



North Pembrokeshire Transport Forum

Fforwm Trafnidiaeth Gogledd Penfro

National Assembly for Wales

Rural Development Sub-Committee

Inquiry into Rural Tourism in Wales, September 2010

The North Pembrokeshire Transport Forum welcomes the Rural Development Sub-Committee's decision to carry out an inquiry into rural tourism in Wales and welcomes the opportunity to contribute to the inquiry. Set up in 2000, the Forum works for the provision of effective, integrated transport to, within and from the North Pembrokeshire area; as well as promoting the benefits (and encouraging greater use) of public transport. From its beginning the Forum recognised the crucial role that tourism plays in the area's economy and the strong links between transport and tourism.

The Forum notes that the aim of the inquiry is twofold: (1) to assess the effectiveness and impact of the various Welsh Government strategies to rural tourism and (2) to make recommendations to the Welsh Government and any other appropriate bodies. Although our contribution will deal exclusively with 'rural tourism-related transport services' to/from and within the North Pembrokeshire area, we believe that much of what we have to say will be relevant to similar rural areas.

INTRODUCTION

Transport and Tourism - Overall View

1. 'Tourists and local people need to have access to the wide variety of cultural, built and natural visitor attractions in Wales – and efficient, safe and reliable transport networks and services support the industry. Encouraging as many visitors as possible to use public transport, walking and cycling also contribute to the sustainability of the tourism sector'. (Outcome 10. National Transport Strategy, 2008).
2. 'We are keen to ensure that visitors to Wales have the opportunity to experience Wales' coast and countryside and associated visitor attractions by sustainable means. Reducing visitors' dependency on the car will help reduce noise, air pollution and CO2 emissions related to tourism as well as reducing congestion and disruption to local people...Tourists also provide an important source of patronage for local transport services, especially in the more sparsely populated rural areas, helping to ensure their viability'. (Ministerial Statement. Sustainable Transport and Tourism Assessment, 2009).

Transport and Tourism - North Pembrokeshire

1. 'Apart from the larger semi-rural centres of Fishguard, Goodwick, St David's and Crymch, North Pembrokeshire consists of numerous small, isolated rural communities. The area is a high quality tourist destination; with a growing non seasonal "green tourism" market sector that enjoys outdoor adventure activities and the "natural environment"'.

'Though improvements have been made, public transport services in North Pembrokeshire do not entirely meet the needs of the travelling public. This results in an over dependence on the car as a means of transport - for those who live in the area, as well as for those who come to the area on business or on holiday. The area's peripheral location is further heightened by its poor rail service'. (North Pembrokeshire Transport Forum Presentation to the Welsh Assembly South West Regional Committee, Port Talbot, 28th November 2003, updated 2007).

2. 'North Pembrokeshire (including St Davids, Fishguard, Newport and the Pembrokeshire Coast National Park) is identified with 'Coastal Tourism Potential', and the towns with 'Tourism Focus'. Fishguard-Goodwick is identified as a 'Key Settlement Hub' and a 'Key Regeneration Area' - with 'National and Regional Connectivity'. Fishguard and Goodwick are important drivers of the north Pembrokeshire economy. The area needs to be regenerated to respond to economic change'.

'Key strategic priorities for the area include overcoming the area's peripherality by improving strategic transport links... Improvements to the rail links are an important part of this, particularly improving

the service frequency... Key priorities for public and community transport in the area include more and better public transport options to reduce reliance on the private car, including safe cycling and walking routes. Health-care, education and leisure services need to be easily accessible by public and community transport from the local service and tourism centres and smaller settlements'. (Spatial Plan Update. Pembrokeshire - The Haven, 2008).

CONSULTATION RESPONSE

The North Pembrokeshire Transport Forum submits the following responses to the consultation questions:

1. Is support for 'rural tourism-related transport' services being effectively co-ordinated by the Welsh Government?

Welsh Government support for 'rural tourism-related transport' to/from and within North Pembrokeshire is not very effectively co-ordinated as it is extremely fragmented.

A large number of plans, policies and strategies contain references to and/or recommendations to do with rural tourism and/or transport:

- Welsh Assembly Government & Pembrokeshire County Council. Fishguard & North Pembrokeshire Regeneration Plan (2003)
- South West Wales Regional Tourism Strategy. 'Open All Year' (2004)
- Achieving Our Potential 2006-2013 - Tourism Strategy for Wales Mid-Term Review (2006)
- Wales Rail Planning Assessment (2007)
- National Transport Strategy (2008)
- Spatial Plan Update. Pembrokeshire - The Haven (2008)
- Coastal Tourism Strategy (2008)
- Walking and Cycling Action Plan for Wales 2009-2013 (2008)
- Cultural Tourism Action Plan 2008-2011
- National Transport Plan (2009)
- Sustainable Transport and Tourism Assessment (2009)

Welsh Government support is delivered through a variety of channels. While rail services are subsidised by the Welsh Assembly Government, Welsh Government support for the other transport modes is channelled through a variety of local government departments/sections.

This fragmentation of support has hampered the development, provision and operation of an effective integrated, sustainable and environmentally friendly transport system to/from and within North Pembrokeshire for tourists and/or residents.

2. How could the Welsh Government improve the way it delivers support for rural tourism-related transport services?

- By developing an integrated policy linking the provision of fully integrated transport services with the rural tourism 'industry'.
- By developing a more unified system of oversight/delivery of policy objectives and strategies relating to transport and tourism.

3. What progress has been made on the actions contained within the various Welsh Government strategies relevant to rural tourism-related transport services?

While significant improvements have been made with regard to the provision and integration of bus, community transport, cycling and walking services/facilities in North Pembrokeshire, transport services are not fully integrated as there has been no improvement to the extremely limited Fishguard rail service (only 1 mid-day and 1 mid-night train). The result is that most tourists travel to and from North Pembrokeshire by car.

4. Have these strategies been sufficiently updated in light of a number of organisational and policy changes over recent years?

- No. See answer to question number 2.

5. Have the organisational changes of recent years assisted in delivering the objectives of the various strategies?

- No. See answer to question number 2.

6. What contribution has the Cultural Tourism Strategy made to developing rural tourism-related transport?

- None. There are no references to transport in the strategy.

7. What is your opinion of the proposal contained within the Farming, Food and Countryside strategy for a reinvigoration of the Adfwyio type of approach to rural tourism?

- Not relevant to our experience.

CONCLUSION

A number of government plans, strategies and assessments refer, to a greater or lesser degree, to the link between transport and tourism in general. The Spatial Plan, the South West Wales Regional Tourism Strategy, and the Coastal Tourism Strategy draw attention to the crucial role that transport plays with regard to tourism in south west Wales and, in particular (in the Spatial Plan), in North Pembrokeshire.

Top level support for tourism related transport services is made (in the Sustainable Transport and Tourism Assessment) by Ieuan Wyn Jones AM, Deputy First Minister and Minister for the Economy and Transport and Alun Ffred Jones AM, Minister for Heritage. The Ministers note that they are keen to ensure that visitors to Wales have the opportunity to experience Wales' coast and countryside and associated visitor attractions by sustainable means, reducing visitors' dependency on the car. They also point out that tourists provide an important source of patronage for local transport services, especially in the more sparsely populated rural areas, helping to ensure their viability.

Welsh Government support for transport is delivered through a variety of channels. While rail services are subsidised by the Welsh Assembly Government, Welsh Government support for the other transport modes is channelled through a variety of local government departments/sections. This fragmentation in the provision of support has hindered the development, provision and operation of an effective integrated, sustainable and environmentally friendly transport system to/from and within North Pembrokeshire for tourists and/or residents.

While significant improvements have been made with regard to the provision and integration of bus, community transport, cycling and walking services/facilities in North Pembrokeshire, transport services are not fully integrated as there has been no improvement to the extremely limited Fishguard rail service (only 1 mid-day and 1 mid-night train). The result is that most tourists travel to and from North Pembrokeshire by car.

Welsh Assembly Government funding for additional trains to Fishguard (a top rail priority proposal in the SWWITCH Regional Transport Plan) would enable service providers to put the missing piece of the North Pembrokeshire 'tourism-transport jigsaw' in place.

The Forum notes that the aim of this inquiry is twofold: (1) to assess the effectiveness and impact of the various Welsh Government strategies to rural tourism and (2) to make recommendations to the Welsh Government and any other appropriate bodies.

1. The North Pembrokeshire Transport Forum believes that the effectiveness and impact of the large number and variety of Welsh Government strategies to 'rural tourism-related transport services' is negatively affected by the lack of a unified consideration of the matter and by the fragmented systems of implementation/delivery of Welsh Government support.

See also:

ANNEX I. An examination of Welsh Government strategies relevant to rural tourism and transport, along with North Pembrokeshire Transport Forum comments.

ANNEX II. A North Pembrokeshire tourism provider's responses to the inquiry questions.

2. The Forum suggests that the Rural Development Sub-Committee makes recommendations that the Welsh Government and any other appropriate bodies should:

- Develop an integrated policy linking the provision of fully integrated transport services with the rural tourism 'industry'.
- Develop a more unified system of oversight/delivery of policy objectives and strategies relating to transport and tourism.

ANNEX I

Welsh Government Strategies Relevant to Rural Tourism and Transport and North Pembrokeshire Transport Forum Comments

Relevant references to and/or recommendations to do with rural tourism and/or transport in the following plans, policies and strategies are noted, followed by bullet pointed comments by the North Pembrokeshire Transport Forum.

Welsh Assembly Government & Pembrokeshire County Council. Fishguard & North Pembrokeshire Regeneration Plan, 2003.

One of the Plan's key objectives was to build on the area's key strength as an important tourist destination, providing facilities that will enable the area to capture a greater proportion of the local tourism market and attract new long-stay and short-stay visitors.

SWOT analysis threats included 'Lack of investment in rail services', and Communications Outputs included 'Enhanced road and rail communications would strengthen the southern economic corridor as part of Trans-European networks'.

- No recommendations for transport improvements were made.

South West Wales Regional Tourism Strategy 'Open All Year', 2004.

West of Swansea there is a lack of integrated public transport with infrequent rail services and poor quality infrastructure. Local bus services offer more flexibility but services remain less than ideal, particularly along the coast. The proportion of visitors coming without a car is low...efforts should be made to ensure that public transport provision, timetabling and especially promotion are improved in order to present the visitor with practicable alternative options. Use of public transport should partly be seen as a providing enhanced visitor experiences as well as assisting visitor management. Initiatives such as the minibus services for walkers in the Pembrokeshire Coast National Park should be supported.

- No improvement was made to the limited frequency of Fishguard rail services.
- There were considerable improvements to the coastal and inland minibus services.

Achieving Our Potential 2006-2013 - Tourism Strategy for Wales Mid-Term Review, 2006.

Poor transport networks and gateway links often hinder access to some parts of Wales...Over reliance on the car will continue to place a burden on main gateways to Wales and popular destination areas, as well as having a damaging impact on the environment and communities in these areas. An efficient public transport system which meets visitor needs is essential before a significant reduction in visitors travelling to and within Wales by car is possible.

- The extremely limited frequency of Fishguard rail services remained unchanged.
- The provision of coastal and inland minibus services continued to expand.

Wales Rail Planning Assessment, 2007.

Frequency and quality enhancements on the Heart of Wales Line to improve accessibility and promote social inclusion and tourism include: (a) Improve frequency from four to five trains per day, (b) Align service to key market needs (for example increase capacity at peak holiday periods), and (c) Promote services experiencing low patronage and linkage to destination/marketing.

- The Assessment does not include proposals to increase the frequency of rail services to Fishguard.

National Transport Strategy, 2008.

Encourage as many visitors as possible to use public transport. Walking and cycling also contributes to the sustainability of the tourism sector. Visitor attractions, such as open spaces, footpaths and cycleways also provide core infrastructure for encouraging healthier lifestyles. We aim to improve access to such links. Connections with the rest of the UK and internationally are vital for business and tourism. Reliability of rail services requires more connections to give a greater choice of service.

- The Strategy does not include recommendations or proposals for improved rail services to Fishguard.

- Significant improvements have been made in the provision of new footpaths and cycleways in North Pembrokeshire.

Spatial Plan Update. Pembrokeshire - The Haven, 2008.

Key strategic priorities for the area include overcoming the area's peripherality by improving strategic transport links. Improvements to the strategic transport links and infrastructure have the potential to deliver safer and more reliable journey times on current networks, and a TEN-T east-west corridor of international importance, which is essential to the regeneration of the Area's economy and employment base and in overcoming its peripheral location. Improvements to the rail links are an important part of this, particularly improving the service frequency and journey times to and from the Area's ports, strategic employment sites and strategic hubs.

Key priorities for public and community transport in the area include more and better public transport options to reduce reliance on the private car, including safe cycling and walking routes. Health-care, education and leisure services need to be easily accessible by public and community transport from the local service and tourism centres and smaller settlements.

SWWITCH is developing a regional transport plan (RTP) for South West Wales as a whole and must ensure this aligns with, informs, and is informed by, regional priorities and strategies.

- The SWWITCH Regional Transport Plan includes a top priority proposal for the addition of 5 trains per day between Fishguard and Carmarthen, to connect with the mainline Milford Haven service.
- The National Assembly's Enterprise and Learning Committee recommended that the Welsh Assembly Government should provide funding for the additional train services to Fishguard.
- A wide variety of community transport services now operate in the North Pembrokeshire area; the coastal inland minibuses are used by both residents and visitors.
- Low floor buses provide wheel chair accessible services on all the mainline routes in the area; these buses connect with all of the coastal and inland minibuses.
- There have been significant improvements in the provision of cycle and walking routes throughout the area.

Coastal Tourism Strategy, 2008.

Rising car ownership and use is likely to be reflected in growing road congestion both in destination and origin areas, which could inhibit any growth in tourism day trips in particular. The volume of traffic on roads in the UK has increased by 22% over the past decade according to the Department for Transport.

Public transport access by rail to the coast is also relatively good with regular services along the North Wales and South Wales coast. However, services become less frequent further west and throughout Mid Wales. Many coastal locations are accessed by narrow country lanes which can suffer from congestion during the summer and cause safety issues for walkers and cyclists...the challenge is to develop innovative forms of public transport, to move people around local 'hot spots', and to make it easier for visitors to walk and cycle around destinations...In considering forms of public transport, consideration needs to be given to the specific needs of people undertaking outdoor activities both in terms of the equipment that will need to be transported and in relation to the frequency and times of transport.

The Welsh Assembly Government has recently published a Wales Transport Strategy *Connecting Wales*. The Transport Strategy will have a key role in improving accessibility to and within Wales and in helping to achieve a more sustainable tourism industry. The tourism sector will need to work closely with the four Regional Transport Consortia to ensure that tourism related solutions and innovative ideas are properly identified and prioritised. It will be important to consider the role of public transport and non vehicle modes in reducing the reliance on the private car.

Day visitors can cause congestion and pressure on parking facilities, particularly during the peak holiday season. Pressure can be eased by promoting alternative methods of travel such as cycle routes and public transport, or by establishing seasonal park and ride systems.

- The SWWITCH Regional Transport Plan contains a proposal for additional train services to Fishguard.
- The coastal shuttle minibus services help to reduce congestion on narrow lanes throughout North Pembrokeshire.
- The number of cycle tracks in the area continues to grow.
- Current Arriva Trains Wales rolling stock is unable to take more than 2 cycles per train.
- Mainline buses, as well as the coastal and hill walkers minibuses, are unable to carry cycles.

- A seasonal park and ride service operates in St Davids.

Walking and Cycling Action Plan for Wales 2009-2013, 2008.

The objective is to encourage more people to walk and cycle more safely and more often. The aim is to maximise the contribution that walking and cycling can make to increasing tourism, in particular to (a) Update walking and cycling strategies; (b) Utilize EU Convergence Funding to improve the quality of the cycling and walking tourism product; (c) Maintain and develop Wales's competitive advantage as a world class mountain biking destination; (d) Ensure that promotion of the National Cycle Network links to cycle friendly accommodation providers.

- Walking and cycling are actively promoted by Pembrokeshire County Council and by local tourism providers.
- Pembrokeshire County Council has an ongoing programme for the creation of new walking, cycling and shared use tracks.

Cultural Tourism Action Plan 2008-2011.

- There are no references to transport in the Plan.

National Transport Plan, 2009.

The Plan builds on previous plans, adding and integrating public and community transport, walking and cycling. The Plan sits alongside the Regional Transport Plans in delivering the Wales Transport Strategy. The Plan sets out solutions to transport issues along the main movement corridors in Wales: East-West in north Wales; East-West in mid-Wales; East-West in South Wales; and North South.

- There is only one brief reference to tourism in the Plan: linking transport and tourism in the opening paragraph in Chapter 5 - The East-West Corridor in North Wales.
- There are no transport proposals for North Pembrokeshire in Chapter 4 - the East-West Corridor in South Wales.
- The only proposals for the area west of Swansea are: (a) To re-double the railway line between Gowerton and Loughor; and (b) A programme of road works on the A40 at The Kell, on the A477 from St Clears to Red Roses, and on the A40 from Llanddewi Velfry to Penblewin.

Sustainable Transport and Tourism Assessment, 2009.

The report aims to detail how existing (*our emphasis*) public transport services could be made more attractive to the tourism user and how the public transport and tourism sectors could work in partnership to achieve this. The task and finish group that drew up the report was advised that recommendations should be accommodated within existing Government Spending Plans and National programmes (e.g. the Wales Transport Strategy, the National Transport Plan and the Rail Forward Programme) (*our emphasis*).

The points identified as some of the barriers that prevent visitors from using public transport included: (a) Connectivity with attractions (not all attractions are accessible by public transport/rail); (b) Difficulty in moving around the destination via sustainable transport; (c) Little incentive for the tourism trade to encourage visitors to use sustainable transport; (d) A need for a culture change in the way that tourist/visitor destinations think about sustainable transport; (e) A long held and deep rooted belief that the car is the only means of transport to get to the destination – a cultural issue common throughout society; (f) A lack of knowledge about the sustainable transport options available; and (g) A belief that promoting sustainable transport options before the car might in some way have adverse commercial implications for that destination.

The group examined examples of current best practice and sought to explore opportunities for extending or building upon these. Current opportunities included: (a) An extensive public transport network exists in Wales – some of which benefits from Welsh Assembly Government support; (b) The focus should be on making best use of the existing network and services and to focus on areas where there is spare capacity in the system, i.e. non peak time travel; and (c) The need to capitalise on current and planned investment in public transport.

In the short term, the focus will be on getting visitors to move around their destination by sustainable forms of transport (bus, cycling, rail, foot). A key objective: Encourage more local services linked to visitor attractions.

Longer term objectives will be to increase the number of visitors using transport for the main part of their journey (i.e. to get to Wales) through: (a) Improving access into Wales – continued investment in public transport infrastructure and services; (b) Improving the integration of services and

information to facilitate multi modal travel. This is likely to be the area where most gain can be made in terms of reducing the environmental impact of visitors to Wales.

- Considering the fact that transport improvements are recommended in so many of the Welsh Government plans, policies and strategies referred to above, it is disappointing that this important report only aims to detail how existing public transport services could be made more attractive to the tourism user.
- While recognising that poor connectivity with attractions (not all attractions are accessible by public transport/rail) is one of the barriers to using public transport, no support is given for improvements set out in national programmes such as the Wales Transport Strategy, the National Transport Plan and the Rail Forward Plan.
- The only recommendation to improve public transport services is the longer term objective to increase the number of visitors using transport for the main part of their journey (i.e. to get to Wales).

ANNEX 11

A North Pembrokeshire Transport Provider's Responses to the Inquiry Questions

Sophie Hurst, the Proprietor and Manager of Preseli Venture, was invited to respond to the inquiry questions.

Preseli Venture, one of the North Pembrokeshire Transport Forum's Corporate Members, is a year-round outdoor adventure provider with lodge accommodation. This tourism business attracts a wide range of clients: adults, families, schools, colleges and groups. Clients are drawn from all parts of the United Kingdom, and Sophie Hurst estimates that approximately 25% come by train.

Responses to the Inquiry Questions

1. Is support for rural tourism is being effectively co-ordinated by the Welsh Government?
 - *No - not really noticed much support*
2. How could the Welsh Government improve the way it delivers support for rural tourism?
 - *Be more accessible. Find out what support rural tourist businesses actually want.*
 - *We at Preseli Venture want improved train services to north Pembrokeshire and Fishguard with improved integrated transport to/from certain trains so our clients can get to/from the train station more easily.*
 - *We also want the resumption of a usable "weekend break" National Express coach service to/from Haverfordwest which has been withdrawn in 2010.*
3. What progress has been made on the actions contained within the various Welsh Government strategies relevant to rural tourism?
 - *Not sure of what is contained in strategies.....*
4. Have these strategies been sufficiently updated in light of a number of organisational and policy changes over recent years?
 - *Not sure.....*
5. Have the organisational changes of recent years assisted in delivering the objectives of the various strategies?
 - *Not sure*
6. What contribution has the Cultural Tourism Strategy made to developing rural tourism?
 - *?*
7. What is your opinion of the proposal contained within the Farming, Food and Countryside strategy for a reinvigoration of the Adfwyio type of approach to rural tourism?
 - *Not relevant to our experience.*