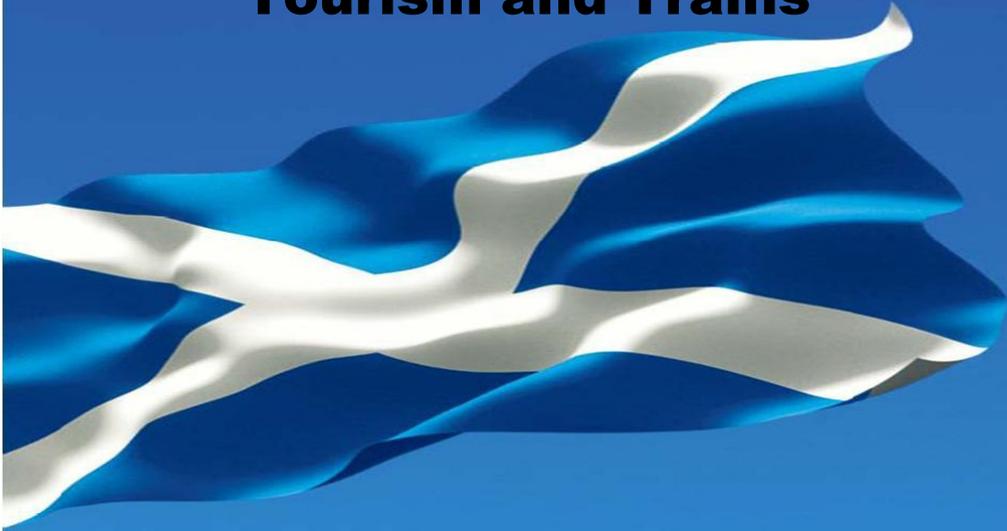


Tourism and Trains



An opportunity for Scotland

Notes from the meeting held on December 6th 2010 hosted by the Loch Lomond and Trossachs National Park at their HQ in Balloch, sponsored by the Scottish Association for Public Transport and the Friends of the West Highland Lines.

Section A – Tourism and Trains - SAPT

- 1 Tourism and Railways Now**
- 2 International Tourism and Trains: Swiss Case Study**
- 3 Scotland's Competitive Position: the West Highland Lines**
 - Train Service and Quality**
 - International Marketing and Event Opportunities**
- 4 Future Development**
 - Combined Rail, Cruise and Coach Tours**
 - Rail service upgrade**
 - ScotRail refranchising in 2014**
 - Multi-agency and community involvement**
- 5 Other Rural Lines to Stranraer, Kyle and the Far North**

Section B – The Tree Problem – Friends of the West Highland Lines

Section C – Summer 2011 Oban Service Plans - ScotRail

*Issued by the Scottish Association for Public Transport
in association with the Friends of the West Highland Lines*

January 2011



Scottish Association for Public Transport

Section A – Tourism and Trains

1 Tourism and Railways Now

Tourism last year was worth £4.1 billion, 5% of the Scottish economy. Over 200,000 people are employed in the tourist industry, around 13% of all employment.

Scotland offers a wide variety of attractions:

- Castles – Historic Scotland, National Trust, and privately owned
- Museums and art galleries
- Shopping
- Events eg Edinburgh Festival
- Scottish Heritage – Trace the Ancestors
- Wildlife
- Outdoor Activities eg golf, walking, fishing, skiing
- Scenery
- **World Class Scenic Railways, eg the West Highland Line**

The VisitScotland website shows that outdoor activities are by far the greatest attraction:

<u>Activity</u>	<u>Visitors Participating (2010)</u>
Hiking/hillwalking/rambling	36%
Heritage, architecture, literature etc	17%
Shopping	10%
Touring/sightseeing	9%
Watching performing arts	6%
Wildlife watching and zoos	4%
Golf	3%
Fishing	3%
Adventure Sports	3%
Sailing/boating	3%

“Public Transport is increasing as the preferred mode of travel with visits by trains and scheduled buses up. although air travel. as demonstrated by BAA figures is down. Travel by car

Scotland’s rural railways are invaluable assets in promoting the growing enthusiasm for green tourism. Development of these lines as world-class tourist attractions could:

- Open up new tourist markets
- Increase rail revenue
- Reduce summer road congestion
- Cut pollution from transport
- Boost the economy of rural areas
- Compete with other countries

Giving rural railway services a higher profile would improve lifeline public transport in remote areas as well as creating a valuable opportunity for Scottish tourism marketing.

As petrol prices increase, rail will be ever more important in growing tourism in Scotland.

Source: VisitScotland.org



“Home from the Hill”: Campers and cyclists board the Mallaig-Glasgow West Highland train at Spean Bridge.

Special trains like the “**Jacobite**” (right) are major tourist attractions. Fully booked through the main summer season, the train brings around 40,000 tourists every year to Mallaig (lower right), boosting the Lochaber economy.

The season has now been extended to the end of October, with visitors attracted by the “Harry Potter” effect backed by good marketing.

The West Highland Line is also the highlight of other special train itineraries including “The Royal Scotsman”.

Passenger numbers on ScotRail service trains on the West Highland Lines are showing healthy growth. Travellers to Oban increasing by 17% between 2008 and 2009, as shown in the table below showing usage of Scotland’s four rural rail routes, compiled from data supplied by the Office of Rail Regulation.



The “Jacobite” (above) brings over 40,000 visitors to Mallaig (below) every summer.



	Trains per Day	Entrance/exits per Year (thousand)	Change 2008 to 2009
Oban	3	127	+17%
Fort William*	4	122 (+ ~ 80 on Jacobite)	+2%
Mallaig	4	65 (+ ~ 80 on Jacobite)	+3%
Thurso+Wick	4	65	+14%
Kyle of Lochalsh	4	53	+10%
Stranraer	7	50	-2%

*Fort William figure includes traffic to Mallaig & Glasgow, but not through Mallaig-Glasgow traffic

Growth and marketing are constrained by train capacity and schedule frequency, with only three trains per day to Oban. But ScotRail trains on the West Highland pass through world-class scenery and take tourists to historic locations like Glenfinnan (below).

The West Highland Lines can deliver a lot more!



2 International Tourism and Trains: Swiss Case Study

Many countries are developing rural railways as major international tourist attractions including:

- Switzerland Glacier Express, William Tell Express, Jungfrau Railway
- Canada Rocky Mountaineer
- Norway Flam-Myrdal Line
- Austria Zillertalbahn

The Swiss Railways annual Report 2009 gives an insight into the Swiss approach to tourism:

“Switzerland is a major travel and tourism destination, and SBB is an important link in its value-added chain. Transport contributes 20% of tourist added value”.

“Easy accessibility is the key factor, a central requirement for tourism”

“Good public transport links make a major contribution to development of tourism in the regions”.

“Public transport is extremely important to leisure as a whole: leisure is now the most important reason for travelling. The travel split by passenger-kilometres (all modes including car) is:

58% leisure

35% commuting

7% business

Features of the Swiss integrated public transport system are:

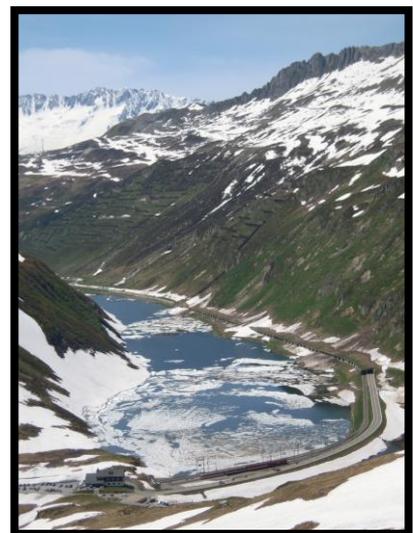
- Strategic “Taktfahrplan” timetable
- Nationwide regular interval timetables
- Hierarchy of express, regional & local trains and buses
- Regular connections at regional and local hubs
- Swiss people and tourists can reach all towns & villages
- Accessibility is key to economic & tourism development



Above: The “William Tell Express” passes Fluelen on Lake Lucerne.

The “Glacier Express” has been developed as a major tourist attraction by providing:

- * Better trains with observation cars
- * Quality service including catering
- * Good marketing in Swiss tourist offices and hotels
- * Worldwide marketing as part of holiday packages
- * Integration with local bus services



The “Glacier Express” links Zermatt to St.Moritz via the Oberalp pass(above)

“Glacier Express” tourism has grown rapidly

Year	Passengers (k)	
1982	20	
1983	53	
1984	80	
2005	250	<i>12-fold increase in 23 years!</i>

Local economies benefit from this increased tourism

3 Scotland's competitive position: the West Highland Lines

Scotland's railways can compete internationally. Readers of the *Wanderlust Magazine* voted the West Highland Line the Top Rail Journey in 2010. Superlative locations on the line include:

- **Highest mountain Ben Nevis**
- **Highest Network Rail station Corrour**
- **Most westerly British station Arisaig**
- **Iconic *Harry Potter* viaduct Glenfinnan**
- **Largest loch Loch Lomond**
- **Longest loch Loch Awe**
- **Deepest loch Loch Morar**
- **Britain's Outdoor Capital Fort William**
- **Scotland's Seafood Capital Oban**
- **Connects to CalMac Oban ferry port for Mull, Iona & the Western Isles**
- **Links via Mallaig ferry to Skye, voted in the Top 10 European Islands category of US-based Conde Nast Traveller's Readers' Choice Awards.**



West Highland destinations are Oban for the Mull ferry, or Mallaig for the Skye ferry (above)

A superb tourism marketing opportunity !

Improving the product needs to focus on Train Service, Journey Experience, and Marketing.

3.1 Train Service

- Frequency – only 3 trains per day to Oban
- 6-hour gaps between the 12.21 and 18.21 departures from Glasgow to Oban/Mallaig
- Capacity – limited by train and passing loop lengths
- Lengthy journey times – low speed 19th century alignment
- Reliability – generally good

Issues:

Can timetable be reviewed to fill gaps in service?

Can peak capacity be increased to boost tourism?

Is there any scope for journey time reductions?

3.2 Journey Experience

Class 156 trains used on the West Highland Lines are adequate for short distance commuter trips but are not optimal for long journeys of up to 5 hours on the West Highland Lines.

- Seating is rather cramped
- No air conditioning: noisy and draughty when windows open
- Trains are freezing in cold weather
- One toilet per 138 seats insufficient on long journeys
- Views are often obscured by trees

Issues:

Can the Class 156s comfort and facilities be improved?

Alternatively, can better trains be cascaded to WHL?

Would use of Class 170 Turbostars extend journey times?

Can vegetation be cleared on scenic sections of line?



On board a Class 156 train on the West Highland Line

3.3 Marketing and Event Opportunities

There is a leisure market of over 3 million people in Central Scotland. Some of these are reached through ScotRail's customer loyalty club offers. More widespread advertising in stations for WHL trips could generate more visits to tourist destinations, and more revenue for rail services.

Marketing could be expanded outside the rail user community to tourist offices, hotels etc. The **Festival** brings many tourists to Edinburgh, expanding the market for scenic rail trips.

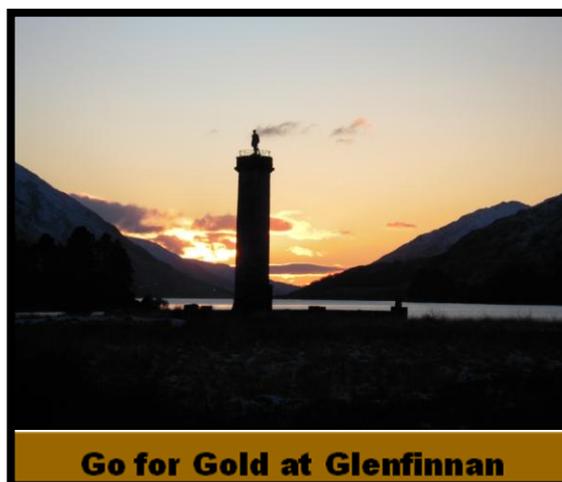
Events including the **Olympic** and **Commonwealth Games** will bring many visitors to London and Glasgow. The opportunity should be taken to attract many of these tourists to visit destinations in the Highlands and other parts of Scotland by rail.

The 2012 London Olympics is an opportunity to develop a marketing campaign, extending the kind of ideas shown below with co-operation and funding from VisitScotland and ScotRail.

2012 Olympic Highland Fling

from **London** by rail via Glasgow
to the world famous

WEST HIGHLAND LINE



Escape to the magic of the Highlands
www.westhighlandline.org.uk



4 Future Development

4.1 Rail Service Upgrade

Key to attracting more active tourists to the West Highlands is the issue of capacity on the trains. In the peak summer season, trains are busy and capacity is limited by the stock available. However, the wider economic benefit to the remoter areas of Scotland justifies higher priority for a West Highland Lines timetable upgrade. Transport Scotland and ScotRail should be asked to investigate options.

In 2010, ScotRail introduced an Edinburgh-Oban excursion train on summer Sundays. It is hoped this excellent initiative is developed in future years. **ScotRail's plans for 2011 are shown in Section C.**

4.2 Combined Rail, Cruise and Coach Tours

The growing popularity of rail tourism could be extended by combining forces with CalMac's high quality ferry services to offer combined "package" trips by **rail and ferry**, with inclusive tickets and joint marketing to generate more rail and ferry revenue. West Highland rail/ferry trips could include:

- Glasgow - Oban - Mull
- Glasgow/Fort William – Mallaig – Skye
- Fort William- Mallaig- Small Isles

Combined **rail and coach** tours could extend the geographical area of public transport tourism, eg:

Lorn-Appin-Lochaber: Glasgow-Oban train, Oban-Appin-Ft William coach, Ft William-Glasgow train

Loch Ness-Lochaber-Skye: Inverness-Loch Ness-Fort William-Mallaig-Skye-Kyle-Inverness

4.3 ScotRail Re-franchising in 2014

The opportunity should be taken to develop the West Highland Lines in the new 2014 franchise:

- Review timetable to increase appeal and capacity for residents and tourists
- Provide upgraded trains (air-conditioning, good visibility, sufficient toilets & luggage space)
- Require bidders to submit their "Tourism and Trains" strategies and marketing budget
- Ensure franchise terms allow flexibility to develop further improvements during the franchise period

4.4 Multi-agency and community involvement

A number of organisations are key to driving forward the service and marketing ideas in this paper:

- Transport Scotland
- ScotRail
- CalMac
- Local coach operators
- VisitScotland
- HITRANS
- Local businesses eg hotel associations
- Passenger Focus

The Scottish Association for Public Transport and Friends of the West Highland Lines would welcome suggestions on how this can best be achieved through a holistic approach to transport and marketing.

5 Other Rural Lines to Stranraer, Kyle and the Far North

This paper focuses on developing the tourist potential of the West Highland Lines.

Similar initiatives for Scotland's other rural routes could boost the tourist industry and local economies in South-west Scotland and the Northern and North-west Highlands. Rail revenue would also benefit.

The Scottish Association for Public Transport hopes to co-operate with local associations including saylisa, and Friends of the Far North and Kyle lines to highlight opportunities in each of these areas.

Photos in Section A by John McCormick. Comments or suggestions on this paper are welcome.

Please forward these to: Chairman, Scottish Association for Public Transport
11 Queens Crescent, Glasgow G4 9BL

Email: sapt@btinternet.com

Mobile:07760 381729



FRIENDS OF THE WEST HIGHLAND LINES
CAIRDEAN NA RATHAIDEAN - IARAINN

Section B

Norman McNab
Friends of the West Highland Lines

The Tree Problem



95% of the rail route through the National Park cannot be seen from the train and the remaining 5% is mainly reduced to brief glimpses.



An Iconic View

- BUT -

The view of Loch Lomond and Ben Lomond cannot be seen from the train because – it is hidden behind the birch scrub.

- **Most of the scenery was visible up until the late 1960s.**
- **Since privatisation suppression of line side vegetation has concentrated solely on that required for safe operation.**
- **Network Rail are not funded to clear vegetation to provide rail travellers with scenic views.**



- The West Highland Lines pass through a spectacular and varied landscape.
- The scenery is world class.
- The line and its engineering are an important part of Scotland's Heritage.

Why do tourists travel on the West Highland Lines?

- Most** tourists travel to *view* the attractions identified above
- Some** travel because they perceive it is 'greener.'
- Nobody** travels because it is cheap and fast.

Disappointment and frustration are inevitable and complaints are frequent.





**This is what passengers don't see.
Yet the Oban train passes just below.**



The White line identifies the West Highland line above Loch Long. A narrow band of trees on the loch side hides the views



In winter time passengers get a partial flickering view but cannot see anything when trees are in leaf.



What the passenger sees for most of the time.



If they are lucky they might get a glimpse of what they are missing.

●If Tourism and Trains on the West Highland Lines means sitting back and enjoying the scenery.....



The priority must be to recover as many of the iconic views as possible.

- It is unrealistic (and impossible) to clear all the views.
- Indeed much of the landscape owes its beauty to the native woodlands through which the lines pass.
- Even the native oak woods of Loch Lomond are obscured behind a dense flicker of brushwood close to the carriage windows.
- Literally 'You can't see the wood for the trees.'

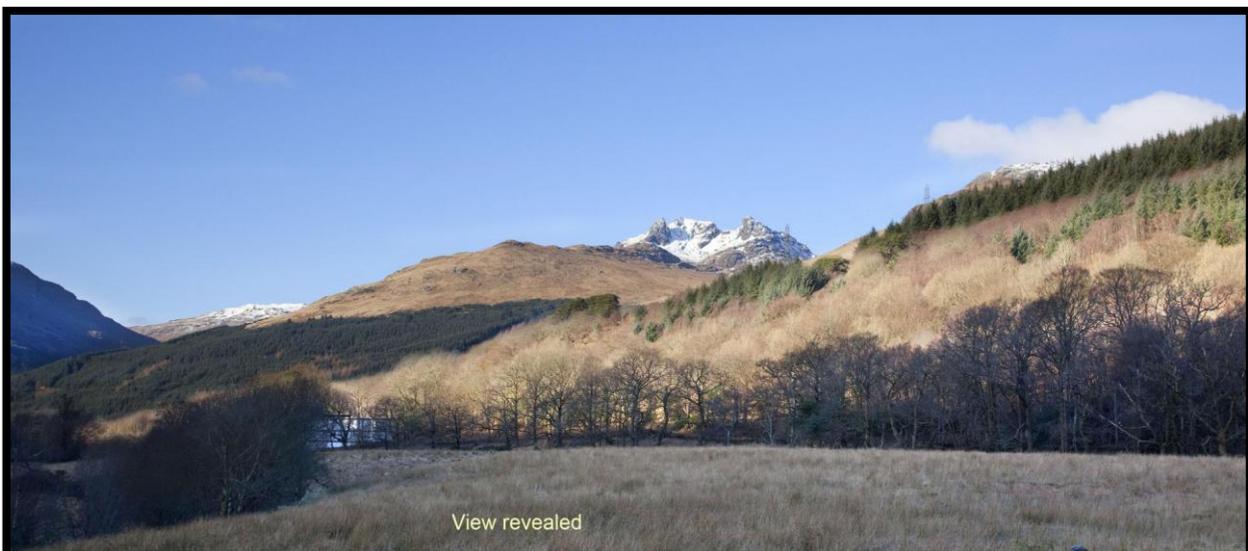


TighnessGap, near Tarbet, Summer 2009(above).



TighnessGap, summer 2010. 350 m length of scrub trees cleared and mature tree crowns raised to provide a clear view for passengers. A successful collaboration between Network Rail, LL&T National Park and Friends of the West Highland Lines. Funded by the National Park's Natural Heritage Grant

The Tighness Scheme was a great success but it only represents about 0.2% of the line length affected (excludes Rannoch Moor).



The view that passengers can now enjoy at Tighness.

A line for all seasons.



The only clear section on the Oban Line.

The Product can be marketed *but*

If it does not deliver what is expected.....

it cannot grow and prosper.

What to do?

The work at Tarbet show what can be done but.....

Network Rail and FWHL have agreed on 25 top locations between Helensburgh, Crianlarich, Oban, Fort William and Mallaig, which would, if cleared, yield the greatest rewards in terms of iconic views.

This could amount to between 5% and 10% of affected route length.

It would cost between £200k and £400k spread over a number of years. Much less if synchronised with Network Rail's planned work programme.

Nothing can be achieved unless money is found to carry out this work.

Final thought.

With every year that passes more is lost. For example:

The beautiful section between Crianlarich and Tyndrum Upper Station is rapidly disappearing behind shrub growth.

The 5 miles of spectacular wild landscape by Loch Treig side has all but disappeared within the last 5 years.

Photos in Section B by Norman McNab, Friends of the West Highland Lines.

Section C

**By Graeme MacFarlan
Marketing Manager
First ScotRail**

EDINBURGH - OBAN 2010

This "test" service operated on 6 Sundays throughout summer 2010 from 25 July to 29 August inclusive. The key objective of this was not about revenue and profit, but instead about testing the appetite for a direct Edinburgh to Oban service on selected days to help open up the West Highlands to the day out market from Edinburgh.

During this period bookings were steady and showed week on week increase as awareness of the service grew. As this was a test service we needed to limit our financial exposure and so the promotional support budget was very modest - this covered some targeted press advertising as well as station promotion.

The booking profile, coupled with the positive levels of interest we received from Tours and Groups, does show demand for such a service which is only likely to increase when established as a scheduled service.

EDINBURGH - OBAN 2011

On the basis of the 2010 experience, it is our intention to bid for this path again for 2011 covering an extended travel period of 10 weeks. This would offer 10 x Sunday day out opportunities from the last two Sundays in June throughout the July and August period. In addition, a Falkirk High pick up has also been requested to extend the offer further.

At the time of writing this, we are awaiting confirmation from Network Rail on what can be offered in response to our bid.

There are a number of additions over the above service offering in 2010 which will help support our 2011 offering in a more stable way.

**Graeme McFarlan
Marketing Manager
First ScotRail
7th December 2010**