	17	31	22	23	5	0
Scotland Street	62	6	3	7	15	0
Total	52	14	8	17	5	0

Falkirk Wheel data (British Waterways, 2005)

4.17 British Waterways provided data on mode of arrival to the Falkirk Wheel, one of Scotland's increasingly popular visitor attractions. The Falkirk Wheel lies on a canal and on a dedicated cycle route (the canal towpath). There are two train stations nearby in Falkirk and a shuttle bus service is provided from the station. In the years 2003, 2004 and 2005, a visitor survey was undertaken. In 2003, a sample of 200 visitors was obtained, this was increased to 300 in 2004 and 2005. The percentage of visitors resident in Scotland across the three years was 64%, 47% and 68% respectively. It is not clear how representative these percentages are in terms of total visitation. Although data was provided for all three years, there is a lack of continuity in the categories of transport used, thus only data for 2005 is presented here (Table 4.16). There was a slight decrease in the percentage of Scottish residents arriving by car from 88% in 2003 to 82% in 2005. The numbers arriving by public bus and tour coach have increased slightly.

Table 4.16 Main method of transport you used to the Falkirk Wheel 2005

Mode of Transport	Percentage
Car/van/motorcycle	82.0
Private boat	0.3
Train/Underground	2.9
Public bus	2.3
Tour coach/minibus	4.3
Bicycle	1.6
Taxi/minicab	0.3
Walked	5.8
Other	0.3
Total	100.0

4.18 Cross analysis of the data shows findings consistent with the others discussed in this section, namely that Scottish residents were underrepresented as users of public transport and tour coaches. However, they were overrepresented in the categories of walking and cycling.

Transport to Scottish Natural Heritage Sites (Scottish Natural Heritage, 2004)

4.19 Scottish Natural Heritage (SNH) are one of the key organisations involved in the management of tourism in Scotland, having responsibility for Scotland's protected areas, which constitute about 20% of the land area. This includes a number of National Nature Reserves and the two National Parks. They periodically undertake visitor and user surveys within these protected areas. Table 4.17 is a summary of mode of transport use to access SNH properties taken from five visitor surveys over the period 1997 to 2003. Transport aspects of the first three studies are discussed in further detail below.

Table 4.17 Mode of transport to Scottish Natural Heritage sites

Survey	Ratio Scottish to Other	Own Vehicle	Public (Bus/Train)	Private (Coach)	Bicycle/ Walk
	Percentage				
NNR Visitor Survey 2002-2003	52:48	86	4	1	3
LLT NP Visitor Survey 2003-2004	n/a	74	9	6	3
Cairngorms NP Visitor Survey 2003- 2004 (interim report)	n/a	76	5	8	<1
Cairngorm Mountain Recreation Survey 1997-1998	56:44	94	1	3	1
Glenmore & Rothiemurchus Visitor Survey 1998-1999	58:42	90	3	3	2

4.20 The NNR Baseline Visitor Survey was undertaken by NFO on behalf of SNH at 23 National Nature Reserves in Scotland on a sample of 4220 visitors to the park. 52% of these visitors were from Scotland, 36% from elsewhere in the UK and 10% from overseas. When asked to indicate what their *main* type of transport had been on their journey to the NNR they were visiting, the majority of respondents indicated that they had travelled by car or van (86%). Other methods were much less likely to be used, with 6% travelling by boat or ferry, 4% using public transport and 2% walking all the way. Table 4.18 illustrates that type of transport used was similar regardless of the types of trip taken. It was also found that younger visitors were slightly less likely to travel by car (79%) while those classified as *Empty Nesters* were more likely to do so (85%).

4.21 Visitors to island NNRs were clearly more likely to state that their main form of transport was a boat or ferry (30%) and visitors to NNRs located in the Northern Isles (8%), Grampian (8%) and the West Highlands (6%) were slightly more likely to use public transport than in other areas. Whilst it is not possible not separately examine mode of travel by visitors from outside Scotland within this data set, the high percentage of such visitors in

the sample, combined with the high rate of car usage, suggests a higher level of car usage than for the National Trust properties, perhaps due to the remote nature of SNH properties.

Table 4.18 Transport used by type of visit (NNR Baseline Visitor Survey)

Mode of Transport	Type of visit			
	Short day trip	Day trip	Holiday	Total
	%	%	%	%
Car or van	88	85	83	84
Boat/ ferry	2	6	8	6
Public transport	4	5	2	4
Walked all the way	3	*	3	2
Bicycle	2	1	1	1
Private coach or mini-bus	1	1	1	1
Motorcycle	1	<0.5	1	1
Motorhome/ camper van	-	-	1	1
<i>Base: All respondents</i>	<i>948</i>	<i>679</i>	<i>2406</i>	<i>4220</i>

Source: Scottish Natural Heritage (2004)

Cairngorms Visitor Survey (Lowland Market Research, 2004)

4.22 A very comprehensive report was carried by Lowland Market Research on behalf of Cairngorms National Park in 2004. The research, which looked at various aspects of visitor profile, behaviour and satisfaction, was supported and funded by a number of organisations including the National Park Authority, VisitScotland and Scottish Enterprise. The study, the first wide-scale 12 month investigation since the establishment of the National Park in 2003, was intended to act as a baseline from which to monitor future developments through an ongoing survey programme to be repeated around every three years.

4.23 The three main objectives of the study were:

- To supply information about visitors and their visit in order to guide future tourism policy and activity;
- To gather data, which can be updated in future studies to enable changes to be tracked over time;
- To furnish information which can be used to assist in the production of estimates of the volume and value of visitors to the overall National Park area, as well as key sub areas.

4.24 The survey methodology combined face to face interviews with residents and visitors and self-completion questionnaires. Interviewing took place between May 2003 and April 2004 at different locations across the park. Of the 2500 people who took part in the face to face survey, 416 lived within the park boundaries and 2084 were visitors to the area. A total of 1076 self-completion questionnaires, distributed at key visitor sites around the park, were also returned to researchers. The report contains a substantial section on the use of transport to and within the Cairngorms National Park. Although the origin of visitors was measured by the survey, responses to important questions about visitors' experiences and perceptions of

services within the park have unfortunately not been compared on the basis of origin. Nor has it been possible to gain access to the data set used for this research. Nonetheless, important differences between residents and visitors have been identified with regard to transport.

4.25 Unfortunately this information on mode of transport use is not broken down by origin of visitor. However, some indication of where opinions from outside Scotland principally lie can be gleaned from examining the information on length of stay. Whilst 100% of daytrippers were from Scotland, of the 1569 visitors questioned who were staying one night or more, 24% were from overseas. Table 4.19 illustrates that overseas visitors tend to spend longer in Cairngorms National Park than visitors from Scotland or the wider UK. Since use of transport is broken down by length of stay, we can make some observations on the types of transport which visitors from outside Scotland have used both to access the park, and to travel around within it.

Table 4.19 Visitor origin by length of stay Cairngorms National Park

	Total	Visitor Type			
		Resident	Day Tripper	Short Break 1-4 nights	Longer Break 5+ nights
Base: All Respondents	2500	417	514	479	1090
Park Resident	17%	100%	-	-	-
Other Scottish	41%	-	100%	44%	27%
Other United Kingdom	28%	-	-	50%	42%
Overseas	15%	-	-	6%	31%

Source: Lowland Market Research (2004)

4.26 Participants in the survey were asked which mode(s) of transport they had used to access the park (Table 4.20) and to travel within the park (Table 4.21). The dominant means of transport used to access the Cairngorms was private car/ hired car cited by 86% of those on a day trip, 82% on a short break and 74% of visitors on a longer break. Private bus/ coach tours, organised by companies such as Shearings, transported 10% of short break visitors and 14% of those on a longer holiday, while public buses were used by 4% and 3% of respondents on short breaks and longer holidays respectively. The rail network was only utilised by 1% of people on a short break and 2% on a longer holiday.

4.27 The private car also emerges as the preferred mode of transport for travel within the park for day visitors and holidaymakers alike. Among those taking a break within the park, buses and coaches are used by 15% on a short break and 17% on a longer break. Walking and cycling are also highlighted in these findings as important forms of transport used by visitors to travel around the park, while rail travel is absent, suggesting the lack of a relevant service.

Table 4.20 Form of transport used to access Cairngorms National Park

	Total	Day Tripper	Short Break 1-4 nights	Longer break 5+ nights
	2083	514	479	1090
Private Car/Hired Car	78%	86%	82%	74%
Private car	70%	82%	76%	62%
Hired car	8%	4%	6%	12%
Bus/Coach	14%	9%	14%	17%
Private bus/coach tour	11%	7%	10%	14%
Public bus/coach	3%	2%	4%	3%
Motor home	2%	1%	1%	3%
Train	2%	1%	1%	2%
Motorbike	2%	2%	1%	2%

Source: Lowland Market Research (2004)

Table 4.21 Form(s) of transport used in the Cairngorms area?

	Total	Resident	Day Tripper	Short Break 1-4 nights	Longer break 5+ nights
	2500	417	514	479	1090
Private car/Hire car	76%	82%	71%	79%	74%
Private car	68%	76%	68%	75%	61%
Hired car	8%	6%	3%	4%	13%
Bus/Coach	14%	10%	9%	15%	17%
Private bus/coach tour	10%	5%	7%	11%	13%
Public bus/coach	4%	5%	2%	4%	4%
Walking	12%	9%	28%	8%	7%
Motor home	2%	2%	0%	0%	4%
Bicycle/mountain bike	2%	3%	1%	1%	1%
Motorbike	2%	3%	2%	2%	2%

Source: Lowland Market Research (2004)

4.28 The Cairngorms National Park Visitor Survey used two different means of data collection and Table 4.22 compares mode of arrival across two of these. There are clear differences in the results of the two samples but no attempt is made by the researcher to explain or reconcile these.

Table 4.22 Form of transport used to get to the Cairngorms area

	Self Completion	Face to Face	Total
Base	1076	2083	3159
Private car	93%	78%	83%
Private bus/coach tour	2%	11%	8%
Public bus/coach	2%	3%	3%
Walking	2%	0%	1%
Bicycle/mountain bike	0%	0%	0%

Loch Lomond and Trossachs Visitor Survey 2005 (Loch Lomond and the Trossachs National Park Authority, 2005)

4.29 A very similar survey was undertaken the following year by the same contractor in Loch Lomond and the Trossachs National Park. The same questions were asked and the results are presented below in Tables 4.23 and 4.24. Again, visitors from outside Scotland were most likely to have undertaken a longer stay in the park, with 76% of those on a longer break residing outside Scotland.

Table 4.23 Form(s) of transport used to get to the Loch Lomond & the Trossachs area

	Total	Day Tripper	Short Break 1-4 nights	Longer Break 5+ nights
Base: Visitors to the area	2500	925	715	860
Private car/Hired Car	85%	90%	82%	83%
Private car	77%	89%	76%	67%
Hired car	8%	1%	6%	16%
Bus/Coach	11%	6%	17%	12%
Public bus/coach	2%	2%	3%	2%
Private bus/coach tour	9%	4%	14%	10%
Motorbike	3%	5%	2%	2%
Public bus/coach	2%	2%	3%	2%
Walking	1%	0%	1%	3%
Bicycle/mountain bike	1%	1%	1%	0%
Train	3%	1%	4%	4%
Ferry	1%	1%	0%	1%
Plane	3%	0%	3%	5%
Motor home	1%	0%	1%	1%
Other	1%	1%	1%	1%

Lowland Market Research (2005)

4.30 Unsurprisingly, the dominant means of accessing the Loch Lomond and the Trossachs area was private /hired car, the figures being fairly static for both day trippers and people spending a longer time away from home. Day trippers were most likely to have used a private car (89%). Use of a hired car is highest among people spending a longer break away from home (16%). The use of a private bus or coach tour is highest among those people on a

short break (14%), again highlighting the importance of the five day breaks offered by many of the coach tour holiday companies such as Shearings. Use of private car/hired car for visitors from overseas is stated by the report to be 83%.

Table 4.24 Form(s) of transport used in the Loch Lomond & the Trossachs area

	Total	Resident	Day Tripper	Short Break 1-4 nights	Longer Break 5+ nights
Base: All Respondents	3000	500	925	715	860
Private car/Hired car	81%	85%	80%	79%	82%
Private car	74%	83%	78%	73%	66%
Hired car	7%	2%	2%	6%	16%
Bus/Coach	11%	6%	6%	17%	13%
Public bus/coach	3%	3%	2%	3%	3%
Private bus/coach tour	8%	3%	4%	14%	10%
Walking	15%	8%	17%	14%	16%
Motorbike	3%	2%	5%	2%	2%
Train	1%	1%	0%	2%	1%
Plane	0%	0%	0%	0%	1%
Ferry	1%	0%	1%	0%	1%
Yacht/boat	1%	0%	3%	0%	1%
Motor home	0%	0%	0%	1%	1%
Bicycle/mountain bike	2%	0%	2%	1%	2%
Hitch-hiking	0%	0%	0%	0%	1%
Other	1%	0%	2%	1%	1%

Lowland Market Research (2005)

4.31 Again, differences were found in the results of the face to face and self completion questionnaires, although these were less acute than in the Cairngorms Visitor Survey. Total responses are summarised in Table 4.25.

Table 4.25 Form(s) of transport used to get to the Loch Lomond & the Trossachs area

	Self Completion	Face to Face	Total
	1068	2500	3568
Private car	92%	85%	87%
Private bus/coach tour	3%	9%	7%
Public bus/coach	1%	2%	2%
Walking	3%	1%	2%
Bicycle/mountain bike	1%	1%	0%

Lowland Market Research (2005)

4.32 The State of the Park report (Loch Lomond and the Trossachs National Park Authority, 2005) summarises the situation as regards access by modes of transport not dedicated to tourist use. Since direct rail access to the park is limited to Balloch and stations on the West Highland line along the West Coast of Loch Lomond, public buses represent the

majority of public transport provision with services operating on most major roads. However, the report criticises the infrequent services, poor information and waiting facilities and lack of integrated ticketing. The park is thought to be easily accessible by road, but at peak visitor times there have been frequent reports of traffic congestion in popular areas. The volume of traffic in the park is also known to create parking problems, especially in popular visitor destinations such as Luss, Callender and Aberfoyle. Road conditions in certain areas of the park are also reported to be a source of complaint for both residents and visitors. The park can be accessed by ferries from Gourock operated by Caledonian MacBrayne and Western Ferries, however water transport within the park is limited. Walking and cycling, while mostly undertaken purely as leisure activities, are also considered within the report. The park does boast long distance cycle tracks and the requirement is indicated for better integration of cycling with public transport, extending the provision for cycle carriage on public buses. The possibility of park and ride facilities at Balloch is also discussed.

Tourist Use of Rail (First Scotrail data, 2005)

4.33 To conclude this section on visitor use of modes of transport which are not dedicated to tourist use, it is useful to examine data provided by First Scotrail which has been collected on users of the Freedom of Scotland Travelpass. As mentioned earlier in this section, Freedom of Scotland Travelpasses are aimed at tourist travellers and allow either 4 out of 15 consecutive days travel for £96, or 8 out of 15 consecutive days travel for £130. Travel is allowed on certain train, bus and ferry services. ScotRail has supplied data for the purchases of the Freedom of Scotland Travelpass and this is analysed below.

4.34 66% of Travel passes were bought in a travel centre or station, the second most popular method of buying a Travelpass was on the internet, however only 12% of passes were bought on the internet. Figure 4.4 shows that travel to Scotland by Travelpass users from outwith the UK is mainly by aeroplane, with over 60% of users arriving this way. 20% also travelled to Scotland from outside the UK by day train. Just under 10% of Travelpass users from outside the UK travelled to Scotland by bus/coach. Nearly 70% of Travelpass users from within the UK travelled to Scotland by train, with just over 10% of users travelling by airplane and 10% by car to Scotland. Less than 5% of people from within the UK used the Caledonian Sleeper or the bus/coach to travel to Scotland.

4.35 51% of people purchasing the Travelpass had used a tourist ticket previously, with 61% having used the Freedom of Scotland Travelpass before, 15% having used the Highland Rover and 2% having used the Central Scotland Rover. This perhaps indicates a niche market with a high degree of repeated usage. 40% of those using the tourist tickets from outside the UK learnt about the passes from the internet while 22% were recommended the passes by a friend or relative. By contrast, of those purchasing tourist travel tickets from within the UK, only 14% found out about the tourist tickets from the internet, 7% were recommended the tickets from a friend or family and 7% saw the tickets advertised in a Scotrail leaflet.

Figure 4.4 Travel to Scotland by Travelpass users

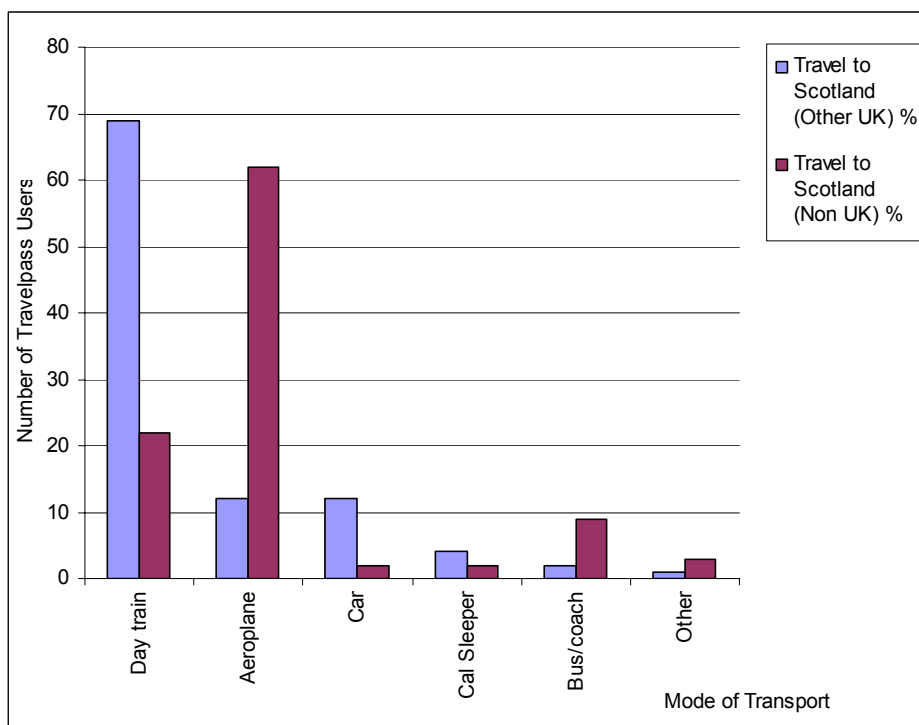
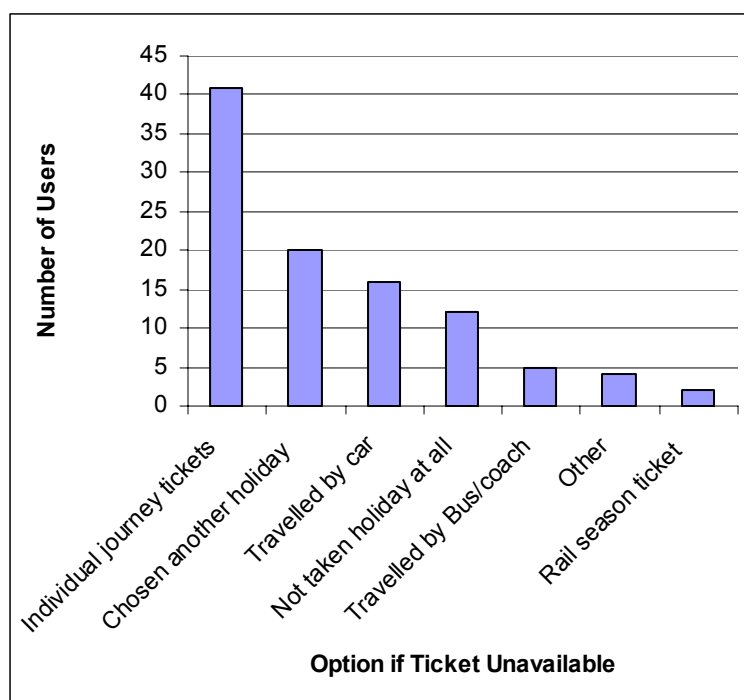


Figure 4.5 Transport option taken if tourist ticket unavailable



4.36 It is interesting to note from Figure 4.5, that 20% of users would have chosen a different holiday if their tourist travel ticket was not available from First Scotrail. Over 40% of users stated, however, that they would have bought tickets for individual journeys. Again this indicates a consistent market segment of tourists who prefer to travel by rail. From Table 4.26 it can be observed that the West Highland Line is used by 38% of those with

Travelpasses, 33% also use the Edinburgh/Glasgow to Inverness line and 28% use ferry services included in the ticket. It is noticeable that only 24% of passengers use the bus to travel. Very few passengers are seen to be travelling by rail south of Edinburgh.

Table 4.26 Routes used by Travelpass users

Operator	Route	%
First Scotrail	West Highland Line	34
	Edinburgh/Glasgow - Inverness	33
	Inverness - Kyle	26
	Edinburgh - Glasgow	20
	Aberdeen - Inverness	18
	Inverness - Wick/Thurso	17
	Edinburgh - Aberdeen	16
	Glasgow - Aberdeen	10
	Glasgow - Carlisle/Newcastle	10
	Edinburgh/Glasgow - Falkirk /Dunblane/Perth	5
	Fife Circle	5
	Glasgow - Stranraer	4
	Edinburgh - North Berwick	3
	Edinburgh - Bathgate	1
	Glasgow - Shotts - Edinburgh	1
SPT	Ardrossan/Largs/Ayr	8
	Wemyss Bay/Gourock	3
	North Electrics	4
	Argyle Line	2
	Glasgow - Whifflet/Cumbernauld/Motherwell	2
	Paisley Canal	1
Citylink	Glasgow - East Kilbride/Barrhead/Kilmarnock	1
	Oban/Fort William - Inverness	8
	Kyle - Uig	8
	Inverness - Ullapool	5
Stagecoach	Wick - Thurso/John O Groats	2
	Dundee/Leuchars - St Andrews	1
Other	Ferry Services	28
	GNER	8
	Virgin	5
	Highland Country	2
	Subway	2
	Bowmans	2
	Guide Friday	1

4.37 Figures 4.6 and 4.7 demonstrate that Travelpasses are principally used by visitors from outside Scotland, but mainly purchased in Scotland.

Figure 4.6 Country of origin of Travelpass users

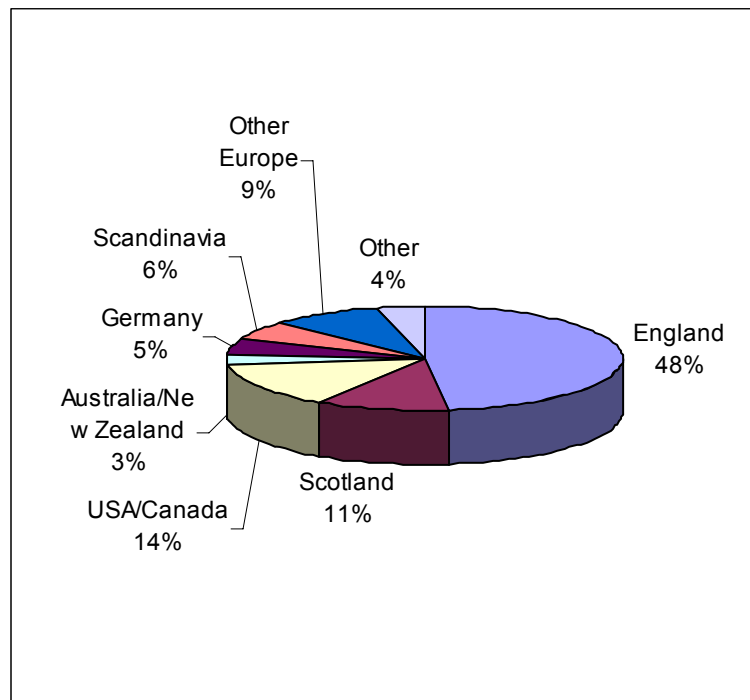
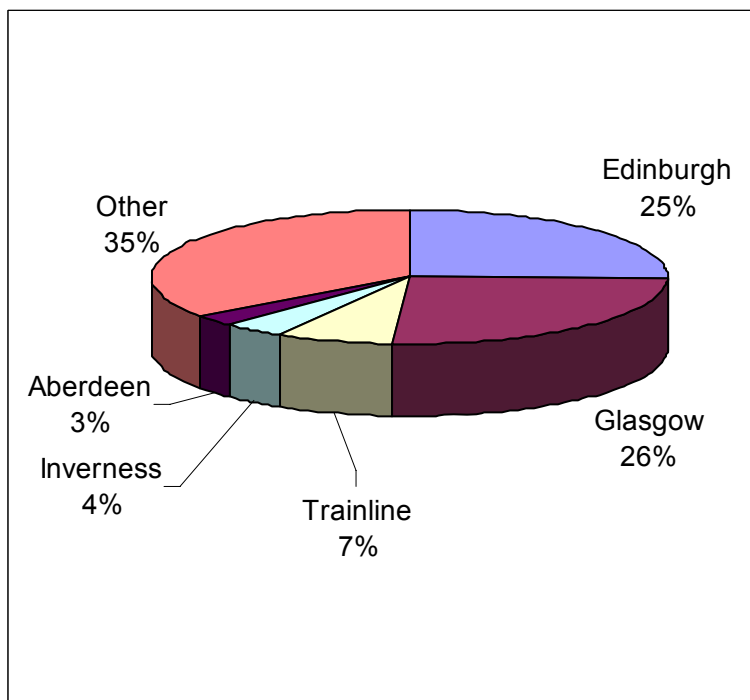
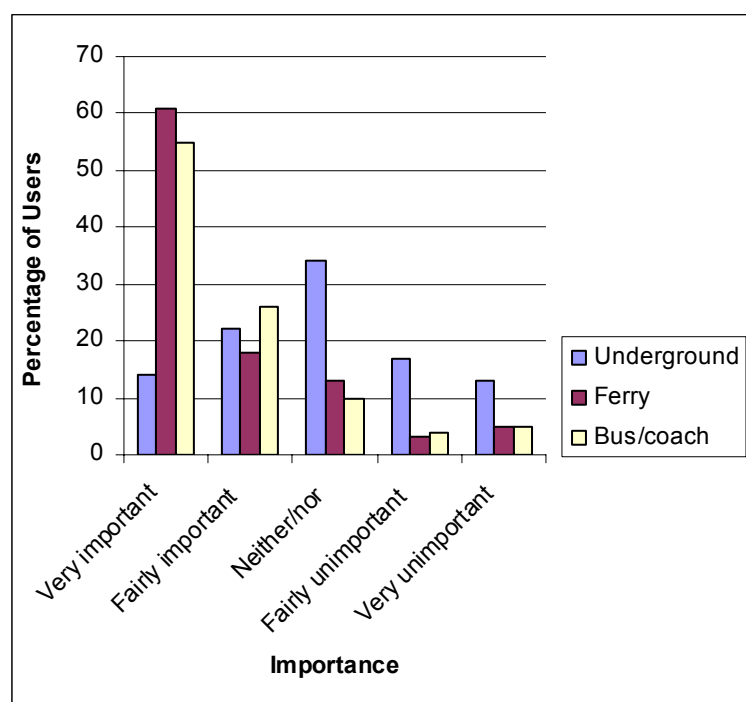


Figure 4.7 Issuing office for Rover and Travelpass tickets



4.38 The importance of other modes of transport included in the Freedom of Scotland Travelpass is outlined in Figure 4.8. It can be seen that ferry and bus use are important factors in motivating Travelpass purchase, with use of the underground being less important.

Figure 4.8 Importance of other modes of transport



4.39 The role of the tour operator in influencing mode of transport choice is crucial for organised travellers. Group tours using existing rail services are uncommon, as these services are considered a much less suitable alternative to coach travel – barriers to such use of rail travel are discussed toward the end of Chapter 5. However, such products do exist. Figure 4.9 below provides an example of a forthcoming rail tour of Scotland designed around the Freedom of Scotland pass but also using private railways and coaches. The cost of this tour is around US\$3,000 and it can therefore be considered a specialist, luxury product.

Case Study 4.2 Freedom of Scotland Rail Pass

Scotland By Rail August 24-September 3, 2006

Land tour from \$2899.00 including a Freedom of Scotland Rail Pass

Our tour stays at only three hotels in eleven days, beginning with four nights at the comfortable Quality Station Hotel in Perth, five nights at the Ramada Jarvis Hotel in Inverness, and a final night back at the Quality Station Hotel in Perth. This allows a relaxed pace throughout. Using a mixture of Scot Rail trains, preserved steam railways and private coaches, we see the grand scenery of the Highlands in depth. Each participant will have a [Freedom of Scotland Rail Pass](#), allowing deviations from the scheduled tour to pursue individual interests. Train journeys include scenic rides on Scot Rail over the rugged Highland mountains, particularly the stunning coastal scenery from the [Kyle of Lochalsh line](#)

and the arched viaducts en route to Mallaig on the West Highlands line (planned to be behind a steam locomotive). We ride to the true “end of the line” at Thurso and Wick, northern-most points on the mainland of Great Britain. There also are journeys on restored historic railways at steam centers on the [Caledonian](#), [Strathspey](#) and [Bo’ness and Kinneil Railways](#) .

Itinerary:

Perth – Dundee – Stirling – Pitlochry – Skye – Wick and Thurso – John O’Groats – Loch Ness – Fortwilliam – Mallaig – Inverness – Perth

Further details of this tour can be found at <http://www.railtvl.com/Scotland%202006.htm>

4.40 An attempt was made to access data on use of transport for large scale events in Scotland. Some data was obtained from EventScotland but the data collected is in the form of an economic impact study and therefore does not cast a great deal of light on travel behaviour. Two reports by Comperio Research (2005a; 2005b) provide information for the Open Golf Championship in St Andrews in 2005. It was calculated that spectators spent £2,050,000 on travel in Scotland, 60% of which was on petrol. This was higher than expenditure on all other categories, with the exception of food and drink. For the Senior British Open Championship 2005 in Aberdeen, expenditure on travel was considerably less, calculated at £27,000 for the North East of Scotland and £12,000 for Scotland. Again, the majority of expenditure is estimated to be on petrol, with the remainder attributable to car hire and public transport.

4.41 EventScotland were able to verbally provide some data on mode of transport use for the Open Championship (Table 4.28). The percentage of visitors using public transport (train and bus) is rather higher than has been observed in many of the other studies discussed above, possibly due to special provision for the event. 54% of the 1948 respondents were from Scotland with 35% from the rest of the UK and the remaining 11% from overseas. 88% of visitors to the event rated accessibility and availability of transport to and from the course as very good. A small number of visitors said that their experience of the Open Golf Championship could have been improved through better travel options to and from St Andrews (6.7%), more/ better parking (4.0%) and more/ better signage (1.9%).

Table 4.28 Main form of travel to St Andrews course

Mode of Transport used	%
Own car	55.5%
On foot	13.9%
Train	11.1%
Bus	7.7%
Hire car	7%
Helicopter	0.9%
Boat	0.2%
Other	3.7%

4.42 For the case of the Burns an' a' That Festival which took place in May 2005 in Ayrshire, an evaluation and economic impact assessment compiled by the Moffat Centre for Travel and Tourism Business Development (2005) provides data on mode of transport used to travel to Ayrshire for various events. Table 4.29 details the responses of a sample of 255 respondents by place of residence, some respondents using more than one form of transport. It can be observed that the number of respondents from outside Scotland is very small. The dominance of the private car is however less acute for these visitors, than for those from Ayrshire and elsewhere in Scotland. Private coach did not feature in the range of transport modes used, which probably indicates that the festival, which takes place outside peak season, does not feature on organised tour itineraries.

Table 4.29 Mode of transport to Burns an' a' That Festival by origin

Mode of Travel to Ayr/Ayrshire	Ayr	Other Ayrshire	Other Scotland	England	Overseas	Total
Sample	54	97	84	14	6	255
Walked	11	22	-	-	-	33
Own car	34	68	60	8	2	172
Train	2	3	20	2	1	28
Bus	6	2	3	1	1	13
Scheduled coach	1	-	-	-	-	1
Private coach	-	-	-	-	-	0
Hire car	-	-	-	2	2	4
Air	-	-	-	1	-	1
Other	-	3	2	1	-	6
Total	54	98	85	15	6	258

Source: Moffat Centre for Travel and Tourism Business Development (2005)

Visitor use of tourist dedicated modes of transport

4.43 The most common form of tourist dedicated transport in Scotland is the private coach. Data presented earlier in this chapter has illustrated that it plays a crucial role in transporting visitors, particularly those from outside the UK, around the more remote areas of Scotland which are less readily accessible by public transport, but also to urban locations (14% of visitors from outside Scotland travelled to the Gladstone's Land National Trust property in Edinburgh by private coach). Private coach travel is often associated with organised group travel and, where this is the type of trip chosen by the visitor, travel behaviour has normally been decided at the point of booking the holiday. Coach travel is often argued to be popular among certain market segments, particularly the young and the elderly, due to low cost and high convenience. This is reflected in the range of coach travel products on the market, from those at the top end of the market which may use expensive accommodation and are marketed as luxury coach tours, to the backpackers buses which are essentially a cheap form of coach tour with built in flexibility. Additionally, short coach trips are offered by companies such as Jacobite and Heart of Scotland Tours. The decision to use this form of travel may be taken at shorter notice but advance booking would probably be required during peak season.

4.44 Tourist dedicated travel by rail is less common, but a number of products do exist. The Jacobite steam train runs a daily summer service from Fort William to Mallaig and is

extremely popular with tourists. However, tickets for this train are only available from the private company which operates the tour, and not from the normal rail ticket outlets. This may pose a barrier to use for visitors who only discover the existence of the service during their stay in Scotland. Luxury rail products exist, such as the Royal Scotsman luxury train which offers a five day tour for a maximum of 36 passengers at a costs of US\$5500 with accommodation and food on board the train.

4.45 Little data is available on the use of tourist dedicated modes of transport by visitors. However, in 2003 research was commissioned by VisitScotland in order to fill gaps in their knowledge regarding the coach tour market (Lynn Jones Research, 2003). The survey focused on industry stakeholders rather than consumers, to gain a better initial understanding of the market and is thus interesting, as it provides information on the mediating role of tour operators in travel behaviour. The study involved a desk based review of secondary data and eleven interviews with individuals representing industry interests.

4.46 The report begins by discussing the way in which coach tours are organised and sold before naming the main companies operating in the Scottish market. It is also noted that, in some instances, tour operators may not own the coaches they use, choosing instead to hire coaches and have them branded. Coach tours are shown to account for 3% of all tourist trips to Scotland with the domestic market accounting for 80% of business and the majority of overseas coach tour passengers coming from Germany, however, the source of these figures is unclear. The report provides a brief profile of coach passengers, stating that traditionally touring is seen to appeal to single travellers, those in older demographic groups and those on a fixed budget. The ability to relax on the holiday without the anxiety that can be associated with transport and travel in an unfamiliar place is suggested as a possible explanation for this trend.

4.47 The remainder of the report focuses on the factors that influence tour operators' choice of destination, namely price (including the customers budget), the type of attractions that are in the vicinity and the distance to the next destination. It is argued that, in order for a tour to sell to overseas coach customers, the destinations (or occasionally events) included in the itinerary must be of world renown. Relations with hoteliers and quality assurance are also discussed in detail. While transport is an intrinsic part of any discussion pertaining to the coach tour market, it was not found to be the primary focus of the report. Indeed the price and quality of available accommodation was highlighted as being a crucial factor in the decisions of tour operators as, with a private coach available, passengers can easily be transported to attractions and events that are of interest.

4.48 Discussing the future of the coach tour market, the report suggests that the sector will face increasing competition from low cost airlines and may have to restructure to accommodate the growth in popularity of short breaks and more independent travel, which may influence a switch towards tourists use of public transport. The lack of empirical data rather limits the usefulness of the report as visitor profile is based on anecdotal evidence as opposed to empirical research. Nor does the methodology employed allow satisfaction with the product to be viewed from the passenger perspective, highlighting the need for further research to be undertaken in this area.

Chapter summary

4.49 This chapter has provided a review of the scope and limitations of transport provision for visitors to Scotland from a supply and demand side perspective. It has been identified that private transport is the predominant mode of transport used by visitors to Scotland. This applies not only to the private and hire car, but also to private coach tours. However, the recurring pattern that emerges from the available data is that the further away visitors come to Scotland from, the less likely they are to use the car. Visitors from North America (Scotland's main overseas market) are the possible exception to this, but there is insufficient data to substantiate this claim.

4.50 The data reviewed indicates the presence of small, but nonetheless significant markets for public transport amongst visitors to Scotland. For example, in urban areas there is evidence of a substantial degree of use of public transport by visitors. Moreover, it is likely that the rise in the number of visitors travelling directly by air to Scotland from overseas, but also from the more distant regions of the UK as a result of the low cost carriers and the International Route Development Fund will result in a greater percentage of visitors being reliant on public transport during their stay. Moreover, there appears to be a small but significant market for rail travel which consists of a relatively high percentage of return visitors who prefer to travel by rail and would not make the journey by another mode. It is important that such markets are adequately catered for and the Freedom of Scotland pass appears to be satisfying a niche market in this respect. Furthermore, indications from the National Park data suggest that it is the visitors who stay longer that are most likely to use public transport. Since this type of traveller spends longer at the destination, they are likely to be higher spenders than day visitors who arrive and depart by car on the same day and spend little. The former type of tourist is thus to be favoured in terms of their environmentally and economic impact on the destination.

4.51 Some gaps in the existing transport provision are, however, apparent. Although barriers to public transport use will be explored further in Chapter 5, it is useful to comment here on some of these gaps. As regards road transport, congestion in popular tourist areas, poor roads in some rural areas, a lack of parking facilities and poor signage have been identified as gaps in provision. In the latter case, policy on the signing of tourist attractions and facilities from main trunk roads perhaps requires reviewing with regard to permission but also financing. From the perspective of public transport, it is evident that many of the visitor attractions which are located in more rural areas, in particular the areas of natural beauty administered by Scottish Natural Heritage, but also some of the National Trust for Scotland sites, are accessed almost exclusively by private transport. An interesting phenomenon is suggested at some of these sites where the private coach appears to have replaced public transport as a means of access. What is not, however, clear is whether the desire to visit these attractions drives visitors to hire a car, or whether the sites are only visited by those who have made the decision to hire a car for other reasons. This is certainly worthy of further exploration.

4.52 Good practice should also be stressed. Particularly within the residential belt incorporating the cities of Glasgow and Edinburgh, there is evidence of longstanding and more recent initiatives which provide examples of transport and tourism operators working together to increase the number of visitors using public transport and visiting local attractions. Integrated ticketing is perhaps the most common example, but this is largely limited to one day tickets allowing visitors to a cluster of attractions in relatively close

proximity to one another. The appeal of extending such schemes is worthy of further investigation. In addition, such schemes could be extended to cover a longer period and a more diffuse range of attractions.

CHAPTER FIVE VISITOR EXPERIENCE AND PERCEPTIONS OF TRANSPORT SUPPLY IN SCOTLAND

Background

5.1 Studies of transport service quality and performance from the passenger perspective typically focus on the attitudes of local users regarding the adequacy of existing public transport provision and there has so far been limited attention to the attitudes and experiences of tourists with regard to transport provision. However, it seems legitimate to propose that tourism planners should exercise an influence on transport planning and, vice versa, that transport planners should pay greater attention to tourists' transport requirements, particularly in areas where a high ratio of visitors to residents is the norm at certain times of year, or in the case of large scale events. Customer centred transport systems may be an important factor in influencing the use of local transport services by tourists and whilst local transport needs should indeed take precedence over tourists' needs, consideration of the transportation requirements of visitors to urban and rural areas requires further attention.

5.2 The ability of tourist dedicated transport to add to the attraction and enjoyment of a destination is evident, since this type of transport is often intended as an attraction and consumed by the tourist for its own sake. Detailed investigation of how transport which is not dedicated to tourist use influences the tourist experience remains limited. Visitor experiences and perceptions of destinations are routinely measured using structured methods such as attribute-based models, which measure the importance and/or performance of a range of tangible and intangible elements of the tourism product at a destination, typically attractions, facilities, infrastructure, hospitality and cost. Transport related attributes that are typically measured in tourism studies include those relating to the cost of transportation and the adequacy of transport nodes such as airports and bus stations. However, it is beyond the scope of most destination satisfaction studies (academic or practitioner) to investigate the detail of public transport performance from the visitor perspective.

5.3 For the purpose of this study, visitor satisfaction surveys from destinations and attractions across Scotland have been examined for the inclusion of variables measuring experiences of and perceptions of local transport. Moreover, public transport operators in Scotland have been asked to identify to what extent it is possible to distinguish between local users and visitors within the passenger satisfaction surveys that they may have conducted. Since no studies have been uncovered which have the sole purpose of measuring visitor satisfaction levels with public transport, the aforementioned are the two principal sources of data which have informed this section of the report. Qualitative data has also been included, which reports the adequacy of transport links to attractions, since this also informs the above objective. This chapter of the report may appear rather piecemeal, since it has been necessary to extract and interpret relatively minor sections of data from the reports in question. The studies are unrelated and have used different methods of investigation, within a variety of geographical locations and focussing on different transport modes. Moreover, the wording of questions means that it is not always easy to be precise about whether the respondents are commenting on the quality of the transport experience *per se* or the impact which this has had on their enjoyment of the destination. Due to the resulting difficulties in combining and comparing the available data, a more seamless synthesis of the data has not proved possible.

5.4 This section of the report commences with a review of data sources and reports which enhance our understanding of visitor perceptions of and satisfaction with public transport in Scotland, measured respectively by visitor attractions and transport providers. There follows a review of existing data on the link between transport satisfaction and destination satisfaction. Examples of good practice in enhancing the visitor transport experience are provided from Scotland and beyond. The role of information in the accessibility of transport for visitors to Scotland will be explored and key barriers to travel within Scotland for the tourist are examined, within the context of the various modes of available transport. Finally conclusions are drawn on the internal accessibility of Scotland as a visitor destination.

Data from tourist attractions or destinations reporting visitor perceptions of transport

Tourism Attitudes Survey (VisitScotland, 2005)

5.5 Since 1999, VisitScotland has commissioned four Tourism Attitudes Surveys (TAS). The main objectives of these surveys were to:

- Understand the decision-making and planning process of the holiday maker
- Analyse the visitor experience throughout the duration of their stay from arrival to departure
- Identify, in some detail, the likes and dislikes of every aspect of the visitor's holiday experience
- Probe the visitor's overall experience and his/her future intentions to return to Scotland

5.6 The TAS 2005 asked a sample of 651 visitors to Scotland (domestic and international) about their expectations and experiences of Scotland. 151 visitors from England and Wales were included in the sample, as well as 100 visitors each from Germany, France, Italy and Sweden. Previous Tourism Attitudes Surveys have monitored the experience of other key markets (USA, Canada, Spain, Holland).

5.7 One of the questions included in the TAS asks visitors to rate how easy it was to travel around during their holiday in Scotland. The question does not appear to distinguish between public and private transport. Therefore, we can assume that responses indicate not only visitors' perceptions towards the adequacy of public transport in conveying them around the destination, but also to a number of other factors relating to private transport and infrastructure. Closer inspection of Table 5.1, which shows the modes of transport used at the destination by the different nationalities surveyed can provide further intelligence on this.

Table 5.1 Percentage of visitors from outside Scotland using different forms of destination transport

	England and Wales	Germany	France	Italy	Sweden
	% of visitors using mode of transport				
Own car	58	26	40	3	9
Hire car	8	29	31	54	26
Total car	66	55	71	57	35
Public bus	24	49	26	43	28
Train	17	33	13	26	25
Coach	2	-	-	-	-
Total public transport	43	82	39	69	53
Private Tour coach	9	5	2	22	41
Ferry	8	11	3	16	10
Taxi	5	9	2	9	12
Walk	3	-	3	-	-
Boat	3	-	1	-	-
Bicycle	2	2	2	3	-
Motorcycle	2	2	1	-	3
Motorhome	-	5	3	2	-
Plane	-	-	-	1	-

Notes to table

Source: Tourist Attitudes Survey 2005, VisitScotland

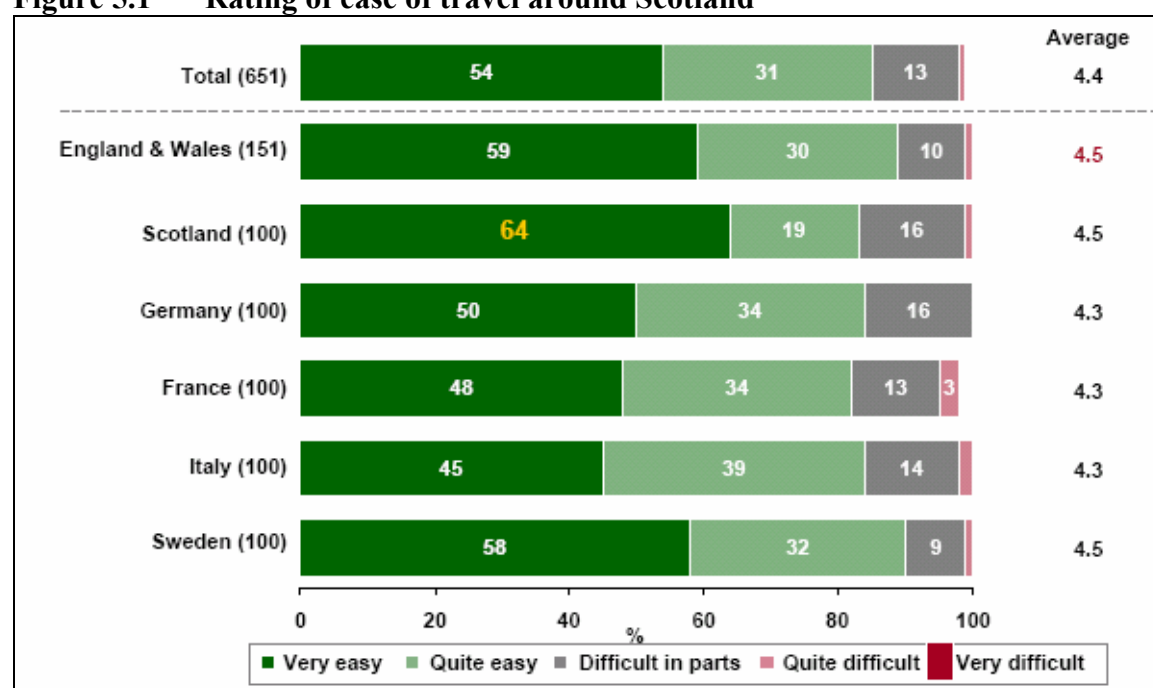
5.8 Clearly the sampling methods employed for the TAS survey may have influenced the findings outlined in Table 5.1, but without further detailed information on these, it is not possible to speculate on the extent to which the sample is representative of the population. However, these percentages appear to indicate that German visitors are the most likely to use forms of public transport (train, bus and longer distance coach), whereas visitors from France are the least frequent users of public transport, but the most likely to travel by road. Compared to other nationalities, a relatively high percentage of Swedish visitors appear to travel as part of a private tour coach. It is also clear from Table 5.1 that, with the exception of French tourists, public transport use is more prevalent among overseas visitors than domestic visitors.

5.9 Such differences across the nationalities surveyed in terms of the patterns of usage of modes of transport will influence satisfaction ratings. Public transport quality and availability is likely to play a more significant role in rating the ease of travel around Scotland for German, Italian and Swedish visitors, than it is for visitors from England, Wales and France. The latter are more likely to rate ease of travel on the basis of attributes associated with car travel, such as signing, lack of congestion and good quality roads.

5.10 Figure 5.1 depicts the ratings of visitors from outside Scotland on the question ‘How easy was it to travel around during your recent holiday?’. Responses are rated on a scale of 1 to 5, 5 signifying ‘very easy’. The mean results, shown on the right hand side of the figure, indicate that, on average, visitors from all countries consider Scotland relatively easy to get around. Figure 5.1 indicates that Scottish domestic tourists holidaying within Scotland are the most likely to consider Scotland very easy to get around. This could, of course, be due to

the fact that local knowledge makes travelling easier, but also potentially the fact that they have the highest incidence of car use (81%) with less than 20% using public transport during their trip. Without further investigation, it is not possible to surmise whether use of public transport makes the destination less accessible. It is suggested that in future TAS exercises, a question might be included which allows this distinction to be made. It should further be noted here that the TAS data presents a limited picture of visitor experience and perceptions of public transport, questioning visitors at a very general level on the internal accessibility of the tourism product. In other words, what is measured here is the final outcome of the transport service, i.e. the visitor getting to where they actually want to go. Even where the outcome is satisfactory, the process, i.e. the speed and comfort of the trip, as well as intangible aspects such as ease of access to information and attitude of transport staff, may be less than satisfactory. This distinction should be borne in mind when interpreting the results of the TAS. Moreover, it is not clear how attitudes towards the cost of transport in Scotland might be involved in the ratings in Figure 5.1.

Figure 5.1 Rating of ease of travel around Scotland



Source: Tourist Attitudes Survey 2005, VisitScotland

Visitor Attractions Monitor (VAM) (Moffat, 2004)

5.11 The Moffat Centre for Travel and Tourism Business Development at Glasgow Caledonian University has been involved in the collation of data regarding the Scottish visitor attraction sector since 1999. Data is collated in two separate surveys:

1. An annual survey based on total visitation numbers, which also asks for qualitative information on a number of aspects. In 2004 1051 visitor attractions were contacted to participate in the research project. Some 765 operators returned the questionnaire, with 682 providing usable data.

2. A monthly survey that only asks a sample of visitor attraction operators for total visits to their attraction, and any qualitative comments they may have. Some 430 visitor attractions provided monthly data for the year 2004.

5.12 The definition of a visitor attraction for the purposes of these research projects was harmonised for the year 2000 data collation by all four national tourist boards¹ and excludes attractions that may be open by appointment only (such as many Historic Houses Association properties), leisure amenities such as cinemas, sports halls, swimming pools and shopping complexes.

5.13 One question in particular provides insights into visitors' experiences and perceptions of transport supply within Scotland. Question 2.9 on the annual survey of visitors to Visitor Attractions, illustrated below as Figure 5.2, requested qualitative responses concerning positive and negative factors influencing visitation, as compared with the previous year. It should be noted however, that the reliability and validity of these findings are questionable, due to the fact that it is the operator who makes the judgement on the factors that have affected total visitor numbers. The VAM does not include any primary research conducted on visitors to the attractions, nor is it clear whether the opinions of attractions operators, who complete the questionnaire, are based on research they may have conducted in house, or simply on the individual's overall knowledge of the business. It should be clear that these comments are therefore rather subjective, since they represent the views and wisdom of only one individual. At best, they can be regarded as representing the visitor attractions' views on tourists' perceptions and experiences of transport.

Figure 5.2 Question 2.9 Survey of Visits to Visitor Attractions 2004

<p>2.9 Please indicate which positive and negative factors you believe affected your total visits numbers in 2004 compared to 2003:</p> <p><u>Positive factors</u></p> <p>Most important factor: _____</p> <p>Other factors: _____</p> <p>_____</p> <p><u>Negative factors</u></p> <p>Most important factor: _____</p> <p>Other factors: _____</p> <p>_____</p>

5.14 Some 474 operators provided an answer to the above question in 2004. Transport related issues identified as positive factors in influencing visitor numbers included improved signage to individual attractions, whereas negative factors included the high cost of public transport and closures of main access roads (for maintenance work). Tables 5.2 and 5.3 show the results for both positive and negative factors. Percentages are calculated over the number of responses rather than the number of visitor attractions, so that one attraction operator may have provided more than one factor. These tables show that 2% of factors identified as having the most important positive effect on visitor numbers were transport related. A further three percent of responses in the 'other positive factors' category were also transport related. With regard to factors negatively influencing visitor number in 2004, the percentages

¹ '...an attraction where the main purpose is sightseeing. The attraction must be a permanent established excursion destination, a primary purpose of which is to allow access for entertainment, interest, or education; rather than being primarily a retail outlet or a venue for sporting, theatrical, or film performances. It must be open to the public, without prior booking, for published periods each year, and should be capable of attracting day visitors or tourists as well as local residents. In addition, the attraction must be a single business, under a single management, so that it is capable of answering the economic questions on revenue, employment, etc.'

are slightly higher, at 3% and 4% respectively. It can therefore be surmised that transport is considered by attractions operators to have a small but significant effect on visitor numbers.

Table 5.2 Positive factors influencing visitor numbers at Scottish attractions

Most Important Positive Factors	Sites	%	Positive Factors Receiving any Mention	Sites	%
Promotion / marketing	73	21	Promotion / marketing	90	19
Popular exhibitions / events	50	15	Popular exhibitions / events	68	15
Weather	37	11	Weather	48	10
New addition / refurbishment	32	9	New addition / refurbishment	38	8
Extended season / opening hours	17	5	Increase of group visits	21	5
Increase of group visits	16	5	Extended season / opening hours	20	4
Increase in UK / European visitors	13	4	Increase in UK/European visitors	14	3
The attraction itself	11	3	Friendly / supportive / helpful staff	13	3
Signage	8	2	Transport	12	3
Increased profile	8	2	The attraction itself	12	3
Free admission	6	2	Increased profile	11	2
More tourists	6	2	Signage	10	2
School / education	6	2	Local support	10	2
Transport	6	2	More tourists	9	2
Location	5	1	School / education	9	2
Friendly / supportive / helpful staff	5	1	Location	8	2
Local support	4	1	Free admission	8	2
Global issues	2	1	Global issues	5	1
Repeat business	1	0	Repeat business	4	1
N/A	4	1	Parking	1	0
Other Miscellaneous	32	9	N/A	4	1
<i>Total number of responses: 342</i>			<i>Total number of responses: 462</i>		

Notes to table

Source: Moffat, 2004

Table 5.3 Negative factors influencing visitor numbers at Scottish attractions

Negative Factors					
Most Important Negative Factor	Sites	%	Negative Factors Receiving any Mention	Sites	%
Weather	195	51	Weather	210	43
Closure / disrupted due to refurbishment / changes	41	11	Closure / disrupted due to refurbishment / changes	54	11
Poor / no signage	16	4	Poor / no signage	19	4
Generally less visitors	13	3	Competition	17	4
Transport - costs / links etc	12	3	Transport - costs / links etc	17	4
Competition	11	3	Generally less visitors	15	3
Location	10	3	Less USA / foreign visitors	15	3
Decline in promotions/advertising	8	2	Decline in promotions/advertising	14	3
Less hours / days / season	8	2	Global issues	14	3
Less USA / foreign visitors	8	2	Location	13	3
Global issues	7	2	Less hours / days / season	9	2
Scotland - expensive destination	6	2	Lack of local support	8	2
Admission charges	3	1	Scotland - expensive destination	8	2
Lack of local support	3	1	Staff - retirement / unavailable etc	6	1
Staff - retirement / unavailable etc	3	1	Carpark charges	4	1
Carpark charges	2	1	Admission charges	4	1
Decline of daytrippers	2	1	Lack of funding	4	1
High cost of fuel	2	1	Catering / retail unsatisfactory	3	1
Lack of funding	2	1	Lack of information	3	1
Catering / retail unsatisfactory	1	0	Decline of daytrippers	2	0
FMD	1	0	High cost of fuel	2	0
Uncertainty of future	1	0	FMD	1	0
N/A	5	1	Uncertainty of future	1	0
Other Miscellaneous	24	6	N/A	5	1
<i>Total number of responses: 384</i>			<i>Total number of responses: 483</i>		

Notes to table

Source: Moffat, 2004

5.15 Further qualitative data could be extracted from the VAM database in order to provide more detail on visitor perceptions and experiences of transport in accessing attractions, as reported by the attraction operator. For the purposes of this research, a number of ‘search’ words were entered such as ‘transport’, ‘remote’, ‘car’, ‘ferry’ etc. These are presented in Table 5.4 in the column entitled ‘Search Word’. It should be noted that a search on the words ‘remote’ and ‘toll’ was also carried out with no result. Of a total 945 comments in the database (roughly 50/50 positive and negative) 83 were extracted as being related to transport.

5.16 The Factor column indicates whether the influence of the factor was quoted by visitor attraction operators as being ‘Positive, Most important’ (+++); ‘Positive, Other’ (+); ‘Negative, Most Important’ (---) or ‘Negative, Other (-)’ as per question 2.9. In addition, Positive factors were colour coded in blue and Negative factors in green for ease of recognition. Each attraction has a unique identity number. This has been left in for the researchers’ use to refer back to the attractions. Location and visits range was also included by the Moffat Centre for cluster purposes, however there are insufficient attractions from any one destination to draw many inferences about the relationship between location of the attraction and adequacy of transport supply. The column entitled ‘Description’ details the text written by attraction operators on the questionnaire form itself. The table is presented in alphabetical order of attraction location, however there are insufficient attractions.

5.17 Several assumptions can be made from the comments reported in Table 5.4. Firstly, a not inconsiderable number of comments relate to the access to attractions by public and private transport. It is clear that the accessibility of the attraction, in terms of visitors transport experiences, is perceived as a very significant factor by visitor attraction operators. Secondly, it is notable that 57 of the 83 comments relating to transport are negative (69%), suggesting that many attractions operators perceive transport as a hindrance to their success, for a variety of reasons. Factors relating to visitors perceptions and experiences of public transport which were perceived to have had a positive effect on visitation levels included; opening of new routes, improved signage, and increased parking facilities. Meanwhile, lack of access by public transport, poor signage and road closures were cited among the negative factors. The frequent occurrence (more than 10% of the total) of cost related factors within this table is also noted. These cost factors relate to both public and private transport, with island locations being especially likely to cite cost as having a negative influence on visitation levels.

Table 5.4 Positive and negative experiences and perceptions of transport and accessibility affecting visitation levels at Scottish visitor attractions in 2004.

Search word	Factor	id	Location	Visits Range	Description
Location	---	1316	Aberdeen	10-50k	Limiting location
Bridge	---	945	Aberdour	5-10k	Roadworks on Forth Road bridge.
Location & Rural	---	215	Aberfeldy	10-50k	Rural location.
Ferry	+	215	Aberfeldy	10-50k	European ferry.
Car	---	524	Aberfoyle	100-500K	Less car trade.
Coach	+++	524	Aberfoyle	100-500K	More coach trade.

Coach	---	528	Aberlour	10-50k	Coach company stopped resting in the Speyside area – hence drop in numbers by 3%.
Coach	---	402	Alexandria	100-500k	Competition for leisure time – main competition coming from Lomond Shores channelling many visitors to the area straight to Lomond Shores including coach traffic.
Car	---	5	Alford	10-50K	Car parking charges at Haughton Park.
Transport & Bridge	---	87	Anstruther	50-100K	Fife road and transport system, closure of the Forth Road Bridge and weather.
Signage	---	868	Aviemore	10-50k	Poor signage, weak advertising.
Signage	-	1115	Balloch	100-500k	Limited signage and confusing building identity.
Car	---	187	Barra	<5K	Lack of car parking bays at front of centre.
Ferry	+	187	Barra	<5k	Vehicle ferry at the north end of island allows tourists to travel into islands.
Ferry	+	783	Blair Atholl	10-50k	Rosyth Ferry increased our menu and better advertising.
Transport & Public & Signage	-	878	Blairs	<5K	No public transport to the venue.
Signage	---	1087	Boat of Garten	5-10k	lack of road signage.
Car	-	437	Broughty Ferry	100-500K	Car parking fee / loch empty
Access	+++	259	Broxburn	100-500k	Opening of national route, reopening of viaduct access.
Public & Bridge	+++	248	by Dunfermline	<5K	Improved signing, publicity helped offset forth road about bridge weekend closures.
Coach	---	364	Caithness	<5k	Shearing coaches from Dornoch (5 weekly).
Coach	+++	364	Caithness	<5K	Coaches off to Castle of Mey – 57 coaches less.
Public	---	179	Canonbie	<5k	No signs allowed on public road.
Petrol & Price	---	333	Dalwhinnie	10-50K	Petrol prices.
Ferry	+++	333	Dalwhinnie	10-50k	Reputation, scenery, improved clients and ferry client.
Car	+	325	Dingwall	5-10K	Free car parking
Location	---	1098	Dornoch	5-10k	Poor location in town.
Coach	---	366	Dulnian Bridge	50-100k	Less coaches.
Signage	+++	929	Dumbarton	10-50k	Improved signage.
Isolation	---	339	Dumfries	<5k	Isolation
Coach & Location	---	175	Dundee	10-50k	Poor location in Dundee. Dundee not seen as a major tourist attraction. Problems attracting coach business.
Bridge	---	389	Dunfermline	<5k	Partial closure of Forth Road Bridge for repairs.
Bridge	-	609	Dunfermline	50-100k	Restrictions on Forth Road Bridge.
Bridge	---	940	Dunfermline	5-10k	Forth Road bridge closed.
Signage	-	1500	Falkirk	10-50k	Poor signage from Wheel.
Signage	---	573	Findhorn	<5k	Signage to the area could be improved.
Transport & Signage	---	209	Glasgow	5-10K	not in city centre / signage / transport
Location	---	403	Glasgow	10-50k	Location
Access	+	403	Glasgow	10-50k	Ease of access.
Access	+++	501	Glasgow	100-500k	Improved access to museum and Glasgow Green.
Location	+++	999	Glasgow	10-50k	Location
Public & Access	---	627	Hawick	5-10k	Access improvements meant disruption and limited access for public from Jan-May05.

Coach	---	377	Inveraray	50-100k	No dropoff point for coaches.
Car & Public	+	377	Inveraray	50-100K	New public carpark.
Signage	+++	127	Inverbervie	<5k	improved signage in carpark.
Signage	+++	563	Inverness	10-50k	Improved signage, redecorated, regarded from 2 to 3 star.
Coach	+	896	Inverness	50-100k	Increase in coach trade.
Ferry	---	489	Isle of Iona	50-100k	Poor weather, ferry cancellations.
Transport & Ferry & Cost	---	793	Isle of Jura	<5K	Cost of transportation to Jura especially cost of Islay/Jura, ferry link.
Coach	---	891	Isle of Lewis	10-50k	Downturn in coach trade.
Cost	---	993	Isle of Lewis	<5K	Some potential visitors were put off by the cost.
Bridge & Cost	-	71	Isle of Skye	<5k	high cost of Skye bridge
Signage	---	628	Jedburgh	5-10k	inadequate signage
Coach	---	322	Kelso	10-50k	Fewer coaches but getting better.
Bridge	---	480	Kinross	50-100k	Forth bridge closure.
Access	---	1108	Lanarkshire	<5k	poor state of access road and official signs
Signage	---	126	Laurencekirk	5-10k	Poor signage.
Coach	---	310	Moray	11122	Lots of coaches to Tomintoul area.
Coach	+++	897	Moray	50-100K	Major increase in coach trade.
Transport	+++	258	Motherwell	10-50K	School workshops with free transport.
Petrol & Cost	---	488	Motherwell	>1M	Petrol, fuel costs.
Ferry	---	107	North Uist	10-50k	Ferry charges.
Signage	+++	309	nr Ballater	10-50k	Brochures and signage
Coach	+++	106	nr New Galloway	50-100K	coach parties starting using centre – not pre-booked
Ferry	---	15	Orkney	10-50k	Spaces available on ferry to get here.
Coach	+	444	Orkney	10-50k	More coach groups.
Transport & Cost	---	687	Orkney	<5K	Transport costs.
Ferry	---	1483	Orkney	<5k	Poor ferry service.
Transport & Cost	-	772	Patna	<5K	Cost of transport for school visits.
Coach	+++	645	Pitlochry	10-50K	Increased coach visits, growing market and East European visitors.
Signage	-	921	Port Glasgow	<5k	Bad signage.
Cost	---	168	Shetland	<5K	Travelling costs.
Coach	+++	877	Shetland	<5K	Many more coach tours.
Cost	-	1068	Shetland	10-50k	Cost to Scotland and poor weather.
Coach	---	800	Tomatin	10-50k	Coaches cancelled due to low numbers.
Signage	---	923	Uddingston	5-10k	Poor signage.
Cost	---	117	Unst	<5K	Cost of reaching Shetland.
Coach	+++	787	Whithorn	5-10K	Coach visits
Signage	+++	1105	Wick	<5k	Better signage.

Notes to table

Source: Visitor Attractions Monitor 2004

Cairngorms National Park Visitor Survey (Lowland Market Research, 2004)

5.18 The report on the above survey, previously discussed in Chapter 4, gives an indication of visitor satisfaction with the transport network and the link with destination satisfaction through comments on likes and dislikes and rating of facilities. However, this information is brief in nature and rating scales unfortunately do not disaggregate the responses of visitors from those of local residents. It can be seen from Table 5.5 that, of the facilities which visitors and residents were asked to rate within Cairngorms National Park, public transport accounted for the highest percentage of ratings at the lowest end of the scale ‘very poor’. However, average ratings have not been calculated for each of the facilities.

Table 5.5 How would you rate the following facilities in the Cairngorms area?

	Very good	Good	Average	Poor	Very poor	Not visited/ applicable
Signposts	27%	49%	9%	4%	1%	11%
Provision of car parks	21%	58%	5%	2%	0%	13%
Condition of paths and tracks	20%	52%	7%	2%	0%	20%
Numbers of public toilets	9%	36%	19%	11%	2%	23%
Cleanliness of public toilets	13%	40%	16%	6%	1%	24%
Picnic areas	15%	42%	8%	2%	0%	32%
Public transport	2%	5%	4%	7%	9%	74%
Information boards	18%	53%	8%	2%	0%	19%

Notes to table

Source: Cairngorms National Park Visitor Survey

5.19 As regards ratings of public transport within Cairngorms National Park, the report claims that 16% of respondents state these are poor or very poor, although quite how this figure tallies with Table 5.5 is unclear. Moreover, when responses to the question are recalculated to only take into consideration those respondents who have used the transport facilities in question, 62% stated that they are poor or very poor. In other words, of those who used public transport within Cairngorms National Park, 62% had negative experiences of the service. However, it must be pointed out that, whilst 31% of residents indicated that public transport within the park was either poor or very poor, only 5% of people on a longer break, the category within which overseas visitors are best represented rated public transport below average. Thus it would appear that visitors to the park have considerably more positive experiences and perceptions of public transport within that area than residents. The findings reported in Table 5.5 suggest that satisfaction with private transport facilities within the park is considerably higher, with a high percentage of visitors and residents rating parking provision and signposting either good or very good.

Data from transport operators reporting visitor perceptions of transport

Trossachs Trundler (Lancashire Business School, 2004)

5.20 The Trossachs Trundler has been placed in this section since it can legitimately be described as a transport service rather than a visitor attraction. However, it should be noted that the service is provided in conjunction with the Trossachs Bus Walks project, funding for which originates from a number of public sector organisations within the Trossachs region.

The report was commissioned by Loch Lomond and the Trossachs National Park Authority and not by the transport operator, Harlequin Coaches. The Trossachs Trundler study was carried out by Lancashire Business School.

5.21 The Trossachs Trundler is a seasonal bus service which has operated during the summer months since 1993, linking a number of visitor attractions throughout the Trossachs. The service is discussed in Paragraph 5.87 below as an example of good practice in transport for tourism in the Trossachs area.

5.22 The Trossachs Trundler study had two principle objectives:

- to evaluate the Trossachs Trundler service and marketing and promotional materials associated with the service,
- to interview current non-users of the Trossachs Trundler service and identify the factors that would make them more amenable to using the service in the future.

5.23 A variety of primary research methods were employed for the investigation, including a ‘mystery shopper’ exercise in which a researcher used the Trundler service and undertook one of the advertised associated bus walks. Other methods used included discussions with tourism service providers, telephone interviews with Tourist Information Centres (TICs) in the area and a survey of tourists using the car park at the Loch Katrine Visitor Centre. Of the above methods, the mystery shopper exercise proves the most useful in evaluating the quality and adequacy of this particular transport mode from the visitor perspective. Before outlining these findings, it is important to put the research into context. It should be noted that the Trossachs Trundler is marketed as a form of leisure transport, if not entirely tourist dedicated. Although its route and pricing structures are designed to specifically appeal to visitors to the Trossachs area, it is, however, also valued by local residents in an area where the local bus service is very thin. It might be expected that a service that is specifically marketed for tourism and recreation purposes would be more likely to make a positive contribution to the visitor experience, than a regular service bus. Secondly, the mystery shopper evaluation of the Trundler service must be considered subjective as it based on the experience of one researcher and not on the perceptions of a wider sample of visitors and/or passengers. Thirdly, the report does not provide any indication of the geographical breakdown of passengers using the Trossachs Trundler. It is therefore not possible to estimate the degree of use of this service by visitors from outside Scotland.

5.24 The report on the mystery shopper experience criticises the format of displays at the bus station in Stirling as the service was not easy to find and board. It is also felt that stops along the route should be more prominent and that shelter should be provided from the weather. Whilst the mystery shopper found the bus clean, if ageing slightly, concerns were raised over the small size of the vehicle and the facilities for carrying bicycles and wheelchairs. The report praises the relaxed pace of the journey, the attractive scenery and the fact that the timetabling accommodates those wanting to take a Loch Cruise, however the communication between organisations, the lack of inclusive tickets covering the bus and visitor attractions and the lack of incentive discounts for bus users are highlighted as areas that should be addressed. Moreover, there was some indication, based on information gleaned during interviews and discussions with service providers in the area, that problems existed with ticketing, the lack of cycle provision and inconsistencies in the service standards of drivers, all of which, in the past, had led to dissatisfaction on the part of visitors, and had been reported to the local TICs.

5.25 Whilst the mystery shopper experience only provides an account of the performance of one survey on a given day from the point of view of one researcher, the comments on and criticisms of the service, in conjunction with the remarks of service providers and the TIC, make a valuable contribution to any efforts to improve visitor services within the Trossachs area.

Travel Dundee (TARP Limited, 2005)

5.26 In June 2005 TARP Limited conducted a customer satisfaction survey for Travel Dundee, part of National Express Group plc. Travel Dundee own a fleet of around 130 buses and coaches and are the major operator of local bus services within the City of Dundee. The company's coaching subsidiary, Travel Greyhound, operate coach services throughout the United Kingdom and Europe. The survey obtained 368 responses from passengers of Travel Dundee. A summary of the data from this survey has been made available, but the dataset itself was not accessible. Unfortunately, the origin of respondents has not been measured. However, the survey does disaggregate passengers by main usage purpose, thus it is possible to distinguish between leisure visitors and those travelling for work or study purposes or on personal business. In total, 49% of the Travel Dundee passengers surveyed were travelling for leisure purposes, although in 19% of cases, this involved travelling to see friends and relatives, rather than on a day out. Leisure visitors appeared to be, on average, more satisfied with the overall service received from Travel Dundee. On an index of 1-100, those on a leisure trip rated the satisfaction levels on average at between 75 and 82. Commuters and business travellers, by contrast, rated their overall satisfaction at between 63 and 73 out of 100.

Virgin Trains (Virgin Trains, 2005)

5.27 Virgin trains are one of the key providers of intercity rail travel in the UK and afford access for visitors to Scotland from England and Wales, including visitors from overseas arriving via these two countries. Between February 2005 and January 2006, a customer satisfaction survey was conducted for Virgin Trains by Synovate UK. Data from this survey has been extracted for a sample of 121 passengers on outbound journeys from England to Scotland or on return journeys from Scotland to England. Of the total passengers surveyed, 50% are travelling for leisure purposes and 36% for business purposes. Only 4% are from overseas. The satisfaction ratings can therefore principally be attributed to domestic visitors to Scotland, however, all respondents can be classified as visitors to Scotland. The data is also disaggregated to show business, commuting and leisure trips. 50% of the sample were travelling to Scotland for leisure purposes, 36% on employer's business, 4% were commuters and the remaining 10% either did not answer the question or were travelling for other purposes.

5.28 Satisfaction ratings are available for no less than 51 different aspects of the journey experience, including some of the key indicators of public transport satisfaction, such as reliability, speed and customer service. Whilst a full analysis of such extensive data is beyond the scope of this report, it is useful to provide an overview of the findings, identifying the key differences between leisure/business and overseas/domestic visitors in terms of the satisfaction rating.

5.29 As regards overall satisfaction with the journey experience (including planning the journey and the onboard experience) overseas visitors are, on average, better satisfied than visitors from England and Wales. This finding echoes the results of surveys discussed elsewhere in this section and reinforces the observation that domestic visitors are most likely to express dissatisfaction with destination transport services. It should, however, be pointed out that overall satisfaction levels with the journey are relatively positive, business travellers expressing the lowest average level of satisfaction, 7.0 on a scale of 1-10.

5.30 Aspects of the journey which overseas visitors rated considerably lower than domestic visitors include the following:

- Satisfaction with being able to rely on timetabled services not being cancelled
- Satisfaction with the helpfulness and knowledge of the staff you contacted
- Satisfaction with the ticket you bought meeting your requirements (e.g. the best value/the fastest route)

5.31 Two of these variables relating to accessibility of public transport for overseas visitors will be examined further in Paragraphs 5.73 to 5.86 of this report. Overseas visitors were particularly satisfied with aspects of the stations they had used, including the helpfulness of station staff, accessibility and cleanliness of the station and personal safety within the station. They also tended to express greater levels of satisfaction with the comfort and cleanliness onboard the trains than domestic visitors and were highly satisfied with the ability to store luggage onboard.

5.32 There were also notable differences between leisure and business travellers with regard to their levels of satisfaction on particular variables. Business travellers were considerably less satisfied than leisure visitors with the following aspects of the journey:

- Speed and efficiency of response to problems by staff;
- Car parking facilities at stations;
- Cleanliness of stations, train carriages and toilets;
- Time spent waiting to purchase ticket.

5.33 Leisure visitors were, on average less satisfied with luggage storage facilities on board the train and with the level of knowledge of staff whom they contacted for information about their journey. Overall levels of satisfaction with the journey, however, were almost identical.

5.34 The survey conducted by Synovate UK on behalf of Virgin Trains points to good practice in the measurement of passenger satisfaction with inter city rail services. Unfortunately the number of passengers from overseas within the sample is rather small, but nonetheless probably representative of the proportion of Virgin Train's customers from overseas over the period of the survey. The fact that the survey distinguishes between business and leisure travellers is very helpful, access to the data set would allow a cross analysis of the grouping variables (e.g. domestic leisure visitors), which may be of interest from a tourism perspective.

5.35 The above section has reported on qualitative and quantitative data which provides some insight into visitors' experiences and perceptions of transport supply in Scotland.

However, it should be clear from the above discussion that there is a distinct lack of research within this area. It appears that any research which has taken place is at a fairly general level and has not attempted to investigate in detail the specific attributes and dimensions of transport performance which influence visitor experiences, perceptions and levels of satisfaction. Moreover, the studies are localised, referring either to the case of a very specific transport service, or a distinct area of tourist activity. It is not possible, for example, to distinguish whether experiences and perceptions of transport differ across the modes or within different regions of Scotland. Nonetheless, some detail has been provided not only on the types of research taking place within this area, but also on the positive and negative experiences and perceptions of transport from the visitor perspective that have been recorded throughout Scotland.

Potential relationship between satisfaction with transport provision and satisfaction with Destination Scotland

Tourism Attitudes Survey (VisitScotland, 2005)

5.36 The Tourism Attitudes Survey was discussed above in Paragraph 5.5 in relation to overseas visitors' satisfaction levels with transport provision. This survey also provides us with an insight into the way in which transport impacts on destination satisfaction. The research attempts to establish an overall impression of the holiday experience in Scotland, listing the most frequently cited holiday highlights and disappointments. The survey revealed that 2% of all respondents (overseas and domestic) questioned were disappointed with public transport provision in Scotland and 4% did not enjoy travelling.

5.37 All nationalities surveyed, with the exception of the French, cited travelling around Scotland as one of the most disappointing parts of their holiday. However, the percentages were relatively low, with more visitors from England and Wales being dissatisfied with this aspect of their holiday than other nationalities. In the case of German visitors, four factors relating to transport appeared in the list of disappointments: travelling, public transport, price of petrol and damage to car. A percentage of French and Italian visitors were also disappointed with public transport and with the roads in Scotland. 3% of Swedish visitors stated that they were disappointed with sign posting in the Scotland. By contrast 6% of German visitors, 4% of those travelling from England and Wales and 3% of those from France commented that walking and hiking was a particular highlight of their holiday. Clearly, however, in many instances respondents may have chosen to partake in a walk simply as a leisure activity rather than as a mode of transportation from one destination to another. Although the numbers of visitors citing transport related factors as a disappointment are fairly limited, the survey does appear to establish a link between dissatisfaction with transport and satisfaction levels with Destination Scotland.

5.38 Some further, destination specific data can be added to this picture from the TNS survey for Greater Glasgow and Clyde Valley Tourist Board (GGCVTB) conducted in 2003/2004 of 1350 visitors to the Tourist Board area (TNS, 2004). Since access to the data was not granted, it is not possible to distinguish clearly between domestic and overseas visitors, however 35% of respondents are known to be from outside Scotland. The number of VFR and holiday makers is much greater among this group, with Scottish respondents being overwhelmingly day trippers.

5.39 The survey included a question which allowed respondents to comment on their likes and dislikes regarding Glasgow (TNS, 2004). Transport again featured among these, but the picture was rather more positive for public transport than private. 6% of respondents cited good transport as one of the things they liked about the area, whereas 4% identified poor transport as a dislike. It would be interesting to examine the data set further, to establish any differences between overseas and domestic visitors in this question. As regards road transport, signposting was considered poor by 3% of respondents, and 10% declared that one of their key dislikes about the area was road congestion. Over a third of the sample had used a private car within the area (37%) whilst 10% and 7% had used bus and subway.

Examples of good practice in enhancing the visitor transport experience in Scotland

5.40 It is not the purpose of this section to highlight or promote successful transportation management projects. Nor will specific illustrations of good practice by transport and tourism operators be discussed here. Such examples were provided in Chapter 4, as part of the discussion on the scope and limitation of transport provision for visitors. The aim of this final part of this chapter is to review examples of good practice in research towards enhancing the visitor transport experience. Three salient reports are reviewed, two commissioned by Scottish Natural Heritage, the other by Cairngorms National Park. Each of these reports examined aspects of public and private transport in rural areas of Scotland, with a view of improving both accessibility and visitor satisfaction with transport for leisure purposes.

The View from the Road (David Jarman, Rural Landscape Enrichment, 2005)

5.41 An interesting example of transport being evaluated in relation to user/visitor satisfaction is highlighted by The View from the Road report, which was commissioned by Scottish Natural Heritage following increasing recognition that roads have become important features of the landscape. The study aimed to assess the 'View from the Road' seen by motorists travelling through the Scottish countryside (townscapes etc. were excluded) by presenting a number of detailed examples. For the purpose of the initial investigation, the A82 from Glasgow to Inverness was adopted as the object of the research. The report is based on the interview responses of more than 50 people acting as representatives of key public and private sector interests in the area as well as the conclusions of a workshop attended by over 30 delegates. The scoping study also explores the feelings of key stakeholders towards the concept of 'View Management'. However, it is stressed that the idea will only develop if wide partnerships are formed and maintained.

5.42 The study found that, in many instances, picturesque scenery was obstructed by vegetation and concluded that this could be seen to detract from the tourism product. Conifer afforestation was viewed as a particular problem, although it is said that this has been recognised for some time and is now being addressed through a variety of measures including clear felling, selective felling and increasing the distance between the roadside and plantation, thereby enabling motorists to admire the landscape. On the other hand, the potentially obstructive natural regeneration of native species was found to be a relatively recent phenomenon which is poorly understood. It is proposed by the report that eventually natural regeneration may evolve beyond a density where views are obscured and that traditional woodland management practices may accelerate this process.

5.43 The report also regards as important the ability of visitors and locals to stop and properly admire the Scottish countryside. Questions are raised concerning viewpoints and the provision of roadside amenities, including tourist information, public toilets and dining facilities. It is noted that, while this is an area in which many agencies show considerable interest, there is no obvious organisation to take the lead in developing and implementing policy. Several good examples of ‘scenic pull-offs’ and future opportunities are highlighted and questions over the maintenance of such facilities are raised. Comparisons are also drawn with other European countries where it is now common to find a variety of commercial ventures at scenic locations.

5.44 It is suggested that ‘View Maintenance’ could have an influence on the sustainability of the tourism industry as the pace of travel could be slowed, allowing people to appreciate the area and stop more often thereby covering less distance in the course of the visit and necessitating a return trip. It is also believed that investment in the scenic product would aid regional development through increased visitor spending, promotion of road safety and access to the landscape.

5.45 The report goes on to consider the concept of View Corridor Management Plans (VCMP) which were welcomed by the majority of those involved in the study. It was proposed that VCMP’s may comprise an evaluation of the route character and highlights and the views observable whilst travelling along measures to develop stopping places and aid rural regeneration. The report states that there is a strong argument for the development of both bottom-up and top-down management strategies as local strengths could be supported and reinforced by national standards tourists could rely on. The group also supported the principle of a ‘Scottish Collection’ of iconic views to be promoted as a package.

5.46 The report then explores the potential sources of funding for view management plans, further research that would be of benefit to such initiatives and the possible locations of a pilot scheme. As some major improvements can be made with little need for research, consultation, legislation or funding, the study advocates immediate action in this area.

5.47 The report highlights routes across the country that are seen to be of value to visitors, without commenting on the volume of visitors travelling on such roads. Attention is also drawn to the fact that very little comprehensive data exists to assess what visitors think of the views they see when travelling. It is hence not possible, from the evidence presented, to assess intangibles such as visitor satisfaction with a roadside view.

5.48 The report and the examples contained purposely focus on the A82 route and are not, therefore, representative of Scotland as a whole. It recognised that different types of road in other locations will require different measures to enhance the satisfaction of visitors and that future investigation of this issue will be necessary. However, the themes raised by the report are considered important, particularly due to the high percentage of visitors travelling around Scotland by private and hire car.

Transport, Tourism and the Environment (Transport for Leisure, 2000)

5.49 A further report commissioned by SNH has relevance to good practice in research towards enhancing the visitor transport experience, though its key focus was on limiting the economic, environmental and social impacts of tourism and tourist related transport in the Scottish countryside. The report, entitled 'Transport, Tourism and the Environment in Scotland' was undertaken by Yorkshire based consultants Transport for Leisure Ltd and Roger Smith the outcome being a series of recommendations regarding the future role SNH should play in research, policy development and action with regard to tourism, transport and the environment.

5.50 The report defined 'Leisure Transport' as "any journey which is made by a visitor into the Scottish countryside either to access that countryside for a leisure activity or as a leisure experience in itself" and the term 'visitor' was used to refer to "someone who travels ten or more miles away from home" (p9). However, there does appear to be some inconsistency in the use of such terms with 'tourist' and 'tourism related transport' being used in some instances.

5.51 The report begins by commenting on the subject of leisure travel at the global, national and local level, quoting figures from sources such as the DETR: Transport Statistics and British Social Attitudes survey as evidence of the increasing importance of air travel and growth of car ownership and use. Whilst there is acknowledgement of the environmental impact of air travel, the fact that much of it occurs as a result of international flights outside Scotland is seen to place the issue largely out with the scope of the study thereby justifying the focus on car travel.

5.52 The principle impacts of car travel on the environment and other road users are categorised and examined in turn, beginning with air pollution followed by visual pollution, noise pollution, increasing numbers of accidents and 'accident-risk fear', seen to deter other road users such as walkers and cyclists, and congestion.

5.53 While discussing visitor expectations the report makes a distinction between 'Pale Green' and 'Deep Green' visitors. Pale Green visitors are described as those who travel by whatever mode is seen to be the most convenient, inexpensive and practical (p10). It is suggested that, given the correct publicity and motivation, such people could be persuaded to walk, cycle or use some form of public transport as an alternative to the private car.

5.54 Deep Greens, described as those "who by necessity or choice, do not own or use a car, or who are prepared to leave their car at home for the day and travel the whole way by bus or train" (p12) are viewed as a particularly important group in terms of long term behavioural change.

5.55 It is suggested that an extensive and reliable public transport network is required, combining rail, bus and boat services, allowing visitors to explore the whole of the country. Quality information, enabling connections, clean and spacious vehicles, and multi-modal rover tickets which can be pre-booked are also recommended. The authors believe that existing public transport networks can, in many instances, provide visitors with excellent access to the countryside, but these need to be effectively publicised. This is seen to make sound economic sense but it is also noted that dedicated tourist services may be necessary in some instances.

5.56 The second section of the report begins with a brief overview of tourism in Scotland followed by a similar summary of the walking and cycling market using 1999 figures provided by the Scottish Tourist Board on the ScotExchange website. Cycle touring, where the visitor cycles between accommodations on a daily basis, is mentioned but no figures are provided suggesting a lack of research in this area.

5.57 A brief overview of travel to and within Scotland is provided using DETR Transport Statistics, the National Travel Survey and Scottish Executive Transport Statistics. The lack of detailed local data and formal research is once again highlighted, as is anecdotal evidence concerning the negative impact of leisure travel in the countryside. For example, in summer months and at busy weekends traffic congestion and parking problems are frequently reported on the shores of Loch Lomond, in highland settlements such as Fort William, coastal resorts such as Girvan and in the heritage towns of Stirling and St Andrews.

5.58 In conclusion the report draws attention to the “complex and contrasting patterns of provision and promotion of public transport in Scotland” (p31). It is suggested that SNH should view the promotion of existing services to the leisure market as a top priority, working to build partnerships between stakeholders and to integrate transport provision into wider visitor management strategies (p31).

5.59 The report moves on to provide an overview of transport provision in different regions of Scotland, reporting the current situation and highlighting good practice and opportunities for future development. In this section the Northern and Western Isles, the Highlands, Stirling Council area, Fife, Strathclyde and the Borders are looked at in turn. A number of best practice examples in the provision of transport for leisure are cited by the report, including the Western Isles integrated Bus Network, which in April 1999 won the annual award of the Institute of Logistics and Transport for Passenger Transport Operations. Further examples include the Great Days Out scheme run by Strathclyde Passenger Transport, which offered tickets combining travel with admission to specified visitor attractions, and the Trossachs Trundler buses, discussed above in Paragraph 4.45.

5.60 SNH has limited direct influence over transport services within the Scottish Countryside, and the report recommends that SNH should involve itself primarily in;

- Research (including demonstration projects)
- Advice
- Grant Aid

5.61 Discussion with a representative of SNH indicates that study reports a position that continues to be supported by the organisation, however as the report is now a number of years old, some of the information it contains may now be out of date.

Loch Lomond and The Trossachs National Park People Movement and Transport Management Study (WS Atkins, 2002)

5.62 Immediately prior to the establishment of the Loch Lomond and the Trossachs National Park, WS Atkins were commissioned to undertake a People Movement and Transport Management study with the following aims:

- To provide an overview of the current strategies and policies, infrastructure and areas experiencing transport pressure;
- To identify gaps in policy, knowledge and infrastructure requiring attention by the future National Park authority; and
- To identify ‘hot spots’ within the area where transport management solutions are required and propose action plans to address the transport problems of these areas.

5.63 The findings of this report are now rather dated, since various of the measures recommended by the report have been actioned. The nature of the study as an example of good practice is thus interesting, rather than its actual conclusions.

5.64 The report commences with an outline of the existing transportation conditions within the National Park area and identifies key transport related issues, such as the relative inaccessibility of the park and its visitor attractions by public transport and locations of congestion during summer months. A set of transport policies for the park are defined and the importance of encouraging the inclusion of park specific transport policy statements in the relevant policy documents is highlighted. A series of key transport objectives for the park are recommended including:

- Reduction of the impact of visitor traffic upon the National Park;
- Increase in the use of non-car transport for access to/from and travel within the National Park; and
- Positive encouragement towards more sustainable transport use.

5.65 The report draws attention to the need to build a knowledge base regarding transport in the park before details objectives can be defined, but proposes an initial strategy based on the following approaches:

- Build upon existing resources and facilities, particularly public transport services;
- Maximise opportunities for interchange and interconnection between transport modes and services;
- Provide improved information and signage in an integrated manner to enable increased travel choice; and
- Collect and collate data to develop a clear understanding of current transport provision, usage and problems.

5.66 Funding sources are suggested and an action plan is proposed to progress the recommended actions, including the preparation of funding applications. Crucially, the report identifies key opportunities created by the establishing of the new National Park, particularly the opportunity to provide a framework for transport, tourism and recreation and the opportunity to improve coordination of management and joint working between all organisations with responsibilities for, and involvement in, transport and tourism within the park.

Cairngorms Sustainable Tourism (The Tourism Company, 2005)

5.67 In Scotland’s second National Park, the Cairngorms National Park Association (CNPA) commissioned The Tourism Company to produce a draft Sustainable Tourism

Strategy and Action Plan for Cairngorms National Park in association with the ViSIT (Visitor Services, Information and Tourism) Forum. The report was published in March 2005. A key objective of the report was to suggest a framework within which the Cairngorms National Park Authority (CNPA) and its partners might work together towards the successful development and management of tourism in the Park.

5.68 Accessibility and transport within the park was given particular consideration in the report and the findings suggest ways of enhancing the visitor transport experience whilst increasing movement around the park and distributing the benefits of tourism.

5.69 Poor public transport within the Cairngorms National park area and high fuel prices were seen to be a key weakness of the area. Although the Cairngorms is relatively accessible by car from Scotland's main centres of population and public transport to and from the Park was considered reasonable, movement within the Park via public transport was perceived by the report to be very difficult. The report refers to the Cairngorms National Park Visitor Survey (see Paragraphs 5.18 – 5.19 above) which established that 62% of visitors to the park felt that public transport was either poor or very poor. The North East and South East of the park were perceived to be particularly inaccessible.

5.70 A visitor management strategy was proposed by the report “to encourage an optimum flow and spread of visitors across the Cairngorms and minimise social and environmental impact and congestion from visitors and traffic generated by tourism”.

5.71 The report made the following recommendations regarding the management of visitor flow within the park:

- Consider the needs of tourism in the context of a Park management and transport plan
- Monitor visitor and traffic volumes and movements, especially at peak times
- Promote visitor use of existing public transport and improve it where possible
- Promote public transport options to potential and existing visitors, especially for consideration on return visits.
- Encourage information services and individual enterprises in the main local centres to identify and promote circuits using public transport.
- Promote public transport based excursion packages from main population centres such as Aberdeen and the central lowlands.
- Identify gaps in provision and timetabling on routes that might be used by tourists, and investigating possibilities for improving the service, including strategic use of public subsidy.
- Encourage exploration by foot, cycling, riding and on water
- Develop walking packages, single journey, from place to place or centre based.
- Extend cycling provision and packages.
- Extend opportunities for carrying cycles on trains and buses.
- Research the feasibility of dedicated transport to facilitate non-car exploration, e.g. dedicated shuttle bus for visitors.
- Engage in active dialogue with coach operators
- Investigate needs and interests of coach operators through dialogue
- Examine routes used, toilet provision and parking practices, environmental management and purchasing policies etc.
- Produce coach drivers' area information handbook.

5.72 The report notes the complex network of public sector organisations involved in supporting tourism within the Cairngorms National Park (CPNA, Area Tourist Boards, Local Tourism Associations and the Local Enterprise Companies) and particularly highlights the role of local councils with respect to infrastructure and transport, underlining the fact that local councils within the Cairngorms National Park have retained planning powers. The report stresses the need for communication, co-ordination and cooperation in achieving the recommended visitor management strategies.

Information and the Accessibility of Public Transport to the Visitor

5.73 The decision to use public transport is considered to be based on perceptions of the following six attributes (Hovell *et al.*, 1975):

- Price;
- In-vehicle time (duration of trip, speed);
- Mesh density (route coverage and access to stops);
- Frequency;
- Reliability ;
- Comfort.

5.74 However, perceptions of these six service attributes are argued to be influenced by available information and promotional tactics, particularly in the case of non-local and first time users. Likewise, Kittleson and Associates *et al.* (1999) contend that the usability of public transport is assessed on the basis of four attributes, one of which is *information availability* (the availability of adequate and accurate information). A study by Railtrack (1998) provides an indication of the importance of a range of attributes in influencing the decision to use public transport. Information fell sixth in a list of ten attributes, cited by 29% of respondents.

5.75 Information was one of eight attributes found to be quality indicators for public transport by a major project on public transport benchmarking, funded by the European Commission under the transport programme of the European Union's Fourth Framework Programme for Research, Technological Development and Demonstration (see Quattro, 1998). Information was also shown, by the same project, to be one of the service quality attributes most often included in the customer evaluation surveys of European public transport operators (Quattro, 1998). Indeed information may play an even more important role for overseas visitors than it does for local users of an urban public transport service.

5.76 Visitors may be wholly unfamiliar with the local transport system and may therefore require supplementary or different types of information to those generally available. Certainly, the amount, type, time and location of information required by overseas visitors is likely to be different to that favoured by local users. For example, visitors may place greater importance on the availability of information in advance of arrival and they may desire information to be available in a variety of languages. Furthermore, the availability of public transport customised for the tourist and integrated with attractions information may also be valued. Certainly there is evidence, as outlined above in this chapter, to suggest that information is one of the factors affecting satisfaction with destination Scotland. Moreover, in the Virgin Trains customer satisfaction survey discussed in Paragraphs 5.27 to 5.35 above,

it emerged seems that commuters were more likely to rate information provision highly, indicating that info sources are not as readily available to less frequent users of the service.

5.77 Studies of bus passengers' use of bus services have shown that differences exist in the types of information required by regular and occasional users of services; regular users tend to rely on experience and seldom use information sources, whilst occasional users depend, to a large extent, on friends or telephone enquiries for information (Blackledge, 1992). Furthermore, where a journey is to be made for the first time, a considerably higher percentage of bus users require information before and during the journey (Balcombe and Vance, 1998). For example, Balcombe and Vance (1998) found that 48% of passengers making a new journey require information on where to alight. This information is required by only 1% of regular users (see Table 5.30).

Table 5.30 Information required by bus passengers before making a journey

Type of information required	Percentage of respondents requiring information		
	Regular journeys	Occasional journeys	New journeys
Departure time	18	31	79
Frequency	6	10	50
Bus number	5	9	61
Fares	3	6	39
Arrival time	3	6	40
Bus route	2	3	39
Journey length	2	1	25
Boarding point	1	3	53
Alighting point	1	3	48
Ultimate destination of bus	1	1	19
Changing point	1	2	41
No information	80	66	7

Source: Adapted from Balcombe & Vance (1998)

5.78 More critical for the overseas visitor are the usefulness and intelligibility of available information. van der Berg *et al.* (1995) highlight the fact that public transport in tourist destinations is not easily accessible for foreign visitors, specifically noting the lack of public transport information in foreign languages. Overseas visitors may, for example, be unwilling to utilise telephone information lines due to lack of confidence in the English language. This problem is exacerbated where the principal attractions of a destination are spread over a broad geographical area. Recognition of the need to provide comprehensive transport information for the tourist has been demonstrated at national and international level. A report published by the World Travel and Tourism Council (WTTC) in 1997 applied the sustainable principles of Agenda 21 to the travel and tourism industries and advocated improved provision of information for tourists to encourage the use of public transport at the destination (WTTC, 1997). More recently, the ETC has recognised the potential to influence tourist travel through the provision of effective information (ETC, 2001) and the Scottish Executive has highlighted the importance of multilingual information and ticketing facilities (SE, 2006).

5.79 However, the significance of the use and usefulness of public transport information from an overseas visitor perspective remains unexplored. One useful study of the use of ICTs by Tourist Information Centres (TICs) has identified the need to establish visitors' information requirements and to ascertain the best means of providing this information to the visitor (Connell and Reynolds, 1999). This principle can clearly be applied equally to public transport information. TICs play an important role not only in providing information for the visitor, but also in arranging guided tours and walks throughout the destination. Furthermore, the larger the destination is, the more effective tourist signposting and way-marking needs to be.

5.80 Findings from a study of overseas visitors use of transport information in Manchester show that respondents were more likely to have used TICs to access public transport information than the public transport information centres, despite their geographical proximity (Thompson, 2004). It was found that visitors tended to use more than one source of public transport information and that local people were a very important source of public transport information (see Table 5.31). The internet was also commonly used as a transport information source, perhaps suggesting that visitors access public transport information in advance of their trip. The above findings are specific to Manchester, but a similar examination of information usage and usefulness in Glasgow would be very useful.

Table 5.31 Public transport information sources used by overseas visitors to Greater Manchester 2003

Information Source Used During Stay	Percentage of Respondents Having Used Information Source	Number of Respondents Having Used Information Source as a Percentage of Total Responses
tourist information centre	82.4	13.0
local people	75.7	12.0
attractions leaflets	73.3	11.6
internet	62.4	9.9
public transport information leaflets	62.4	9.9
public transport information centre	56.9	9.0
other tourists	54.5	8.6
reception at accommodation	52.2	8.3
'Manchester City Guide'	47.1	7.5
public transport information line	36.1	5.7
'Experience Manchester' booklet	28.6	4.5
Total responses (N=255)	631.4	100.0

Source: Thompson (2004) (Multiple response analysis)

5.81 73% of visitors to Manchester used tourist attraction leaflets for information on public transport. The public transport information provided by visitor attractions is often very basic and compiled by non-specialists without collaboration with transport operators. In an attempt to investigate further the travel advice available to visitors to Scotland via visitor attractions, content analysis of visitor attraction marketing information was undertaken.¹ The marketing leaflets and websites of Scotland's most frequented attractions, as identified by the 2005 Visitor Attraction Monitor, were examined along with information provided by a number of other attractions from across the country. Visitor attractions with both paid and free admission were selected.

5.82 For the purpose of the study references to travel by road, rail, bus, cycle, foot, boat and air were noted, as were mentions of car parking facilities and the presence of a location map. It was found that all of the attractions selected for study provided a degree of travel information to potential visitors although many inconsistencies in the level of detail made available were discovered. All attractions provided a description of their location, perhaps only brief in nature, or a map illustrating the position of the site. Many leaflets and websites contained both.

5.83 The majority of attractions contain information, to a greater or lesser extent, notifying visitors of the best way to access the attraction by road. It is noteworthy that many of marketing leaflets which lack information concerning road travel belong to central attractions in cities that may form a holiday base for visitors. Such attractions, including Edinburgh Castle, the Scottish Whisky Heritage Centre situated on the Royal Mile and the Museum of Transport in Glasgow, are often easily accessible, on foot or by public transport, from the city centre.

5.84 Public transport information is also seen to vary between attractions. While many provide details of the location of railway stations and bus stops and note the distance and service numbers of buses serving the attraction, others simply state that the attraction is accessible by train or bus and provide little further information. For example, travel information provided by Historic Scotland appears to be presented in a standard form across the organisation, hence visitors are simply advised to contact Traveline to enquire about public transport provision in the locality of the property they wish to visit. While this may be seen to inconvenience visitors, given the comprehensive information available through services such as Traveline and the changeable nature of public transport timetables it is perhaps surprising that less half of the attractions surveyed provided visitors with telephone numbers or internet addresses of local transport providers and organisations such as Traveline.

5.85 While in many instances visitors are advised to walk to attractions from central areas and nearby bus and train stations, there are few attractions that make reference to the use of bicycles as a method of transport. The principle exceptions appear to be properties managed by Historic Scotland and the National Trust for Scotland. Currently in the care of the National Trust for Scotland, Culzean Castle and Country Park in Ayrshire (the 7th most popular paid admission visitor attraction of 2005) informs potential visitors of the property's location on a National Cycle Network Route, while Historic Scotland advises visitors to contact Sustrans in order to find out about cycle routes in the vicinity of its properties.

¹ A list of attractions and the results of content analysis are provided in Annex 2

5.86 The Royal Yacht Britannia and New Lanark Village and Visitor Centre both advertise inclusive tickets covering transport to the attraction as well as admission. It is also interesting to note that the National Gallery of Scotland promotes a free bus which is provided by and runs between the National Galleries of Scotland.

Case Study 5.3 Prestwick Airport: access and information for the visitor

Glasgow Prestwick International Airport, situated within the South Ayrshire council district South West of Glasgow, currently offers flights to a wide range of holiday and scheduled destinations across Europe (GPIA 2006). The popularity of the airport among airlines and tour operators has increased substantially in recent years as the trend towards low cost air travel has continued.

In spite of its coastal location away from the principle cities of Glasgow and Edinburgh, various modes of transport are available to visitors wishing to take advantage of the services offered through Prestwick Airport and transport information is easily accessible online through the official website of the airport.

By road, from Edinburgh and Glasgow, the main approach to Glasgow Prestwick International Airport is the M77/A77 then onto the A79 (Airport Guides 2006). Within the airport complex there are two short stay car parks, containing collection and drop off points, within walking distance of the terminal building. A free shuttle bus is also provided to transport passengers between the three longer stay car parks and the airport terminal (GPIA 2006).

Taxis from Prestwick Airport are available at the taxi rank immediately in front of the terminal building and are provided by Air Black Taxis (Airport Guides 2006). However, at around 32 miles from Glasgow, 80 miles from Edinburgh and 103 miles from popular destinations like St Andrews, taxis from the airport may prove costly (Airport Guides 2006). Alternatively, car hire from a variety of service providers is available to visitors entering Scotland through Glasgow Prestwick International Airport (Airport Guides 2006).

At present, Glasgow Prestwick International is the only Scottish airport which is served by a dedicated railway station. Services operated by First ScotRail travel between Ayr and Glasgow Central station via Prestwick International Airport approximately once every thirty minutes Monday to Saturday and once an hour on a Sunday (GPIA 2006). The journey takes around 45 minutes depending on the number of stops made on route (SPT 2005). The first train from Glasgow departs at 06:00 and the last at 00:15. The first train from Ayr to Glasgow leaves Prestwick Airport at 05:48 while the final service of the evening departs at 23:08. (SPT 2005). The schedule for Sunday services is slightly different and contains a degree of seasonal variation. From Glasgow Central Station airline passengers can connect to services travelling around Scotland and the rest of the United Kingdom.

Rail timetables are available online or in the form of a booklet from SPT stations. However, it should be noted that the railway station at Glasgow Prestwick International Airport is not prominent on the relevant timetable. The front page of the West and Clyde Coast timetable highlights the Glasgow- Ardrossan- Largs- Ayr- Girvan- Stranraer route as well as the fact that ferry connections are illustrated within the timetable. For visitors who are unsure of the

location of the airport this may prove problematic, especially where railway staff are not available to aid passengers in their travel plans.

Discounted rail travel is available to all airline passengers travelling on routes to and from Glasgow Prestwick International. Production of a valid airline ticket entitles the holder to a 50% reduction in rail travel with First ScotRail. The offer is available on services to or from the airport on the day of travel unless connections extend the rail journey to more than one day. In this instance airline passengers can take advantage of discounted rail travel the day prior or following a flight (SPT 2006). Free rail travel between the airport and Glasgow is also available to all passengers flying a route new to the airport for the first six months of operation (SPT 2006).

Throughout the day the X77 Stagecoach Western service provides a limited stop route between Ayr, the airport terminal in Prestwick and Buchanan Street Bus Station in Glasgow's city centre (Airport Guide 2006). Monday to Friday the initial bus service departs Glasgow at 07:35 arriving at Prestwick Airport at 08:20. The final bus travelling from Glasgow leaves Buchanan Street at 23:30, while from Ayr the last service of the evening leaves the airport on route to Glasgow at 19:33 (Stagecoach 2005a). Similar hours of operation are in place on a Saturday and a limited service comprising four trips a day is available on a Sunday. Sunday services operate between 11:50 and 17:50 from Glasgow and 10:08 and 16:08 from the airport terminal building (Stagecoach 2005a). Stagecoach also offers a further, less direct, daily service between Glasgow and Ayr which may be of use to those wishing to travel by bus later in the evening. The final Stagecoach service of the evening departs the terminal building at 21:58 Monday to Friday, 22:03 on a Saturday and 21:43 on a Sunday (Stagecoach 2005b).

Transport information provided by Glasgow Prestwick International Airport draws attention to the fact that, at present, there is no public transport provision for passengers who arrive on late evening flights or who are required to check in before 07:30. The out-of-hours airport express service operated by Dodd's of Troon is therefore highlighted. The X99/X100 offer a daily service between Edinburgh, Glasgow and Prestwick International Airport. The evening service departs the terminal building at 23:59 reaching Glasgow at approximately 00:45 and terminating in Edinburgh at 01:40. The early morning express service leaves Edinburgh Waverley Bridge at 03:30 to arrive in Glasgow at 04:30 and Prestwick International around 05:30 (GPIA 2006). A standard single fare to or from Glasgow on this service is £7 while those travelling to or from Edinburgh can expect to pay £15. It is possible for passengers to book tickets for the airport express bus service online through the airport website and it is noted that discounted tariffs are available to those booking over the internet (GPIA 2006).

While the Dodd's Airport Express service is well advertised by Glasgow Prestwick International, those searching for public transport information using Traveline Scotland (www.travelinescotland.com) may experience difficulty finding details of the X100 route between Edinburgh and Glasgow. Further, while Traveline lists the X99 between Glasgow and Prestwick Airport it should be noted that the service is shown to depart from Killermont Street Bus Station as opposed to Buchanan Street Bus Station as is stated by the timetable provided online by the airport. It is probable that this anomaly could prove confusing for visitors unfamiliar with Glasgow City Centre.

Review of key barriers to public transport emerging from the data and reports

5.87 Very little data exists on barriers to public transport use, as surveys tend to ask simply what mode of transport people have used. Moreover, the studies undertaken by the transport operators ask only users of public transport and data is therefore missing on why visitors have elected not to use public transport. Nonetheless, conjectures on the key barriers to public transport use for visitors to Scotland can be made *inter alia* by appraising the data on visitor satisfaction with public transport use outlined in this chapter and from comments made in transport related reports that have been reviewed as part of this study.

- The Trossachs Trundler report (Lancashire Business School, 2004) provides some insight into tourists' decision to travel by private car, rather than public transport. When asked why they had chosen to travel to Loch Lomond and the Trossachs National Park in a private vehicle as opposed to using public transport, time and flexibility were the most prominent answers. Others stated that there were no buses of which they were aware (although this was often a misguided perception) that the car was their natural choice for a trip, that the party and belongings would be problematic to transport on a public service and that it would prove too expensive to use public transport (see Table 5.32). Findings also indicate that the majority of respondents would have postponed their trip, had the car not been available on that particular day, and that holiday makers would be more likely to use public transport than those on a day trip from home. However, the survey was carried out on a small scale and, as such, cannot be considered fully representative of those visiting the National Park area throughout the year.

Table 5.32 Why visitors to LLTNP would not use public transport (n=52)

Category	Description	No. of replies
Time	Either that public transport would take too long, or that it would not have the time and flexibility to visit other destinations	16
No buses	This was an assumption that such a rural area would not have buses or that there were no buses from their setting off point	13
Default car	Where the respondent indicates that car is their first natural choice for a trip out	10
Carrying capacity	This includes answers relating to people, animals or things that would be difficult to transport by public transport	9
Information	Respondents said they had no information about buses.	2
Other mode	The respondent indicated they would have walked rather than used public transport	1
Cost	Too expensive to use public transport	1

Source: Lancashire Business School (2004)

- Evidence has been found, as part of an ongoing research project into the seasonality of the accommodation industry with particular reference to SMEs within the Scottish Tourism Research Unit, to suggest that seasonality affects visitor travel behaviour.

Owners of homestay accommodation properties throughout Scotland reported that one of the key reasons why their business is only operational at certain times of year is that access to the property, other than by private car, is restricted due to the season nature of timetables. This effect is particularly acute in the off-peak season for areas which require access by ferry.

- Barriers to public transport use relating to transport supply are perceived by tourism operators as evidenced by the statement below from the anonymous owner of a Destination Management Company in Scotland, commenting on the suitability of Scotland's rail services for group travel:

"My own company is a Destination Management Company providing services in Scotland for overseas leisure tourists, mainly from the USA. Before the recent Rail Franchise was awarded, I sent in a submission re my concerns re the lack of suitable rail transport in Scotland for the overseas tourist, in particular for any groups wanting to travel round Scotland by rail. I know that similar concerns were expressed by VisitScotland.

We are possibly the only country in Europe where our commuter trains "double-up" as long distance trains and are completely unsuitable for this. With the exception of one GNER service per day to/from Inverness and two, I think, to Aberdeen, the normal FirstScotRail train is not suitable for tourists with large suitcases.

Several years ago, my main American client used to have a "Britain by Rail" tour. This tour, after it had arrived in Edinburgh, would go up to Inverness by train, spend a couple of nights there, then on to Kyle of Lochalsh for another two nights. We would then collect them by coach and take them down to Glasgow to connect with another train for England.

There is no way that I could, with the present trains, book a group of anything over 10/12 passengers comfortably (with all their large suitcases), on that kind of routing today. We would normally use first-class for our groups and there would not be enough seats available."

- Cycling as a mode of tourist transport has only briefly been touched on by this report. However, evidence exists to suggest that difficulties in transporting bicycles on public transport create restrictions. There is clear potential for train companies to bring cyclists and their bikes to Scotland from the rest of the UK and beyond, and ferry companies are important as a means of transporting visitors to the islands. While it is suggested that ferries are generally able to accommodate cyclists, trains and buses are seldom able to cope with demand during peak periods. Reservations are required on some key rail routes, on others they are not required but space is limited. In the case of bus travel, cycles are seldom catered for. However, it should be noted that First Scotrail does provide extensive information for cyclist on its website including integrated travel information regarding rail and the National Cycle Routes. Moreover, they also provide a very useful cycle rescue service under which they will transport the visitor (plus damaged bike) to the nearest suitable cycle repair shop, railway station, car rental agency or overnight accommodation.
- The State of the Park report (Loch Lomond and the Trossachs National Park Authority, 2005) identifies a number of issues which it perceives to present barriers to effective movement within the park by public transport. Low frequency of transport services is cited and this is clearly a problem in rural areas. The Trossachs Trundler represents a good practice example of how low density public transport, provided in

conjunction with cycling and walking, can appeal to both visitors and local residents. This is a model which could be replicated in other parts rural Scotland. The lack of integrated public transport information and marketing is also cited. The National Parks are already taking steps to integrate bus and rail information within their territory. Ideally this could also incorporate tourist information. Finally, cost is perceived to be a barrier to public transport use. For some of the key overseas markets in particular, the cost of public transport in Scotland, indeed in the UK as a whole, is comparatively high. Integrated ticketing may go some way to resolving this. For example, the Mackintosh Trail ticket in Glasgow represents value for money as it includes not only unlimited travel across the SPT network, but also access to several paying attractions on the Rennie Mackintosh theme. It should be reiterated, though, that the Freedom of Scotland Travelpass is regarded by visitors to Scotland as very good value for money.

- Although, for a variety of reasons, travel by public transport in rural areas may be perceived to pose the greatest challenge to the visitor, it should not be taken for granted that travel within Scotland's cities is problem free for the visitor. On 28th June 2006 the Glasgow Evening Times reported on the attempts of an overseas visitor to visit three of Glasgow's key tourist attractions in one day. Although some aspects of the transport system were reported to be efficient and easy to use, criticisms which emerged included the lack of an integrated ticketing system suitable for visitors, problems in accessing information and poor route coverage which resulted in journeys taking longer than necessary. A copy of the article is reproduced in Annex 3 of this report.

Chapter Summary

5.88 On average and across the studies reviewed there is no evidence to suggest that visitors from the UK and overseas, and those travelling for leisure purposes have lower levels of satisfaction than local transport users in Scotland. Indeed, the available evidence suggests that, although domestic visitors find it easiest to get around Scotland, they are the most likely to be dissatisfied with transport provision. There is also some evidence to suggest that leisure visitors are better satisfied with some public transport services than business travellers. Moreover, experiences of private transport appear in general to be more positive than those of public transport.

5.89 Some key themes emerge, however, which appear to affect visitor satisfaction and these can be related to the personal, system and environmental factors affecting modal choice, highlighted in Chapter 2. Factors relating to the transport system and its operations which appear to cause negative satisfaction include congestion and particularly signage for those travelling by car. For passengers of public transport, cost, information, ticketing and the helpfulness of staff have been shown to suffer lower levels of satisfaction among visitors. Environmental factors include the rural setting and remoteness of some attractions, whereas personal factors include size of group and the carrying of luggage. The lack of cycle provision is also a theme which emerges in various reports. Scotland has, in UK terms, a relatively comprehensive cycle network. However the inability of public transport services, in particular rail but also bus services in more rural destinations, to act as a back up for cycle tourists, is likely to either discourage cycling, or force more visitors to use a car to transport their bicycles.

5.90 There is some evidence, particularly from the Visitor Attractions Monitor, to suggest that visitor attractions in Scotland consider transport to have a small but significant effect on visitor numbers and satisfaction. This effect is perceived to more negative than positive. Indeed, the establishment of a Transport Study Group as part of the Scottish Tourism Forum is evidence of the fact that Scotland's tourism providers see transport as a key area for action in enhancing the quality of the visitor experience and increasing visitor numbers to attractions nationwide, and particularly in rural areas.

5.91 Ultimately, it should be stressed that there is a greater amount of data available on visitor use and perceptions of transport in Scotland than is immediately obvious. There are some inconsistencies in the way some of the data is collected, which create difficulties for collating and comparing the results. Nonetheless, the exercise of pulling together this data has been a useful one and there is a strong argument for greater coordination of this data and sharing of information in the future. A number of key barriers to public transport use by visitors have been identified, however these have largely been surmised in a piece-meal fashion from a number of reports which only deal with specific modes, as well as inferences from passenger and visitor satisfaction studies. There is certainly scope for extending this list. With greater resources and time, and cooperation from more of the attractions and transport providers, the picture could be improved. There is certainly scope for further study within this area. Such research should explore in greater detail the aspects of both public and private transport which are not performing to visitor expectations and identify more conclusively the key reasons why visitors elect to travel by private or hire. At present such evidence is largely anecdotal. Moreover, without further study, it is not possible to comment with any degree of certainty on the influence that the above mentioned barriers to public transport use have on the general travel behaviour of visitors to Scotland.

CHAPTER 6 CONCLUSIONS AND IMPLICATIONS

Conclusions

6.1 The principal aim of this study was to review and collate existing sources of information on the use of transport by those visiting Scotland for leisure, recreation and business purposes. Three main areas were covered:

1. Visitor flows within Scotland were examined in order to identify existing data on spatial travel trends, travel behaviour and visitor type and visitor use of travel modes.
2. The scope and limitations of transport supply for visitors were evaluated in an attempt to appraise the internal accessibility of destination Scotland for visitors. The role of information in accessibility was considered and judgements made on key barriers to travel within Scotland, as indicated by the available data.
3. Visitor experiences of transport provision in Scotland were considered, in order to identify levels of satisfaction with existing transport services, and any relationship between transport provision and satisfaction with Scotland's tourism product.

6.2 Table 6.1 summarises the main findings of this research in terms of what is currently known and what is not known about visitor travel behaviour in Scotland. Paragraphs 6.3 to 6.10 below elaborate on these points.

Table 6.1 Summary of current state of knowledge of visitor travel behaviour

What do we know	What do we not know
How many visitors	How visitors travel around Scotland (other than travel to airports)
How they arrive in Scotland	What are visitor impressions of different modes of transport and how do these compare?
What regions they visit (but not in what order)	Are there any socio-economic and national differences in terms of mobility and dispersal around Scotland?
How they arrive at some attractions	Can we identify certain market segments/typologies in terms of their transport use/propensity to use particular modes?
How satisfied visitors are with some types of transport in some areas	How important particular attributes of the transport service/system are to visitors
Destination satisfaction is affected by transport.	No real detail on how transport affects destination satisfaction.

6.3 It is clear that, whilst a great deal of reliable information is available from national surveys on the origins and basic socio-economic characteristics of domestic and overseas visitors, port of entry (in relation to overseas visitors), mode of travel to Scotland or the UK and visit purpose and length, little is known about the travel patterns of visitors within Scotland from these sources.

6.4 The majority of domestic visitors arrive in Scotland by car, although the proportion of those travelling by air and, to a lesser extent, by train, increases for those travelling from more remote origins in the UK. Air travel is the predominant mode of travel to the UK for overseas visitors. Less than one fifth of overseas visitors arrive in the UK using sea ports and the Channel Tunnel.

6.5 Although a large percentage of overseas visitors choose public transport to travel to the departure airport, it is not clear whether or not this is indicative of a more widespread use of public transport by overseas visitors during their stay in Scotland. It would be wrong, however, to assume that visitors use only one form of transport within Scotland. A significant proportion of car users also report using some other mode during their stay in Scotland. The recurring pattern that emerges from the available data is that the further away visitors come to Scotland from, the less likely they are to use a car. Visitors from North America are the possible exception to this, but there is insufficient data to substantiate this claim. The data reviewed indicates small, but nonetheless significant markets for public transport.

6.6 There is evidence of a change in the visitor market having occurred in recent years with a rise in the number of overseas visitors and the time they spend in Scotland, accompanied, possibly, by a reduction in the size of the domestic market. The impact this may have on the travel behaviour of visitors in Scotland is worthy of consideration. Most obviously, this may result in an increase in the number of overseas visitors who do not, by and large, arrive with their own means of transportation places more importance on the quality of transport service provision within Scotland.

6.7 Edinburgh and the Lothians is the most popular destination within Scotland followed by Greater Glasgow and the Clyde Valley and then the Highlands and Skye for both domestic and overseas visitors. Domestic and overseas visitors using Prestwick airport exhibit higher degrees of mobility and dispersal throughout Scotland than visitors using other airports. Further analysis of the origin, socio-economic characteristics and trip purpose of visitors may offer some explanation of this phenomenon.

6.8 Some gaps in the existing transport provision are apparent. As regards road transport, congestion in popular tourist areas, poor roads in some rural areas, a lack of parking facilities and poor signage have been identified as gaps in provision. From the perspective of public transport, it is evident that many of the visitor attractions which are located in more rural areas, in particular the areas of natural beauty, are accessed almost exclusively by private transport. An interesting phenomenon is suggested at some of these sites where the private coach appears to have replaced public transport as a means of access.

6.9 On average and across the studies reviewed there is no evidence to suggest that visitors from the UK and overseas, and those travelling for leisure purposes have lower levels of satisfaction than local transport users in Scotland. Indeed, the available evidence suggests that, although domestic visitors find it easiest to get around Scotland, they are the most likely to be dissatisfied with transport provision. There is also some evidence to suggest that leisure visitors are better satisfied with some public transport services than business travellers. Moreover, experiences of private transport appear in general to be more positive than those of public transport.

6.10 There is some evidence, particularly from the Visitor Attractions Monitor, to suggest that visitor attractions in Scotland regard transport to have a small but significant effect on visitor numbers and satisfaction. This effect is perceived to be more negative than positive.

Recommendations for Future Research

6.11 A number of weaknesses have been uncovered in the way in which data on visitor travel behaviour in Scotland is collected, analysed and ultimately stored. Throughout this report, shortcomings have been identified in the way in which particular surveys have collected and analysed information on visitor use and experience of transport in Scotland. It is possible to generalise to some degree and to suggest guidelines which may not only increase the usefulness of individual data sets, but also increase the possibilities for aggregating existing data sets.

6.12 Firstly, recommendations have been inserted throughout the report relating to simple additions to existing surveys which would permit a higher level of analysis of visitor use of transport. For example inclusion of variables measuring country of residence and purpose of trip (leisure or business) in surveys of passenger satisfaction undertaken by transport operators would allow visitor views to be examined separately. Likewise, it would be useful to measure whether respondents in the Tourism Attitudes Survey who are commenting on the quality of Scotland's transport network have used public or private transportation during their stay. Indeed, it would be desirable to introduce an element of harmonisation into the data collection process. For example, a number of visitor attractions undertake surveys of their visitors on a regular basis, as has been illustrated by this report. The inclusion of standard questions which request information on the point of origin of the journey to the attraction and the mode of transport used to access the attraction should be encouraged. In this, information can be gleaned not only on how visitors arrive at attractions, but also on distance travelled to access attractions. Moreover, results could be compared and collated across a range of key visitor attractions in Scotland and data mapped to show the spatial nature of tourist travel and the catchment areas for a range of attractions.

6.13 It would be very simple in many cases to raise the level of the data, in order to increase the possibilities for statistical analysis of the data. Where possible, ordinal, interval or scale level data should be collected, rather than nominal level data. Moreover, appropriate analysis should be undertaken in order to provide the fullest picture of the data. For example, where satisfaction with a list of destination attributes is measured on an attitudinal or Likert scale (e.g. accommodation, attractions, accessibility), rather than present the number of responses in each category in the scale, of which is difficult to gain an overview, it would be more useful to present the average ratings for each variable which can then be compared to see how the different attributes of the destination product are performing relative to one another. The same technique could also be used for surveys of satisfaction with attributes of public transport. Such techniques are relatively common and easy to implement.

6.14 It is important to build on previous surveys. For example, several of the visitor surveys reviewed asked similar questions with regard to the visitor's likes and dislikes about Scotland, often worded in different ways but essentially meaning the same thing. In many cases, these questions were open ended and allowed the researcher to build up a list of attributes of Scotland as a visitor destination which appeal to the visitor and which detract from the enjoyment of the destination. Whilst such explorative work is useful in building up

a longitudinal record of the likes and dislikes of visitors, it is considered more useful to build on this research by undertaking more in-depth analysis of these responses, which appear to remain largely the same from year to year. Moreover, it should be stressed that investigating the highlights and disappointments of the holiday confuses the concepts of expectations, importance and satisfaction. Where transport is cited as the main disappointment of a holiday, it cannot be clear whether this arose because transport was used and found to be of a much lower standard than other attributes of the destination product, or because transport was a factor of key importance for the visitor and, in under-performing even slightly, had a seriously detrimental effect on overall enjoyment of the destination. It is therefore important to measure as a minimum not only satisfaction with the various attributes, but also their relative importance across the sample. In this way, an importance/performance (IP) analysis could be undertaken in order to establish which elements of Scotland's tourism product are rated high in importance, but low satisfaction and are therefore under-performing. In this way, techniques from the academic literature can be usefully exploited to enhance the output of primary research. However, it should be noted that it would be necessary to employ quota sampling in order to ensure visitors are represented proportionately within any sample taken. It would also be necessary to obtain a large enough sample of visitors for any statistical techniques to be validly employed.

6.15 It is also recommended that greater attention be paid to the storage of data on transport use and that collected from visitor surveys. Much of the research currently undertaken in this field is commissioned by the public or private sectors and undertaken by research consultancies. Once the outcomes of the research have been delivered, the data set is seldom retained by the organisation which has commissioned the research. For this case of this particular research project, a number of data sets were requested from research consultancies for the purpose of undertaking secondary analysis on data collected. In such cases, it was clear from the report produced by the consultancies that the data set contained the variables necessary to undertake useful analysis which had not been previously undertaken. For none of the cases in point was the research consultancy willing to produce the data set. In one case, they produced analysis on request, but at additional cost. Where such research has originally been commissioned by the public sector, it is strongly recommended that the original research brief include a requirement that the data set be delivered as an outcome of the project. The UK Data Archive is worthy of consideration as an appropriate repository for data collected in visitor surveys.

6.16 Many points in the above discussion suggest that it would be desirable to have a degree of coordination over the collection and storage of data collected on transport and tourism in Scotland. It is also possible that such a recommendation may be equally relevant to other areas of the Scottish Executive's work. A successful example of such coordination can be found in the work of European Cities Tourism (ECT). This is a professional destination management organisation to which European urban destinations of over 100,000 inhabitants can affiliate. With the assistance of academic colleagues at the Economic University of Vienna, ECT has worked towards encouraging its members to standardise visitor surveys, particularly occupancy surveys taken in hotels, so that each city is measuring a key set of variables which can then be compared in order to give a more accurate picture of urban tourism and competition in Europe. Data is input via a online form and is collated and stored by the Economic University of Vienna. Clearly questions arise over whose responsibility such an exercise would become, particularly given the spanning of two areas of interest and departments (Transport and Tourism). One suggestion might be to involve Tourism Knowledge Scotland in this exercise. This is a body of academics working in

Tourism from all of the Scottish Universities and which therefore has a wealth of expertise in overseeing and implementing rigorous research projects.

Policy Directions

6.17 An overview of the existing policies of public agencies towards visitor travel covering, namely national government, enterprise companies and local authorities is shown in Table 6.2. This table summarises the main policies which have emerged from a review of available documentation. Where visitor travel and tourism are mentioned, it is generally in the context of economic development and is associated with major infrastructure and service development where the visitor benefits are a relatively small element. However other areas commonly being identified include providing travel information targeted at visitors, developing cycling routes, developing tickets for visitors, improving road signage. Overall, however, there are very few transport policy instruments that are targeted specifically at visitors. Whilst visitors undoubtedly benefit from the many general transport improvements being made, a bespoke approach for visitors may be required in certain aspects of transport provision.

6.18 Good policy requires a sound evidence base. This report has collected and collated the current state-of-knowledge on visitor travel behaviour in Scotland. It is clear that there are significant gaps in the evidence base and it would be sensible to address at least some of these gaps in order to produce better policy. Nonetheless, listed below are some specific recommendations aimed at improving transport provision for visitors. It must however be recognised that the information on which these are based is neither complete nor conclusive.

6.19 Transport strategy preparation and implementation is undertaken at national, regional and local levels in Scotland. There is a need to consider specifically the needs of visitors in the preparation of transport strategies, a point which is recognised in *Scottish Tourism: the next decade* (Scottish Executive, 2006).

6.20 The division of responsibilities for the planning and delivery of quality tourist transport between various stakeholders is imprecise. Transport management largely focuses its efforts on local users except where there is an unusually high level of tourist demand. Destination management organisations often regard transport as being outwith their remit. It is therefore recommended that there is a greater degree of co-ordination between stakeholders at different administrative levels.

6.21 Whilst it is recognised that visitors' use of public transport represents a small percentage of the total usage of public transport, there remains a significant demand for public transport, particularly by overseas visitors. In urban areas a sizeable proportion of overseas visitors are reliant on public transport. Thus, whilst this may not be an important market from the point of view of public transport operators, tourism represents an important part of the economy as a whole. It is important that mechanisms are found which incentivise operators to deliver public transport services which meet the needs of visitors to Scotland.

6.22 It may in certain instances be unrealistic to expect tourists to use existing transport supply which is designed to cater largely for the needs of the local population. Patterns of demand generated by the two groups are not always compatible. It may be more feasible in

some environments for transport authorities to work with operators to create tourist dedicated products.

Table 6.2 Tourist travel policies of public agencies with a transport responsibility

Agency	Policy	Policy Lever
Scottish Executive	Encourage more organisations to take the needs of tourists more seriously – Tourism is everyone’s business Include reference to transport in tourism strategy for Scotland and vice versa	Funding for VisitScotland, the Scottish Tourism Forum
		Considering tourist travel needs in investment decisions.
		Tourism strategy document. Forthcoming transport strategy document
Scottish Enterprise	Continued success and growth of Scotland’s tourism industry depends heavily on how accessible Scotland is to enable visitors to access and enjoy what Scotland has to offer and to provide an environment in which tourism businesses can successfully compete with other destinations.	Improving transport links by administering the air route development fund, and developing ferry and freight project
		Providing funding support for visitor facilities at key tourism destinations
Highlands and Islands Enterprise	Transport can help improve the quality and range of the tourism product and visitor experience and increase visitor dispersal	Raising awareness of the transport links needed for tourists, particularly amongst transport authorities.
Local authorities	Investment in infrastructure and services	Taking account of the needs of tourists in investment decisions.
	Identify and market car based tourist trails	Production of leaflets and distribution with visitor information
	Promotion of ticketing products	Specific tickets e.g. The Northern Explorer ticket
		Free entry to visitor attractions for non car visitors.
	Information	Improved signage
		Timetables at visitor attractions
	Improve transport links to visitor hubs such as London	Infrastructure and service prioritisation process

ANNEX 1

Table A1.2 Destinations visited in Scotland by departing domestic visitors from Scottish airports (2005)

Departure Airport	Total	Highlands & the Isle of Skye	The Outer Isles	Glasgow & Clyde Valley	Loch Lomond & the Trossachs	Argyll & the Isles	Aberdeen and Grampian	Perthshire, Angus, Dundee & Fife	South of Scotland	Edinburgh & Lothians	Other
Aberdeen	235,828	3,161	1,397	29,646	412	217	190,991	10,945	0	0	0
Edinburgh	1,779,393	214,688	8,863	80,412	62,837	6,101	45,117	273,576	46,821	1,139,702	34,503
Glasgow	1,253,886	50,390	232,608	761,840	79,391	77,781	10,528	30,203	88,502	22,148	13,138
Inverness	221,377	197,599	4,009	1,099	0	13,226	2,147	406	2,095	1,405	8,087
Prestwick	99,680	6,073	39,895	24,059	770	1,630	1,445	289	25,925	3,891	1,710
Total	3,590,163	471,911	286,772	897,056	143,411	98,953	250,229	315,419	163,343	1,167,145	57,438

Notes to table

Regional destination figures do not sum to total because a single visit to Scotland may encompass a visit to more than one region of Scotland

Source: VisitScotland (2006d); Base data: CAAS 2005

Table A1.2 Destinations visited in Scotland by departing overseas visitors from Scottish airports (2005)

Total	Highlands & the Isle of Skye	The Outer Isles	Glasgow & Clyde Valley	Loch Lomond & the Trossachs	Argyll & the Isles	Aberdeen and Grampian	Perthshire, Angus, Dundee & Fife	South of Scotland	Edinburgh & Lothians	Other
Aberdeen	284,367	9,090	4,890	38,403	4,273	228,229	6,888	1,003	2,867	9,672
Edinburgh	1,027,409	196,632	11,534	88,775	51,152	36,432	198,727	33,001	22,505	705,752
Glasgow	848,155	158,442	109,818	567,150	77,001	37,633	92,512	101,706	86,081	146,951
Inverness	48,603	44,794	472	1,680	441	770	40	254	5,468	2,000
Prestwick	761,334	145,840	106,257	377,840	201,347	19,975	10,748	230,537	38,646	341,059
Total	2,969,868	554,797	232,970	1,073,847	334,215	323,038	308,915	366,502	155,567	1,205,434
										33,873
										0
										11,282
										2,714
										104
										19,774
										33,873

Notes to table

Figures do not sum to total because a single visit to Scotland may encompass a visit to more than one region of Scotland

Source: VisitScotland (2006d); Base data: CAAS 2005

Table A1.3 Destinations visited in Scotland by departing overseas leisure visitors from Scottish airports (2005)

	Total	Highlands & the Isles the Isle of Skye	The Outer Hebrides	Glasgow & Clyde Valley	Loch Lomond & the Trossachs	Argyll & the Isles	Aberdeen and Grampian	Perthshire, Angus, Dundee & Fife	South Scotland	of Edinburgh & Lothians	Other
Edinburgh	744,411	168,266	11,430	66,497	39,006	29,189	149,378	29,750	19,377	518,119	8,365
Glasgow	651,414	149,439	83,836	427,074	71,017	34,321	84,389	84,141	83,691	136,577	2,714
Prestwick	715,298	143,900	86,039	362,605	199,585	19,975	10,748	223,754	38,646	336,173	19,774

Notes to table

Figures do not sum to total because a single visit to Scotland may encompass a visit to more than one region of Scotland

Aberdeen and Inverness airports excluded because of small sample sizes

Source: VisitScotland (2006d); Base data: CAAS 2005

ANNEX 2

Table A2.1 Content analysis of visitor attraction marketing information – top attractions paid admission

Attraction	Directions							Map	Comments
	Road	Rail	Bus	Cycle	Walk	Boat	Air		
Edinburgh Castle	-	-	-	Y	-	-	-	Y (R)	Visitors advised to call Traveline/Sustrans
Edinburgh Zoo *	Y	Y	Y	-	-	-	-	-	Detailed car directions. Bus service numbers and train stations mentioned
Stirling Castle	Y (off M9)	-	-	Y	-	-	-	Y (R)	Visitors advised to call Traveline/Sustrans
Royal Yacht Britannia *	Y	Y	Y	-	-	Y	Y	Y (multi-map)	Links and telephone numbers for transport operators given. SPT inclusive ticket.
Scottish Whisky Heritage Centre *	-	-	-	-	-	-	-	Y (S)	Located next to Edinburgh Castle at the top of the Royal Mile
Urquhart Castle *	Y	-	-	Y	-	-	-	Y (R)	Brief directions e.g. near Drumnadrochit on A82. Visitors directed to National Cycle Network
Culzean Castle & Country Park *	Y	Y	Y	Y (NC N7)	Y	-	-	Y (multi-map)	OS Reference given. Distances from train station/ bus stop given
Nevis Range									No information available
Cairngorm Mountain Railway	Y	Y	Y	Y	-	-	Y	Y (R)	‘Park info. What’s On’ Not specific to mountain railway. Public transport timetables to National Park included.
Blair Castle	Y	Y	-	-	-	-	-	-	Station 1000m from Castle. Telephone number for public transport enquiries given

The Real Mary King's Close *	Y	Y	Y	Y	Y	Y	-	-	-	-	Y (S)	Cycle rack/ taxi rank mentioned
Famous Grouse Experience *	Y	-	-	-	-	-	-	-	-	-	Y (R)	Download map/ directions. Call the attraction to get directions
Glamis Castle *	Y	Y	Y	-	-	-	-	-	-	-	Y (Multi -map)	
Waverley Excursions *	-	-	-	-	-	-	-	-	-	-	Y (Multi -map)	Online site for all bookings. Visitors directed to call Tourist Information Office for details
National Wallace Monument *	Y	-	-	-	-	-	-	-	-	-	Y (R)	Visitors directed to call Traveline for public transport information
National Gallery of Scotland *	Y	Y	Y	-	-	Y	-	-	-	Y	Y (S)	Free Galleries bus between national galleries.
Royal Museum & Museum of Scotland *	Y	Y	Y	-	-	Y	-	-	-	Y	Y (S)	Bus service numbers and on foot directions from city centre

Notes to table

- * Information obtained from website
- Y Information available
- Y(S) Street map
- Y(R) Trunk road map
- Y(Multimap) Hyperlink to Multimap
- NC National Cycle Route

Table A2.2 Content analysis of visitor attraction marketing information – top attractions free admission

Attraction	Directions							Map	Comments
	Road	Rail	Bus	Cycle	Walk	Boat	Air		
Royal Botanic Gardens, Edinburgh *	Y	Y	Y	-	-	-	-	Y (R)	Bus service numbers and tour bus mentioned
World Famous Old Blacksmiths Shop Centre *	Y	Y	-	-	Y	-	Y	Y (R)	www.visitor.gretnagreen.com
Falkirk Wheel	Y	Y	Y	-	-	-	-	-	Frequency of buses given. Detailed road directions. Telephone number for transport operators
St Giles Cathedral*	-	Y	Y	-	Y	-	-	-	Located on Royal Mile. Bus service numbers and foot directions given
Museum of Transport *	-	Y incl. subway	Y	Y	Y	-	-	Y (S)	Bus service numbers and name of nearest station given
New Lanark Village & Visitor Centre	Y	Y	Y	-	-	-	-	Y (R)	Mentions inclusive travel and attraction tickets
Glasgow Botanic Gardens									No information available
Gallery of Modern Art Glasgow									No information available
The Burrell Collection	Y	Y	Y	-	-	-	-	-	Very brief information e.g. Motorway exit, station name
Dundee Contemporary Arts *	-	Y	-	-	Y	-	-	Y (S)	Telephone number given for train information

David Welsh Winter Gardens												No information available
Burns National Heritage Park *	Y	Y	Y	-	-	-	Y	-	-	Y (R/S)	Y	Also a link to multi-map. Links to bus/train timetables
Eilean Donan Castle *	-	Y	Y	-	Y	Y	-	Y	-	Y (R)	Y (R)	Boat to and from Skye. Links to transport timetables
Centre for Contemporary Arts Glasgow												New website being set up.
The National Park Gateway Balloch; Loch Lomond Shores *	Y	Y	Y	-	Y	-	-	-	-	Y (R)	Y (R)	
Scottish Wool Centre Aberfoyle*	-	-	-	-	-	-	-	-	Y	-	-	“Off main street Aberfoyle”
Falls of Shin Visitor Centre, Sutherland *	Y	Y	Y	-	-	-	Y	Y	Y	Y (R)	Y (R)	
People’s Palace	-	Y incl. subway	Y	-	Y	-	-	Y	Y	-	-	Bus service numbers and approximate travel times given

Notes to table

- * Information obtained from website
- Y Information available
- Y(S) Street map
- Y(R) Trunk road map
- Y(Multimap) Hyperlink to Multimap
- NC National Cycle Route

Table A2.3 Content analysis of visitor attraction marketing information – other attractions

Attraction	Directions							Map	Comments
	Road	Rail	Bus	Cycle	Walk	Boat	Air		
Inverary Jail	-	-	-	-	-	-	-	Y (R)	
Clyde Built Maritime Museum	Y	-	Y	-	-	Y	-	Y (R/S)	Tel no. for transport operators given
Breadalbane Folklore Centre	Y	-	-	-	-	-	-	Y (R)	
Summerlee Heritage Park	-	-	-	-	-	-	-	Y (R)	
British Golf Museum	-	-	-	-	-	-	-	Y (R/S)	
Edinburgh Dungeon	-	Y	-	-	-	-	-	Y (S)	Map shows car parking and railway station
Blair Atholl Distillery Tour	-	-	-	-	-	-	-	Y (R)	
Perthshire Visitor Centre	Y	-	-	-	-	-	-	Y (R)	Brief information e.g. 7 miles north of Perth on A9
Inverary	-	-	-	-	-	-	-	Y (R/S)	Visitor Attractions in Inverary shown on map but not transport information
Callender House, Falkirk	Y	Y	Y	-	Y	-	-	Y (R)	Car, bus and train access mentioned but no details. Station shown on map
Museum of Flight	Y	Y	Y	-	-	-	-	Y (S)	Detailed road directions. Bus service numbers noted. Traveline number given
Bute	Y	Y	Y	-	-	Y	Y	Y (R)	Calmac and Scotrail numbers given links given
Millport, Isle of Cumbrae	Y	Y	-	-	-	Y	-	Y (R)	Calmac and Scotrail numbers given links given
Caithness Glass	Y	-	-	-	-	-	-	Y (R)	“Follow the brown tourist signs”

Edinburgh Crystal	Y	-	-	-	-	-	-	-	-	-	-	Y (R)	Brief directions from Edinburgh to Penicuik
The Scottish Parliament	-	-	Y	-	Y	-	-	-	Y	Y (S)	Y (S)	Y (S)	Visitors directed to use public transport. Advised to call Traveline for public transport information
Tartan Weaving Mill & Exhibition	-	-	-	-	-	-	-	-	Y	Y (S)	Y (S)	Y (S)	Attraction in City Centre
Scottish Football Museum	-	Y	Y	-	Y	-	-	-	Y	Y (R/S)	Y	Y	Bus service numbers and telephone numbers of transport operators given
Strathclyde Country Park	-	-	-	-	-	-	-	-	-	Y (R)	Y (R)	Y (R)	
Drumpellier Country Park	Y	Y	Y	-	-	-	-	-	-	Y (R)	Y (R)	Y (R)	
Motherwell Heritage Centre	Y	Y	Y	-	Y	-	-	-	Y	-	-	-	No map but detailed direction by car or on foot from station
Vikingar	-	-	-	-	-	-	-	-	-	Y (R/S)	Y	Y	
Cathedral House Hotel	Y	Y	-	-	Y	-	-	-	Y	Y (S)	Y	Y (S)	

Notes to table

- * Information obtained from website
- Y Information available
- Y(S) Street map
- Y(R) Trunk road map
- Y(Multimap) Hyperlink to Multimap
- NC National Cycle Route

Figure A3.1 Hard Road to the Sights
Source: Evening Times Wednesday, 28th June 2006. Reproduced with the kind permission of Newsquest (Herald and Times) Ltd.



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