

PUBLIC TRANSPORT & TOURISM IN IRELAND

June 2016



itic

Irish Tourist Industry
Confederation



Railway Line - Killiney, Co. Dublin

This report was prepared for ITIC by CHL Consulting Company Ltd.

70b Patrick Street
Dun Laoghaire, Co Dublin
Tel: +353 1 2844760
Email: mail@chl.ie
www.chl.ie

CONTENTS

	Page No.
Executive Summary	i
1. BACKGROUND AND CONTEXT	1
2. MARKET REVIEW & SUPPLY ANALYSIS	4
2.1 <i>The Structure of Public Transport in Ireland</i>	4
2.2 <i>The Product</i>	5
2.3 <i>Pricing, Ticketing and Promotion to Tourists</i>	11
2.4 <i>Integration</i>	14
3. DEMAND ANALYSIS	17
3.1 <i>Volume</i>	17
3.2 <i>Characteristics</i>	18
3.3 <i>Influencing Factors</i>	20
3.4 <i>Consultation Feedback</i>	23
4. THE INTERNATIONAL PERSPECTIVE	25
4.1 <i>International Trends</i>	25
4.2 <i>Comparator Review</i>	26
5. CONCLUSIONS AND RECOMMENDATIONS	33
5.1 <i>Prospects</i>	33
5.2 <i>Recommendations</i>	35
6. APPENDICES	38
Appendix 1: <i>Bus Éireann's Wild Atlantic Way Guide</i>	38
Appendix 2: <i>Irish Rail's Trips by Rail Guide</i>	41
Appendix 3: <i>Tourism and Public Transport – Best Practice Toolkit, Madeira</i>	44

EXECUTIVE SUMMARY

This report on Tourism and Public Transport from the Irish Tourist Industry Confederation (ITIC) takes a closer look at the characteristics of public transport in the context of use by visitors to Ireland. It assesses demand patterns from overseas visitors, examines supply issues and explores how best to improve the appeal of public transport for tourists. For the purposes of this report, public transport is defined as bus and train transport available for shared use by the general public. It excludes internal air and ferry services as well as city tour buses. As outlined within this report it has been identified that there is an opportunity for public transport operators to grow their business from tourists by adopting 3 primary strategies:

- Service improvements
- More effective pricing
- Improved promotion

Tourism and transport are currently overseen by one Government Department in Ireland - the Department of Transport, Tourism and Sport (DTTAS) - which is considered an advantage as it allows for integrated policy development, planning and implementation. Tourism is a logical and suitable fit with Transport. The Department recognises the importance of public transport and the need to support sustainable transport for a variety of reasons. These include public transport's role in improving quality of life and accessibility for all; improving economic competitiveness by reducing congestion; reducing localised air pollutants and greenhouse gas emissions; and reducing dependency on imported fossil fuels. There has been considerable investment in public transport in Ireland in the last fifteen years, with a resulting improvement in infrastructure, rolling stock, services and information provision.

Seven state agencies are involved in delivering public transport in Ireland, with 10% of bus routes recently offered to public tender. Of these agencies, the work of Transport for Ireland in integrating public transport is particularly significant from a tourism perspective. One element of this has been the establishment of seventeen Transport Co-ordination Units set up to address the challenges of delivering rural transport under the Local Link brand.

In terms of individual public transport operators, Dublin Bus is responsible for the greater proportion of public transport trips in the country, with almost 119.5 million trips in 2015.

This compares with 34.6 million passengers on Luas annually, 39.8 million on Irish Rail and 30.2 million on Bus Éireann. In addition, licensed commercial bus services, including rural transport providers, account for over 22.4 million passengers.

Present Position of Public Transport & Tourism

Most state-owned companies are making efforts to encourage tourists to use scheduled services, although there is room for improvement in terms of visibility and awareness. A broad range of visitor ticket options are available for public transport in Ireland but not all are available for purchase in advance or online, and many are limited in terms of modal integration.

During consultations undertaken as part of this review, the need for integrated feedback as well as improved communication between transport operators and the tourism industry were consistently mentioned as key areas for improvement. Additionally, no measurement of tourist use of public transport in Ireland exists at present, making it difficult to assess the success or otherwise of existing products and promotions. However, from a resident's perspective, there is general satisfaction with public transport in Ireland, albeit with scope for improvement in consumer satisfaction with regard to access to, and the cost of, public transport in urban areas when compared to EU averages.

In terms of tourism usage of public transport, Ireland is considered predominantly a touring destination. Nevertheless, 57% of overseas visitors don't use a car during their stay and this proportion has remained relatively constant over the years. This equates to ***approximately 4.6 million visitors in 2015.***

The business and VFR (Visiting Friends and Relatives) segments are strongly represented among non-car using tourists (as they were among public transport users when that category was last measured in 2010) and non-car tourists also show evidence of being more familiar with Ireland, with a high level of repeat visitation.

Leisure tourists on the other hand - especially domestic holidaymakers - are more inclined to use a car than other market segments, apart from in Dublin, where 70% of holidaymakers don't use a car, making public transport an obvious choice in the capital. British visitors are the most likely to use cars but they also have high business and VFR elements and, moreover, account for the largest single market among tourists not using a

car. Mainland European countries, on the other hand, are the least likely to use a car, and one in five American visitors finds driving in Ireland difficult.

Conclusions & Recommendations

General trends towards greater urbanisation in high-income countries is encouraging higher levels of public transport use and decreasing car ownership among some market segments. Internationally, barriers to public transport use by visitors include lack of information, ease of use and tour complexity.

In that context and in the medium to long term for Ireland, prospects are good and public transport usage by tourists is expected to grow at a higher rate than general tourism, as investment continues and usage by residents also increases, reaching a minimum of 5.3 million visitors by 2020. Greater use of public transport by tourists should be welcomed. It is an environmentally friendly way to experience Ireland and a strong public transport network should help alleviate any city centre capacity shortages and improve regional spread of visitors.

A number of recommendations are made as to how greater usage of public transport by tourists can be encouraged, as summarised below:

- Improve the consistency in the use of online and mobile technology for tourism product ticketing.
- Agree and establish forms of measurement with regard to tourists' utilisation of public transport and monitor on an ongoing basis.
- Improve promotion of scheduled services to visitors by operators and state agencies.
- Encourage rural transport operators to integrate scheduled services with key tourism facilities during peak season.
- Promote scheduled services to tourists as short break products, particularly with a focus on securing regional spread.
- Promote scheduled services, individually and as part of a bundle, to tourism segments that have the greatest potential to use such services. More looped regional transport routes would help alleviate the need to return to Dublin's key bus or rail stations.
- Develop a number of themed experiences for visitors, based on scheduled services.
- All future investment in public transport and planning to take account of tourists needs.

1. BACKGROUND AND CONTEXT

It is internationally acknowledged that public transport has a number of significant advantages over private transport. Environmentally, it is responsible for less greenhouse gases and noise/vibration, as well as greater efficiency in fuel use. Socially, it reduces the impact of traffic and encourages connectivity within communities as well as between communities and services. Financially, consumer savings provided by high quality public transport can be greater than the incremental costs of such services¹.

It is also widely acknowledged that public transport serves a variety of essential roles in tourism - providing a connection between the home country of a visitor and their destination (i.e. access transport which, as is the case in some European countries, can be provided by the same provider as internal public transport); providing a way of getting from one place to another within a destination; and also acting as an experience in its own right. There is also a recognition that increased use of public transport by tourists provides additional revenue for operators, thereby supporting re-investment and helping to make systems more economically viable.

Public transport is generally defined as the use of shared, and often state-operated or contracted, bus, ferry, tram, and train transport available for use by the general public - including tourists - to move around an area, excluding transport on city tour buses. This review of public transport and tourism, carried out on behalf of the Irish Tourist Industry Confederation (ITIC), focuses exclusively on internal public transport, excluding internal air and ferry services.

The review takes place in the context of several strategic reports, among them the Government's *People, Place and Policy Framework*, The National Transport Authority's *Statement of Strategy 2015-2017* and CIÉ's *Group Strategy 2015-2020*. There are also many other reports, plans and reviews, too numerous to mention, that focus on the need to provide cost-effective, sustainable, user-friendly public transport for Ireland.

¹ For example, the Victoria Transport Policy Institute found that creating high quality systems requires residents to pay \$268 in annual subsidies and \$108 in additional fares, but saves about \$1,040 in vehicle, parking and roadway costs, providing 277% annual return on investment.

At a national level, the State has identified public transport as a key priority for development and has invested significantly in it over the last ten to fifteen years, in infrastructure as well as in services and technology. These investments include²:

- the opening of a new terminal at Dublin airport;
- extension of the motorway network, which now extends to 1,200km;
- renewal of mainline rail network and rolling stock;
- development of bus corridors, fleet replacements and expansion programmes in Bus Éireann and Dublin Bus;
- Luas development;
- rail and bus stations.

Further investment included the Regional Cities Programme which, for example, saw funding amounting to almost €12.2 million provided by the Department of Transport, Tourism & Sport during 2012 in relation to various traffic management, bus priority and sustainable transport projects. In addition, Sustainable Transport grants provided funding of €38.79 million in 2012 for improved transport facilities and public realm for pedestrians and cyclists.

However, there are still a significant number of planned developments, including:

- the Cross City Luas (opening end 2017);
- the Metro North, which will include an airport stop (due for delivery 2026/2027);
- the DART expansion;
- the reopening of the Phoenix Park tunnel in late 2016;
- a second runway at Dublin Airport (due for completion by 2020).

Of all of these, the Metro North is particularly relevant from a tourism perspective as it provides quick and easy connection with the airport and is also what visitors are used to in other destinations where airport rail links are the norm. We understand there may be an opportunity to bring the development of this important project forward, which ITIC would support. Additionally, a light rail airport connection will link visitors into the broader transport network, facilitating onward connections by public transport.

² People, Place and Policy Framework

All of these investments help overall traffic management, encourage a modal shift from the use of private cars and create a better experience for both residents and visitors.

There have also been other developments that are relevant in terms of context for this review. Within the tourism market itself, where Railtours Ireland First Class has been the provider of rail-based tours aimed at overseas visitors since 1998, Ireland is seeing the arrival of several new operators that use public transport. These include the high-end Belmond hotel and leisure company, operators of luxury rail tours, as well as Superbreak Holidays. Other international operators have seen the potential in public transport provision in Ireland, especially on the airport routes - including Aircoach, a subsidiary of UK-based FirstGroup, and City Link, owned by Singapore-based Comfort DelGro.

More broadly, the internet has facilitated an increase in online booking engines that allow consumers to book public transport in advance. Not only is it now possible to reserve seats and tickets before travelling, consumers are also able to book multi-country travel via scheduled services, for example an integrated trip via rail, bus and sea from one country to another. While this is not overly familiar to Irish residents, living on an island, our European visitors are well used to booking public transport tickets across country borders.

And there have also been changes in consumer behaviour that may have an impact on demand for public transport, as we will see in Section 2.2.

Noting these factors, it is timely for ITIC and the tourism sector to take a closer look at the characteristics of public transport and to assess what the potential value of the visitor market is for public transport operators. The objectives of the review include identifying:

- current and future demand patterns from overseas visitors, including key trends;
- supply issues and the integration of visitor and resident demand for public transport by road and rail;
- how best to improve the appeal and meet visitor needs within the context of economic viability;
- the environmental benefits of greater public transport use by visitors.

We are grateful to all those who contributed to this review, by way of supplying information or sharing perspectives, and trust that it will prove to be a useful foundation for further discussion and action.

2. MARKET REVIEW & SUPPLY ANALYSIS

2.1 The Structure of Public Transport in Ireland

Public transport in Ireland has long been primarily provided by State-owned services, although a significant number of private bus operators provide scheduled services that form an integral part of the public transport network, and recent changes in the licensing of bus routes will allow an increase in competitive tendering, as mentioned later in this Section.

Seven State agencies, under the aegis of the Department of Tourism, Transport and Sport, are involved in delivering public transport in Ireland:

- CIÉ (holding company)
- Bus Éireann
- Dublin Bus
- Irish Rail / Iarnród Éireann
- Transport Infrastructure Ireland
- National Transport Authority (NTA)
- Railway Safety Commission.

The NTA has a vital role, from a tourism perspective, for a number of reasons.

- **Firstly**, it is the agency involved in the supply of various public transport services, such as the contractor/funder for any Public Service Obligation (PSO) contracts (e.g. with Dublin Bus, Bus Éireann and Iarnród Éireann), via subcontracting (e.g. Transdev's operation of the Luas) or as the licensing authority in relation to commercial bus services and the small public service vehicle industry. The provisions of these licenses are in accordance with the Public Transport Regulation Act 2009.
- **Secondly**, it is responsible for delivering Transport for Ireland - the 'single public transport brand' for the integrated delivery of public transport services in Ireland that includes real time passenger information and a national journey planner, as well as being the vehicle to deliver the integrated ticketing project. Transport for Ireland is further discussed in Section 2.1.4.

- **Thirdly**, it works in conjunction with city authorities in the development of urban transport initiatives, e.g. the joint Dublin City Centre Transport Study, and is responsible for additional transport-related research.

CIÉ is also particularly relevant as the statutory body providing State-operated bus and rail public transport for passengers and rail freight services, and is currently the national body with main responsibility for the provision of socially necessary public transport services. It reports to the Minister for Transport, Tourism and Sport and is organised into three subsidiary operating companies supported by a central services function: Bus Éireann, Iarnród Éireann and Dublin Bus. It is also active in areas that are not public transport related but are relevant from a tourism perspective e.g. CIÉ Tours, Dublin ‘Hop on Hop off’ franchise, rail freight and port activities³.

The **Coach Tourism and Transport Council (CTTC)**, as the only body representing non State-owned operators, is also of significant importance and represents the interests of approximately 65 private bus operators and coach touring companies. It is estimated that about half of these offer scheduled services⁴.

2.2 The Product

2.2.1 Overview

Both the public transport product itself and the national approach to its provision have been undergoing significant changes in the last ten to fifteen years, as the country has had to tackle the increased urbanisation and expenditure associated with the Celtic Tiger years and, subsequently, the contraction during the recession. The detail of these changes is beyond the scope of this review but was referred to in Section 1 and further reading of the reports referred to in the footnotes will provide a greater understanding of the scope of development in infrastructure and services. However, as we review the product supply and demand those that are particularly relevant from a tourism perspective will be mentioned. It should be noted at the outset that there is no evidence of dissatisfaction with the *quality* of public transport generally in Ireland at the moment and the country rated highly in terms of user satisfaction with its cleanliness and maintenance⁵.

³ For more detail on the structure and organisation of the CIÉ Group, see: <https://cieportal-public.sharepoint.com/Pages/cie-group-strategy.aspx>

⁴ Coach Tourism in Ireland - A Review, CHL on behalf of ITIC & ITOA.

⁵ Europeans' Satisfaction with Urban Public Transport, European Commission 2014

As in other countries public transport in Ireland is dominated by bus and rail transport. It is State-subsidised and still provided mainly by State-owned operators (Iarnród Éireann, Bus Éireann, Dublin Bus), with a number of private bus companies also operating scheduled public transport services across the country. In total, there are approximately 127 active bus licenses, and routes and services include local, regional, non-stop express and airport.

Table 2.1 shows the volume of trips accounted for by the various State-subsidised agencies and clearly illustrates the greater relative demand for Dublin Bus although Luas is the fastest growing form of public transport with an increase of over 6% in passenger numbers in 2015. In the greater Dublin area, for example, bus transport carries 60% of all city-bound public transport trips.⁶

Table 2.1: Passengers Carried on State-Sponsored Public Transport, 2015*

Public Transport	Passenger Numbers
Dublin Bus PSO	119.5 Million (up 2.8%)
Bus Éireann PSO	30.2 Million (up 1.7%)
Luas	34.6 Million (up 6.1%)
Irish Rail	39.8 Million (up 5.3%)
PT Share of All Journeys (2014)	5.8% (up from 5.2% in 2012)

* Provisional; Source: Transport Trends, April 2016, DTTAS.

In addition to passengers on state-sponsored transport, licensed commercial bus services through the Greater Dublin Area (GDA) carried 13.9 million passengers in 2014 (the most recent available statistics for this sector). Outside the GDA, these services carried an additional 6.7 million and almost 1.8 million were carried by rural transport providers.

The NTA regulates the provision of services by licensing in accordance with the Public Transport Regulation Act 2009, and a decision in recent years to put some of the subsidised routes out to contract is resulting in 10% of bus services being procured through an open tender in 2016. Currently, commercial passenger journeys account for only 12% of total bus journeys, with PSO services accounting for the majority. PSO services are

⁶ Integrated Implementation, 2013-2018, NTA

currently provided by Dublin Bus, Bus Éireann, M&A Coaches, Whartons Travel and the Rural Transport Programme⁷.

It is also worth mentioning that Irish Rail, Bus Éireann and Dublin Bus are all involved in a variety of tourism products, including Railtours Ireland First Class and SailRail (both of which use scheduled rail services), Dublin City Bus Tours, day tours from Dublin and Cork, and Eurolines.

2.2.2 Urban Public Transport

Even from the brief overview of the public transport product just presented, it is clear that there is a difference between the product in urban and in rural areas. Within urban areas, Dublin - with its large population - has the greatest variety of public transport options, as is illustrated in Table 2.2.

Table 2.2: Public Transport Provision in Urban Areas⁸

City	Buses	Urban Rail	Metro	Light Rail	Ferry
Dublin	✓	✓	Planned	✓	
Cork	✓	✓			✓
Limerick	✓	✓			
Waterford	✓	✓			
Galway	✓				

In addition, urban authorities and the NTA identify reducing reliance on private car transport in urban areas as a key priority. For example, the Dublin City Development Plan 2011-2016 set out objectives to enhance overall movement in the city, including "modal share targets crossing the canals of 55% for public transport, 15% for cycling, 10% for walking and 20% for private car use by 2017." Actual estimates for 2014⁹ were 48% for public transport, 5% cycling, 10% walking and 33% for private car - with ongoing gradual increases in modal share for cycling and walking, and decreases for private car usage. These objectives are further supported by comprehensive plans for improving public

⁷ This and more data available from the National Transport Authority, <https://www.nationaltransport.ie/publications/statistics/bulletins/>

⁸ Ferry in Cork is the Passage West ferry, frequently used by those travelling to the south of the city.

⁹ Dublin City Council's Canal Cordon Count, published 2015.

transport provision and usage in the Greater Dublin Area, including parts of Meath, Kildare and Wicklow, as identified in the Transport Strategy for the Greater Dublin Area 2016-2035.

However, despite this variety of mode options, a recent EU study¹⁰ of urban public transport found that Ireland was the lowest ranking country when it came to proximity to transport services. Only 62% of Irish urban residents said it took less than 10 mins to get to the nearest bus, train or tram, compared with 90% in Luxembourg and 89% in the Netherlands. And 31% reported public transport services to be between 10 and 30 mins away.

2.2.3 Rural Public Transport (RTP)

On the other hand, the low level of demand outside of urban areas means that providing public transport in rural areas is not easy. The bus network is the most important option outside of urban areas, as is illustrated in the Bus Éireann map - with its obvious hub/spoke pattern of routes originating and ending in the major urban areas.

In contrast, the national rail network - although historically more widespread - is much more limited than the bus network, leaving large parts of the country unserved.



¹⁰ Europeans' Satisfaction with Urban Public Transport, European Commission 2014

Figure 2.1: Bus Éireann Network Map



Figure 2.2: Irish Rail InterCity Map



The approach to providing rural transport has undergone several changes in the last decade. The current RTP model, only established in recent years, is based on 17 Transport Co-ordination Units (TCUs) that have a key role in integrating county transport planning services, as well as facilitating a community car scheme and local hackney licensing. With the formation of the TCUs, the Local Authorities have a role in local public transport planning for the first time as they will prepare annual transport plans in consultation with their respective TCU. Local Link is the national brand for rural transport.

2.3 Pricing, Ticketing and Promotion to Tourists

Attractive, easy to understand, fares are vital in encouraging greater use of public transport. It could be argued that it is particularly important for this area to receive additional attention in Ireland given the lack of satisfaction by residents with current pricing. The EU study on urban transport, previously referenced, found that 44% of Irish were dissatisfied and only 9% very satisfied with the price of public transport (compared with the highest, Malta, where 44% were very satisfied with price).

The NTA is responsible for approving fare adjustments, including promotional fares, and is working to simplify fares and bring consistency, including:

- simplifying Dublin Bus and Luas fares by reducing the variety of products on offer;
- developing more consistency across operators in terms of pricing;
- increasing the differential between Leap card (see below) and cash fares, thereby encouraging greater cashless transactions (speeding up time at stops);
- developing multi-journey incentives through the Leap card.

One of the most significant developments in terms of integrated pricing and ticketing - and associated promotion - has been the introduction of the integrated, multi-journey, transport card, Leap card. From a limited trial operation, Leap is now available not only in Dublin but also in Cork, Waterford, Limerick, Galway and Wexford, and its fares are approximately 20% cheaper than cash single fares. There is also a Visitor Leap Card available in 24 hour, 3 day and 7 day versions - which can only be bought once in the country and from specific outlets (i.e. it cannot be bought online).

However, Dublin Bus has been offering its Freedom Ticket for the last ten years, aimed specifically at the visitor market and integrating airport transfers, city tour buses and public transport for an inclusive price of €33 for 72 hours unlimited travel. The Freedom Ticket also includes free/reduced entrance to a variety of attractions, restaurant deals and a free map/guide, as well as offering the advantage of bringing visitors to the door of major attractions in the city.

Outside the capital city, visitors are faced with a somewhat confusing range of other options that depend, in the first instance, on mode selection. These include the following:

- Rail Explorer and Trekker Four Day tickets on Irish Rail. The Rail Explorer is valid for five out of 15 consecutive days unlimited travel for €160, while the Trekker is valid for four days' consecutive travel for €110. These rail passes can only be bought at ticket offices (i.e. not available online or at a ticket machine).
- Three days' unlimited DART travel for under €22.
- Bus Éireann's Open Road Hop On/Hop Off Tickets cost approximately €60 and can be used for three days' travel out of a consecutive six days. They can also be topped up by purchasing additional stamps. The tickets can be ordered online and displayed on a mobile device.

In terms of tourism promotion, there is little overt mention of visitor information on the homepage of the main, national, public transport operators. What there is requires a degree of 'digging' to find and includes:

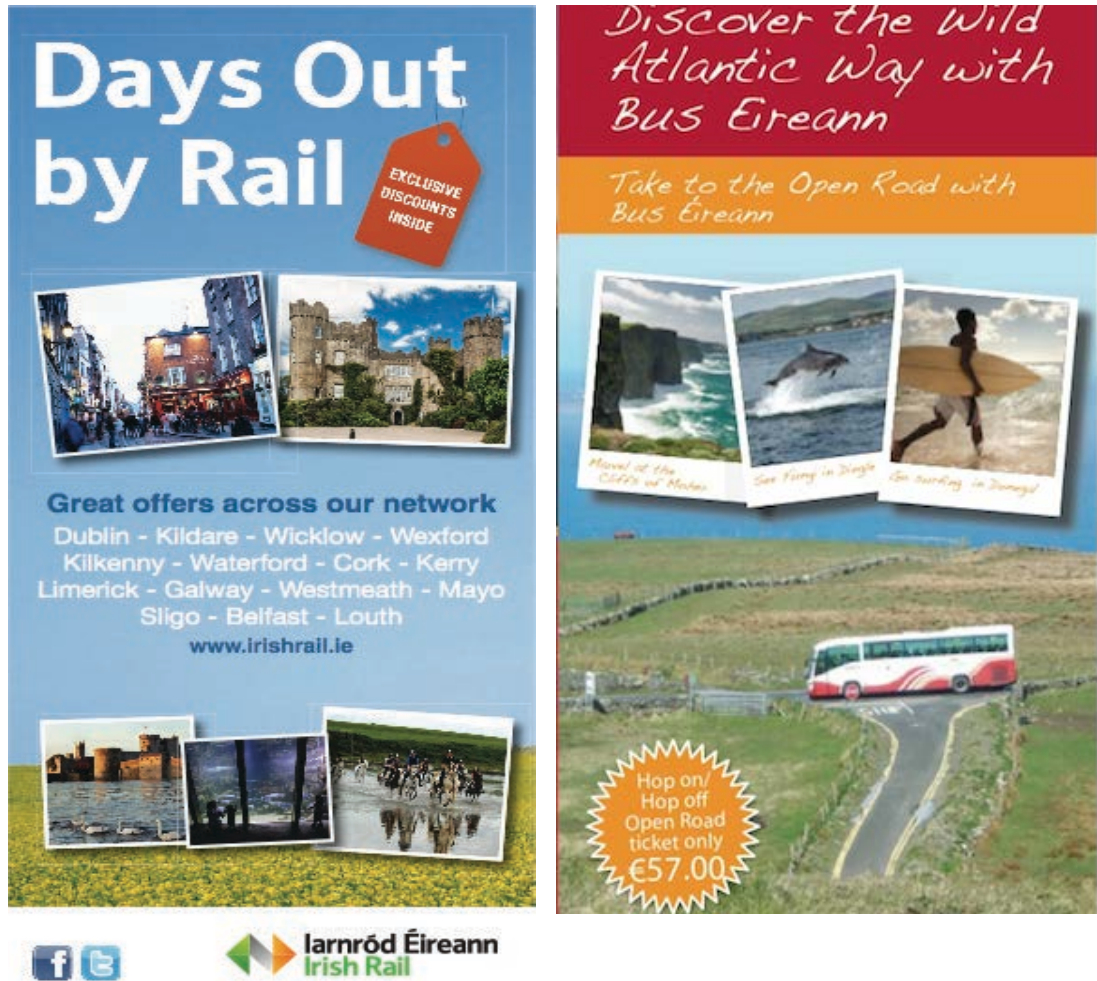
- one rolling banner among several on the Leap website that leads to the Leap Visitor Card page;
- visitor information under 'Tickets' on the Bus Éireann website;
- a small amount of visitor information under the small-print heading 'Tourist Information' at the main Dublin Bus website that leads, if you select sightseeing, to a tourism-specific website;
- visitor information under 'Fares and Tickets' on the Irish Rail website, which includes advice on group travel and the transportation of bikes.

There are also no other language options on any of the main transport operator websites for non-English speaking visitors.

All the same, it is clear that the State-owned public transport agencies are making increasing efforts to attract the tourism market through a variety of methods. In addition to offering the selection of visitor ticket previously mentioned, and the provision of tourism-only products, these efforts include:

- downloadable guides for visitors, e.g. Days out by Rail and the Wild Atlantic Way guide on Bus Éireann (See Appendix 1)
- the promotion and use of scheduled routes as tourism experiences, e.g. Railtours Ireland First Class, the 350 Clare Coast Route.

Figure 2.3: Current Downloadable Visitor Guides



The private operators of scheduled services, although offering a range of well-established nationwide airport routes, are also not strongly promoting to the tourism market. Nevertheless, some do offer products that would appeal to tourists, whether domestic or overseas, such as linking popular transport interchanges with shopping, events and activities. For example, the Dublin Coach website lists a number of shopping centres that it services, one of which is Dundrum Shopping Centre which is linked with the Red Cow Luas stop via its new CityScape brand (also the new 'Gold Standard in sightseeing'). Another example is JJ Kavanagh, which offers a number of day trip destinations where visitors can also avail of discounts at partner attractions, restaurants, and other relevant services/activities.

2.4 Integration

“One of the features of a successful public transport network is how effectively and attractively the opportunities for interchange between various operators and modes are presented¹¹.”

The integration of public transport is a key factor in encouraging greater use of public transport and therefore it warrants attention as an issue in its own right.

Integration is relevant from a variety of perspectives. Firstly, without **integration of planning and co-ordination of effort at a national level**, integration of services, routes, information and pricing is unlikely. Figure 2.4 overleaf illustrates the various elements of a public transport system that require integration from a tourism perspective.

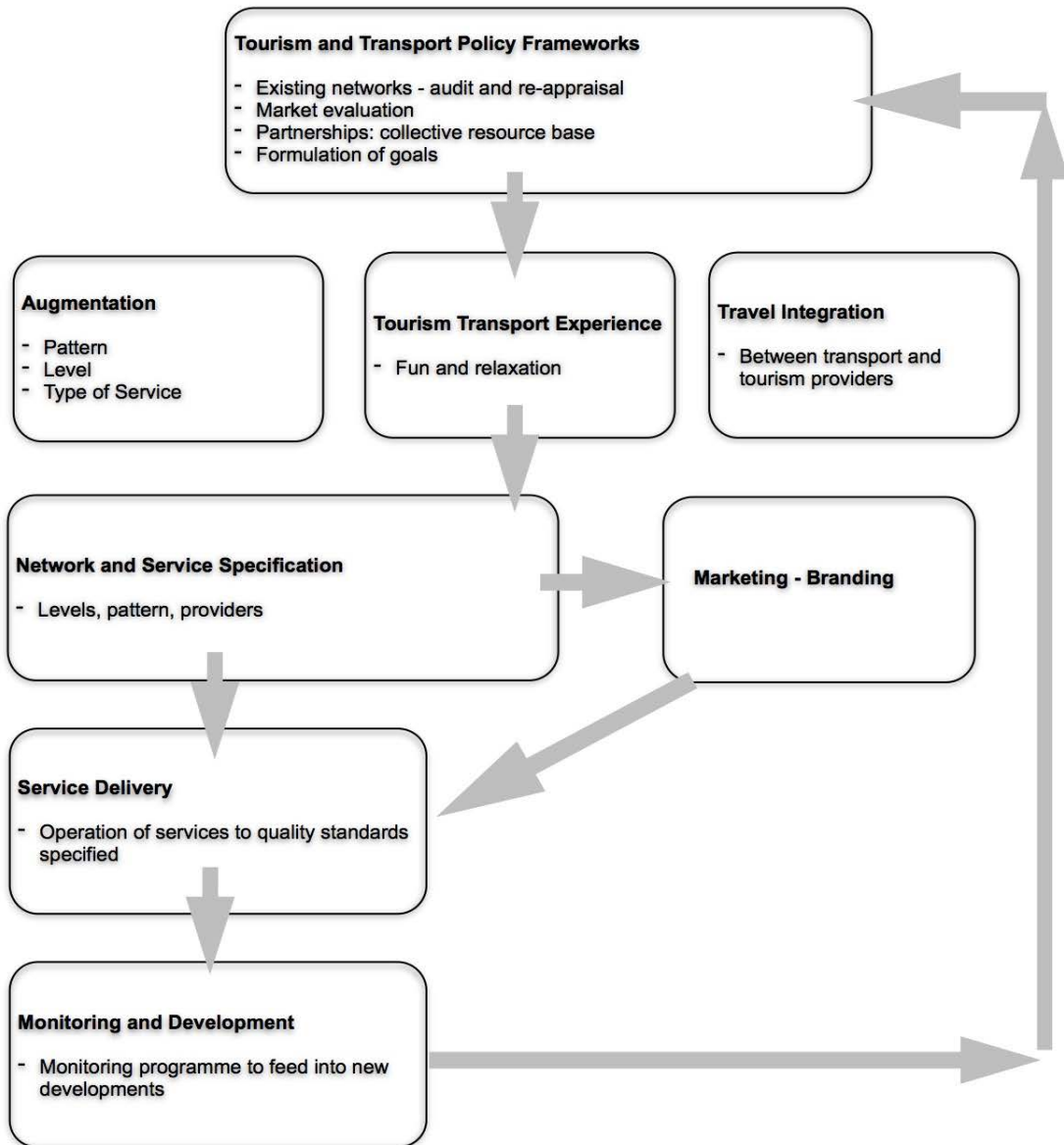
Secondly, as in most countries, in order for a visitor to travel around Ireland by public transport a range of modes are required - for example, airport transfer to Dublin city centre by bus, travel around the city by Luas then regional travel by InterCity bus or rail, finally followed by a local bus route. In order to encourage usage, these **modes need to be physically integrated**, i.e. sharing stops and stations, as well as **integrated in terms of presentation, information provision, timetabling and pricing**.

While there is some way to go in terms of infrastructure integration, as noted previously, the introduction of Transport for Ireland provides both the basis and the mechanism for such integration over the coming years. Created as a result of the Dublin Transport Authority Act (2008), which stipulated the need for a single brand for public providers in the greater Dublin area, Transport for Ireland is a single entity, one stop shop solution encompassing all transport providers and offering:

- Journey planning
- Real time passenger information
- Maps
- Timetables

¹¹ Integrated Implementation 2013-2018, NTA

Figure 2.4: Planning Requirements of a Tourism Public Transport Network¹²



¹² Lumsdon, L. (2006). Factors affecting the design of tourism buses. *Annals of Tourism Research* 33(3): 748-766

“The objective of the brand is to make it easier for consumers including visitors to Ireland, to recognise and interact more effectively with the transport system and to have easy access to information on all aspects of travel such as timetables etc. It supports and enhances the service provision of private and public bus companies and provides reassurance to the public that they are travelling within a national and regulated public transport framework¹³”

It is also intended to operate as co-branding with contracted operators’ brands and the use of the unified brand will continue to increase over the coming years, online and on direction signs, maps, fleet and through other public-facing channels.

In addition, the NTA is working to provide high quality interchange points in various town centres; to alter service schedules or stop locations to ease interchange; to reduce walk times between connecting services; and to provide high standard direction signs to interchanges.

Some of the points previously mentioned are also relevant here, such as the transport operators’ **co-ordination of routes with popular public transport hubs, retail and activities**. Also relevant is the establishment of the TCUs, which will be working to **integrate a wide variety of public transport modes in rural locations** and whose services will be available through the National Journey Planner.



¹³ Integrated Implementation 2013-2018, NTA

3. DEMAND ANALYSIS

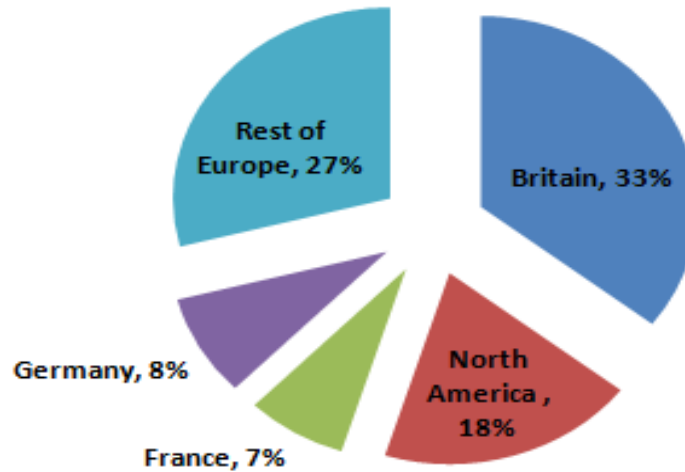
3.1 Volume

The use of public transport by residents in Ireland is on the increase again following the recession, although much of this growth is driven by an increase in and around Dublin. There is still considerable scope for improvement, however, as all those involved with public transport planning are aware and as borne out by EU statistics on usage - Ireland (at 27%) remains below the EU average (of 32%) in terms of residents' usage.

Unfortunately, measuring overseas tourists' demand for public transport is not a straightforward issue. Given the nature of ticket sales, none of the main providers are in a position to separately identify the volume of trips taken by tourists as opposed to residents, and therefore the only national measurement of tourism use of public transport remain the CSO and the tourism agencies. But Fáilte Ireland's Survey of Overseas Travellers (SOT) hasn't asked a question specifically with regard to public transport usage since 2010 and therefore the closest corollary in terms of SOT data relates to non-car users rather than specifically to public transport users. However, when older data on public transport use was compared to current data on non-car users, strong similarities were clearly visible, and therefore we are choosing to use the latter as a proxy measurement in the absence of more specific current data. In addition, it could be argued that those who do not use a private car during their stay, and who aren't on a packaged coach trip or similar, are the most open to using public transport and, therefore, that it is relevant to analyse their characteristics as a target market.

The proportion of tourists using public transport, or not using a private car, during their visit to Ireland has remained relatively static over the years - which means that, in real terms, the actual volume of tourism-related trips on public transport has fluctuated in line with overall tourism trends. In 2014, 57% of overseas visitors didn't use a car while in Ireland (almost identical to the 2012 proportion of 58%) - which equates to over four million tourists¹⁴. This proportion was higher among Mainland Europeans (66%) and relatively lower for British (48%). In terms of overall importance, though, Britain remains the largest individual source market for non-car users, as seen in Figure 3.1.

¹⁴ To put this in context, there were an estimated 216 million trips in total on state-subsidised public transport services the same year.

Figure 3.1: Market Breakdown of Non-Car Tourists, 2014¹⁵

While this level of non-car use appears relatively high, the profile information that follows will more clearly illustrate underlying dynamics.

Measuring usage of public transport by domestic travellers is considerably easier, and certainly it is clear from the profile of the domestic leisure market that private car use continues to dominate, as can be seen in Table 3.1 overleaf. All the same, domestic holidaymakers still accounted for over half a million trips on Intercity bus and rail services in 2013.

3.2 Characteristics

There are some significant differences in terms of tourists' dependency on private car use by segment and by location - which is no surprise given both the varying needs of the different segments as well as the variation in availability of public transport by geography.

By market, British visitors are the highest car users (52%), reflecting easy ferry access. On the other hand, as we saw, visitors from Mainland European countries are the most likely not to use a car (66%) and are therefore the most likely to be interested in using public transport.

¹⁵ Source: Fáilte Ireland

Table 3.1: Domestic Holidaymakers - Modes of Transport (%)

	2009 %	2010 %	2011 %	2012 %	2013 %
Private car	84	85	85	84	86
Intercity train service	10	8	11	11	8
Taxi	19	12	10	10	11
Intercity bus service	10	6	7	8	7
Daytime coach trip	4	3	3	3	3
Coach tour with overnight stays	1	1	1	2	1
Hired car	1	1	1	1	1
Other	2	1	1	1	1

Source: Fáilte Ireland

Non-car using tourists to Ireland also show evidence of being more familiar with the country, with a high level of repeat visitors among non-car users (52%¹⁶), especially from Britain (80%), reflecting the strength of the business and VFR segments from that market. They are also more likely to be travelling alone (62%), although there is a somewhat higher level of shared travel in markets with a higher leisure component (e.g. the US).

When looking specifically at the main reason for non-car users to visit, we can see that they are more likely to be travelling to Ireland on business (26%¹⁷) than the general market (16%), and that there is a lower element of holiday travel (28% v. 48% of the total tourism population), as illustrated in Chart Figure 3.2.

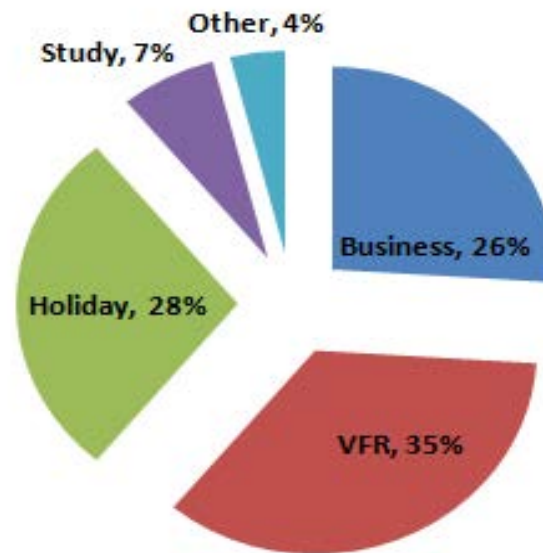
Without a doubt, holidaymakers make greater use of a car than other types of tourists.

Again, though, there are a number of significant variations from the average that are worth noting:

- the British non-car using segment has proportionately higher levels of business traffic than other markets (31% and 46% respectively);
- and, conversely, American non-car users have a higher level of leisure travel (52%).

¹⁶ For comparison, the equivalent proportion for tourists using public transport in 2010 was 47%

¹⁷ The equivalent among tourists using public transport in 2010 was also 26%, with 32% VFR and 32% leisure.

Figure 3.2: Main Purpose of Visit - Non-Car Tourists 2014¹⁸

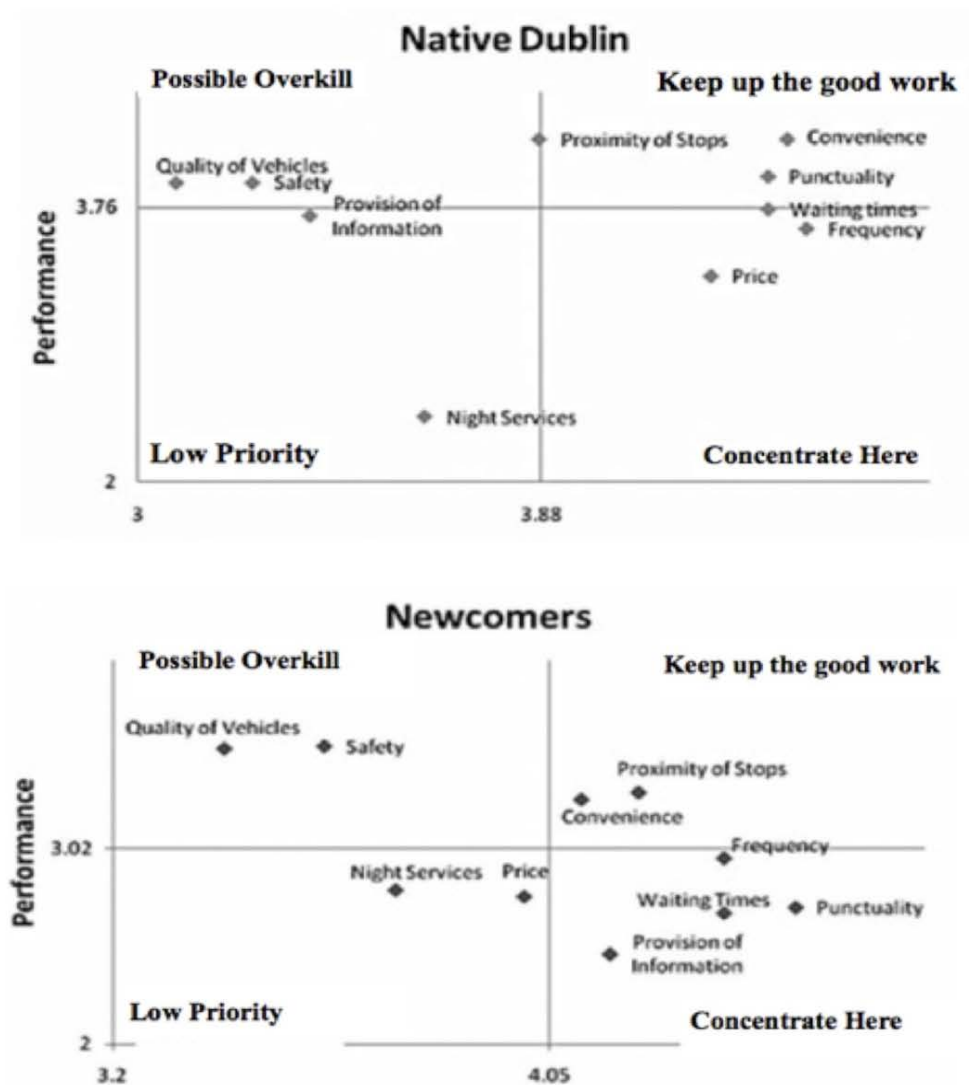
Not surprisingly, given the nature of the city and the ease of public transport use, 70% of holidaymakers to Dublin don't use a car during their visit. Outside of Dublin, however, this ranges from a high of 44% in the South West to a low of 34% in the North West (where bringing their own car is at its highest - 26%). Overall, Dublin accounts for 52% of nights spent by all non-car tourists in Ireland, with the South West accounting for 19%.

3.3 Influencing Factors

Although both visitors and local residents will have some similarity of expectations with regard to public transport, there are differences as well - with visitors' unlikely to be dependent on it for the daily routines of commuting, shopping and leisure. Their pattern of usage is also different as they are more likely to be travelling at off-peak times and on routes that may not be primarily commuter routes - as illustrated in Figure 3.3.

¹⁸ Source: Fáilte Ireland

Figure 3.3: The Importance of Factors Relating to Public Transport in Dublin
Locals v. Visitors¹⁹



¹⁹ An Examination of the Quality and Ease of Use of Public Transport in Dublin, Kinsella & Caulfield

Internationally, a review of research has identified a number of factors that influence tourists’ use of public transport in a destination²⁰. The following are particularly relevant in an Irish context.

Table 3.2: Factors Influencing Visitors’ Use of Public Transport

Reasons FOR Public Transport Use	BARRIERS to Public Transport Use
<ul style="list-style-type: none"> • Avoiding driving in unfamiliar places • Advantages of local transport • Scenic ride • Less hassle re. parking and congestion • Facilitating other activities, e.g. walking, cycling 	<ul style="list-style-type: none"> • Lack of Information • Inconvenience and restrictions • Personal preferences, e.g. convenience & comfort.

Other factors influencing visitors’ choice of, and satisfaction with, public transport include those in Table 3.3.

Table 3.3: Factors Influencing Visitors’ Use of Public Transport

<ul style="list-style-type: none"> • Tour complexity • Travel time / number of transfers • Fare • Quality • Ease of use • Service frequency • Safety • Flexibility • Size of travelling party
--

The same research has identified three main strategies to promote greater use of public transport among tourists:

- 1) **Service improvement:** network connections, higher frequency, improved image, branding and transport/bike combining. Indeed, bike transportation should be made

²⁰ Tourist Use of Public Transport at Destinations, Diem-Trinh Le-Klahn & C. Michael Hall

easier in the context of the State's investment in Greenways.

- 2) **Pricing:** Multimodal tickets, off-peak prices, group discounts, integrated packages with incentives for those who arrive without a car.
- 3) **Promotion:** accessible information, wide distribution of flyers, real time information, incorporation of public transport information in electronic tourist guides.

As we discussed earlier, there are numerous developments underway in Ireland in all of these areas, although much remains to be done (which will be discussed in Section 5). And, with specific regard to Ireland, a number of other factors have been identified as having a bearing on tourists' transport decisions.

- Three-quarters (74%²¹) say suitability for touring was important in selecting Ireland as a destination.
- Americans in particular find driving in Ireland difficult (18%).
- Public transport is not suitable for some segments, for example usage is particularly low among golfers and anglers who need to carry bulky equipment and get to remote locations.

3.4 Consultation Feedback

As part of the review, a number of agencies and organisations were consulted²² and while their perspectives clearly portrayed their respective areas of responsibility, there was general agreement in relation to a number of issues outlined as follows.

Integration is the main challenge facing public transport in Ireland. This relates not only to the integration of services, information provision, ticketing and journey planning - all of which are being tackled already and are ongoing priorities for the NTA - but also to the need to integrate public transport with a variety of tourism 'products' such as the arrival of cruise ships, cruiser hire operators, rural tourism destinations and large events. A possible suggestion in this regard is the development of a designated public transport hub that would service cruise traffic and also facilitate alignment of scheduled services with tourist-related products.

The need for **integrated planning** was mentioned as an issue in its own right, with concern raised in several quarters about the lack of integration between land use development,

²¹ Source: Fáilte Ireland

²² Consultees included Irish Rail, Railtours Ireland First Class, Dublin Bus, tour operators, CTTC, IBRA, IBEC, private transport operators, the NTA, Fáilte Ireland and Tourism Ireland.

event licensing, public transport and tourism needs. It is felt that these are all dealt with in isolation from each other although there is a strong inter-dependence between them. The co-ordinated approach by public transport providers for the 1916 events in Dublin city was cited as an example of how this can work with specific regard to event planning.

Increased communication between public transport providers and the tourism industry, particularly the inbound tour operators, is essential both in terms of ensuring that opportunities for synergy are maximised and that each is aware of the others' agenda. It is recognised that there are opportunities for more bundling and promotion of public transport inclusive packages, provided appropriate trade rates are available. It is also obvious, from feedback, that there isn't widespread knowledge in the tourism industry of existing visitor ticketing options.

There is a view that the state agencies are slow in **promoting public transport to overseas visitors** as a viable alternative to car use, despite some integrated tourism-relevant offerings having been on the market for many years, e.g. Railtours Ireland First Class and the Dublin Bus Freedom Ticket.

Rail is by far the preferred mode of travel for inclusive packaging by tour operators and there remain undeveloped opportunities for high-end, corporate/incentive rail experiences.

While **cycling** is not a mainstream tourism segment for Ireland, it is still a significant niche and one that has a natural affinity to public transport internationally. In addition, ongoing developments in Greenways, such as the Athlone-Mullingar route and the proposed Dublin-Galway one, will further grow demand. The restrictions²³ with regard to the transportation of bicycles by train are an impediment to further developing a niche which would benefit rural tourism in Ireland and would have appeal to many of Ireland's European markets.

Corporate/conference business in Dublin now uses public transport extensively given the improvements over the last decade in service to city centre venues.

Again, with regard to Dublin specifically, there is an urgent need for a **city centre transport centre** that would integrate all modes of transport easily and provide layover facilities, especially for coach operators.

²³ i.e. must be pre-booked and a maximum of two bicycles per train on many routes.

4. THE INTERNATIONAL PERSPECTIVE

4.1 International Trends

Examining usage of public transport in Ireland's key tourism markets is an important element of this review as specific countries can offer examples of 'good practice' from which Ireland can learn. In addition, the level of public transport usage in our core markets is a factor in determining likelihood of visitors considering it when travelling. And there are noticeable differences between the usage of public transport by country and by segment.

In Europe²⁴, older residents (55 years and over) are more likely to *use urban public transport most often for leisure activities* (44%). Among Ireland's core tourism markets, travel by public transport for leisure is particularly high in the Netherlands (59%) and in Ireland itself (58%), while the UK comes in somewhat above average (46%) as do Germany (42%) and France (40%).

The USA, in contrast, is recognised being one of the most heavily reliant countries on cars for transport, with almost *half of American households not having access to any public transport*²⁵. However as in Europe, transport use is stronger in the cities, and cities that have invested in high-frequency transport and transit-oriented development have been experiencing significant growth, with public transport usage growing by a third between 1997-2013.

The *increased urbanisation* of our source markets also has a bearing on public transport usage, as it tends to be generally higher in urban than in rural areas. While 62% of Irish residents live in urban areas, 80% of British, 82% of Americans and 86% of Nordics and French are urban residents - with associated familiarity with public transport.

In addition, the concept of '*peak car*' has been gathering momentum among international analysts - this being the idea that car usage has already peaked in many high income countries and is now on the decline, particularly in urban areas.

²⁴ Satisfaction with Urban Transport, Flash Eurobarometer 382b

²⁵ The American Public Transportation Association

- “Over the last decade – after 60-plus years of steady increases – the number of miles driven by the average American has been falling. Young Americans have experienced the greatest changes: driving less; taking transit, biking and walking more; and seeking out places to live in cities and walkable communities where driving is an option, not a necessity.”²⁶
- There has also been a decline in car ownership among young people in Norway, the UK and Germany too²⁷, as well as declines among middle age groups in the USA and Germany.

Trends in the frequency with which consumers use a private car and the regularity with which they travel by public transport are crucial factors in the medium to long term prospect for tourism use of public transport and therefore the points raised above augur well for ongoing visitor use of public transport in Ireland, provided other relevant factors are also positive.

And finally, another trend that will impact future use of public transport in Ireland is the increasing number of online platforms available through which prospective travellers can research and book cross-country, multi-modal, fares. One example is www.rome2rio.com, which is promoted on the Visit Britain website, links to Transport for Ireland, and allows users to explore a range of integrated transport options including air, rail, bus and sea.

4.2 Comparator Review

While no country appears to have a perfect public transport system, there are some that provide examples worth mentioning in the context of exploring how Ireland might improve or optimise its current product and performance from a tourism perspective. Three countries have been selected for this purpose - Britain, Denmark and Spain - each for specific, and different, reasons. Some additional points have also been added at the end of the section.

²⁶ Millennials in Motion, US PIRG

²⁷ Recent Trends in Car Usage in Advanced Economies - Slower Growth Ahead, The International Transport Forum, OECD

4.2.1 Britain

Although Britain's public transport is operated by a considerable number of different providers, they have, for the most part, been fully integrated and now offer a seamless service to users. One area in which it is particularly strong is *the availability of visitor travel passes that can be bought online in advance*. These are available on the Visit Britain online shop and on the BritRail website, and include:

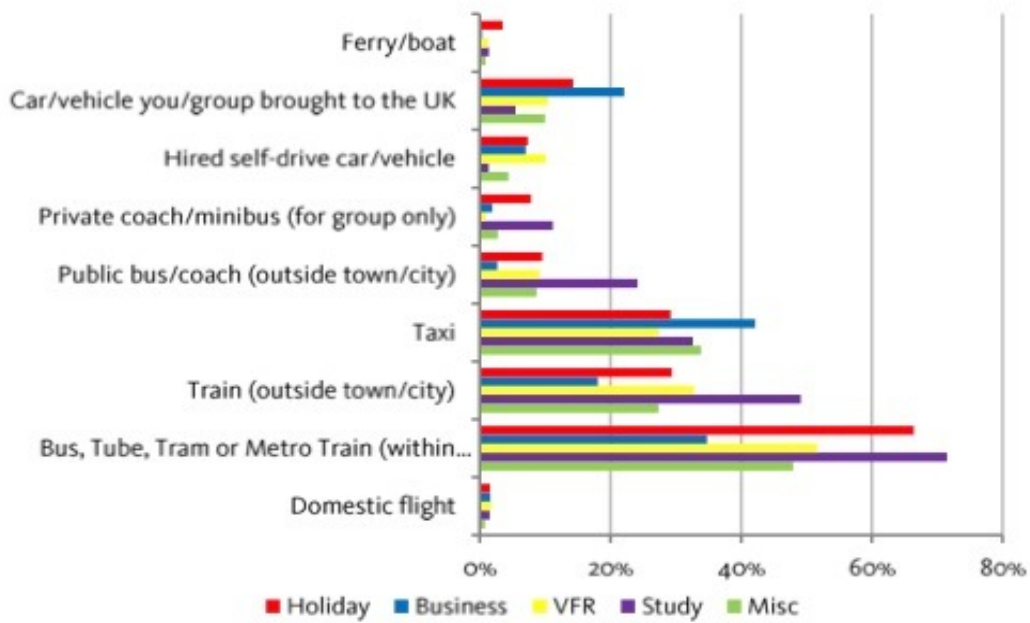
- A paper London Travelcard for use on all city transport
- The Oyster travel smart card for use on all London transport
- A number of BritRail travel passes (flexi, consecutive days and regional options available).

Consumer feedback suggests a high level of satisfaction with the operation of the BritRail passes, mentioning in particular the ease of use and lack of surcharges (common in some countries).

A second point worth mentioning with regard to Britain is the *accurate and detailed measurement* of visitor use of public transport. The British International Passenger Survey continuously measures visitor usage of public transport and publishes detailed reports on the patterns of demand, including mode usage by main purpose of visit (see Figure 4.1 for example), by age and by region visited.

Finally, there is a *strong connection between tourism and public transport* in Britain, particularly in relation to rail travel. The National Trust, for example, recognising that most journeys to properties are by car, has a strong commitment to reducing car-dependent travel to its properties and has adopted a member resolution aimed at reducing the proportion of car-borne visitors to its properties from more than 90% in 1995 to 60% by 2020. Another example of this interconnection is the Community Rail Partnerships, e.g. Devon and Cornwall, who promote their stations, scenic routes and heritage railway lines as attractions in their own right, with accompanying merchandise and promotional activities.

Figure 4.1: Visitor Use of Public Transport in the UK by Purpose of Visit²⁸



4.2.2 Denmark

From a tourism perspective, the Danish public transport system is both user-friendly and efficient. A relatively new, driverless, light rail system brings visitors arriving by air from inside the airport building to the centre of Copenhagen, with a journey time of fifteen minutes. Tickets can be bought in advance, via an automated machine on the platform or using a smartphone (SMS or App). Rail tickets can also be bought for travel beyond Denmark, via automated machines in the arrivals area of the airport.

DSB is Denmark’s national rail operator and it runs regular train services between Copenhagen and towns across Denmark and southern Sweden. Bicycles - an important form of transport in Denmark - can be carried on all trains, either by purchasing a separate ticket or free of charge. Many trains have clear labels on the outside of relevant carriages indicating where bicycles are to be brought on board, and many stations also show which entrances/exits cyclists should use.

²⁸ Source: Foresight June 2014, Visit Britain

The DSB website is available in an English language version and, when read in English, includes clear information for visitors who may be travelling to Denmark for the first time. The Danish Journey Planner²⁹ allows travellers to create their own integrated journeys using bus, train and metro, to check arrivals, departures and traffic, and to research bike transportation, walking distances and a variety of other options. The Planner also allows for integration of overland journeys between Denmark and other European countries. Most stations no longer have a ticket counter anymore and tickets are available for sale in the on-site 7Eleven shop, via machine, smartphone or online.

The three main cities of Copenhagen, Aarhus and Odense all have their own transport passes for visitors that allow for unlimited use of public transport within the city over various timeframes and travel zones. In Copenhagen, for example, there is a seven day FlexCard that isn't personal and can be shared by several people travelling at different times. There is also the City Pass, which is valid for either twenty-four or seventy-two hours, and can be sent directly via SMS to a phone (or a paper ticket can be bought instead). And finally, there is also the Copenhagen Card that, along with free transport in the entire Copenhagen area (including the harbour bus), also offers free or discounted rates at visitor attractions and other tourism-related activities in the city.

Denmark's extensive network of long-distance bus routes is operated by a variety of different companies and is the best mode of transport for more remote areas of the country. Bus operators also provide a variety of shorter regional, seasonal and airport services, as well as a number of bus-based tourism experiences such as the CuBus - an entertainment and wine bar bus with leather sofas - and Tractor Bus and Bedford bus tours.

4.2.3 Spain

As with most of the destinations we have looked at, quite a number of different bus operators are involved in the provision of public transport in Spain.

Bus tickets are bought via the movelias.es website, which is available in a number of language versions including English, and while there are no visitor-specific passes available, there are a number of offers available that promote the use of public transport by encouraging visitors to explore beyond tourism hotspots. Offers include adding a day trip to the beach to a holiday in Seville, taking a two-centre holiday with Granada and Seville, or visiting Toledo while staying in Madrid.

²⁹ www.rejseplanen.dk

However, it is in the area of rail travel that Spain particularly excels. RENFE, the National Network of Spanish Railways, links all the regional capitals, and most of the country, with Madrid and has an expanding network of high-speed trains (AVE). In addition, there are the Cercanías trains, which connect the main destinations in Spain with smaller cities on the outskirts and have frequent departure times. The RENFE Spain Pass is only available to tourists and offers unlimited rail travel for various numbers of journeys.

Spain also offers a wide range of rail-based tourism experiences - the 'tourist trains', each of which has its distinguishing features. Although they are not scheduled public transport products and are, therefore outside of the main scope of this review, they are worth mentioning because they are a good illustration of a public transport provider working with partners in order to offer a creative range of tourism products that are both attractive in their own right as well as helping to raise awareness of a particular form of public transport.

Some of the tourist trains are luxury hotels on wheels, similar to Belmond's new Grand Hibernian or the Orient Express. Others are less luxurious day trips that make use of either vintage carriages owned by partners (e.g. the Railway Museum, Ferrocarril de Sóller) or regular trains, enlivened through theming and guiding. Some examples are given below.

- The Strawberry Train: a day trip from Madrid to Aranjuez during strawberry season in spring, with strawberries served along the route by hosts in period costume. At the destination, there is a guided tour.
- Sóller Train: an historic, narrowgauge, railway that has been running daily since 1912 between Palma de Mallorca and Sóller.
- Cervantes Train: a guided tour from Madrid to Alcalá de Henares, celebrating Cervantes and enlivened with actors.

Figure 4.2: The Cervantes Train



- Galicia offers its own Tourist Trains - seven themed rail sightseeing options supported by a guided service and bus transfers to interesting places as required. Many of the trips are wine-themed, but there is also a lighthouse trip, a pilgrim train and a spa train.

Figure 4.3: One of Galicia's Sightseeing Trains



4.2.4 Other Relevant Examples

In reviewing destinations for good practice, a number of other points worth briefly mentioning were discovered.

- It almost goes without saying that almost all major tourism destinations have easy rail links between the airport and city centres. These help to familiarise visitors with public transport in a new destination, provide an opportunity to easily connect with onward

journeys by public transport and also give a 'sense of place' as visitors get an opportunity to mix with local residents.

- It is common practice for most city destinations to have their own highly-promoted city pass (like the Dublin Pass) that incorporates free transport across all modes within the city along with free and discounted entry to attractions. These are usually time-restricted and available for purchase in advance. Apart from the Copenhagen Card mentioned above, other examples include the Lux Card and the Helsinki Card. It is also worth noting that Luxembourg residents are among the highest users of public transport while the Finnish bus network is considered one of the best in Europe, covering 90% of the country.
- In the USA, new major transportation centres are being developed that provide consumers with access to a selection of transit options along with retail and dining - 'shop, dine, stay, ride'. Examples include ARTIC (the Anaheim Regional Transportation Intermodal Center in Southern California³⁰) and Denver's renovated Union Station³¹ transportation centre.
- A number of EU-supported initiatives have been ongoing to encourage greater use of sustainable transport. SEEMORE (Sustainable and Energy Efficient Mobility Options in Regions in Europe) ran from 2012 to 2015. And there is currently an international urban mobility group - the UITP - of which the Irish state-owned agencies are members.
- A best practice 'toolkit' that was developed for tourism and public transport on Madeira, under the SEEMORE initiative, is included in the Appendix. It advocates the need for accurate measurement of tourists with regard to public transport, close working relationships between transport and tourism operators, and a focus on key areas of tourists' experience (i.e. research and booking, arrival/departure and what they do during their stay).

³⁰ <http://www.articinfo.com>

³¹ <http://unionstationindenver.com>

5. CONCLUSIONS AND RECOMMENDATIONS

5.1 Conclusions

Given the fact that Ireland consists primarily of a rural experience, and one that is frequently selected for its suitability as a touring destination, a wholesale move to public transport is unlikely. As has been noted by other researchers,

“Leisure traffic undoubtedly has a high affinity towards private motorised modes of transport³²”

There has been a consistency in the proportion of non-car tourists in Ireland in the past, and it is relatively safe to estimate that, were nothing else to change, this proportion will continue to be relatively stable in the coming years. In real terms, this means that the volume of tourists most likely to use public transport while in Ireland is likely to increase in line with forecast visitor growth (average of 3% p.a.), as illustrated in Table 5.1.

Table 5.1: Potential Growth in Non-Car Using Tourists to Ireland (millions)

2014*	2015**	2016	2017	2018	2020
4,050	4,605	4,743	4,885	5,032	5,338

*Actual; ** Based on 13.7% preliminary estimate from Fáilte Ireland

However, this is considered to be the lowest level of potential possible as it is both a conservative estimate of tourism growth and doesn't take account of a number of factors that will positively affect public transport usage in the country, of which the main ones are outlined below.

- 1) The ongoing improvements in infrastructure and rolling stock, along with the NTA's work in simplifying and integrating public transport services across the country - including the roll-out of Transport for Ireland - is bringing Irish public transport into line with international best practice and, therefore, into line with what many consumers are used to in their home countries. This, in turn, is likely to increase tourist use - as ease of use is even more important for tourists as they do not have the luxury of time to familiarise themselves with a new system of routes, modes and fares, and for whom language may also be an added barrier.

³² Identifying key factors for the successful provision of public transport for tourism, Kagemeier & Gronau

- 2) Internationally, the gradual decline in car ownership and usage among certain segments, combined with a nervousness in other segments about using a car in an unfamiliar destination, indicates an increased willingness to rely on public transport. This means that destinations with strong public transport may be more attractive than those that require car transport - a positive development for Dublin, as a compact urban destination that is increasingly easy to navigate using public transport. However, it may present further challenges to rural destinations that already find it difficult to attract tourism (see discussion on restrictions below).
- 3) The exponential growth in web-based sales platforms (e.g. www.rome2rio.com, already mentioned), both within country and internationally, supports ease of travel by consumers - facilitating multi-modal and multi-country travel by public transport. Consumers who are already used to air travel being sold in this manner will not find it difficult to migrate to booking long distance public transport in a similar manner as it becomes increasingly integrated.
- 4) The increasing use of mobile technology for both ticket sales and paperless travel also makes public transport usage more appealing to visitors travelling in unfamiliar locations or facing linguistic barriers.
- 5) Finally, Ireland's use of public transport currently lags behind other European countries and therefore, as products and services continue to improve, its level of usage by residents is likely to come at least into line with the continental average. The image of public transport - part of which is its usage by locals - is considered to have a strong bearing on visitor usage.

Taking all of these points into account, we consider public transport usage among visitors is likely to increase above the average tourism growth rate, particularly in the medium to long term, as improvements that are currently in development stages take effect.

5.2 Recommendations

There is still some way to go before many of the planned developments take place - e.g. full integration of all modes in terms of pricing, ticketing, stops and routes, and fully-functioning TCUs. In the meantime, the existing weaknesses in the Irish public transport system continue to frustrate and deter prospective users. In addition, the potential growth indicated above is not without certain challenges and taking steps to address these will help to ensure more even growth around the country.

- 1) Encourage rural transport operators to integrate scheduled services with key tourism facilities and locations during peak-season. Building on pilot experiences already undertaken on an ad-hoc basis (e.g. in eco-tourism areas), rural transport operators could be encouraged to offer in-destination transport for visitors during peak-season - integrating scheduled services with pick-up at key points and hop-on/hop-off at rural accommodation providers, attractions, stations, town centres, trail heads, and other tourism-relevant locations. The definition of what constitutes a 'destination' can be flexible - for example, it can be a county, a touring zone (Ireland's Ancient East) or the area around an existing tourism hub (such as Kilkenny). Increased visitor numbers should help to make these routes profitable and sustainable.
- 2) Promote scheduled services to tourists as day-trip and short break products. In support of greater regional spread and a more immersive consumer experience, longer distance bus operators could be encouraged to adapt and promote existing services in rural locations as day-trip and short break experiences, as well as working with rural accommodation providers to encourage non-car tourism in rural locations.
- 3) Improve promotion of scheduled services to visitors. Transport operators could be supported in developing their tourism promotion in order to more overtly target tourists both directly, through their own promotional efforts (e.g. obvious links on home pages and main language translations), and through travel trade intermediaries.

"It is suggested that information is the key factor in encouraging modal shift. Educational programs and campaigns promoting public transport should highlight the positive aspects of alternative modes. After that, it is important to provide information on existing public transport systems so that people know that they could have the option to contribute to minimising environmental impacts³³."

³³ Local v. Visitor Use of Public Transport in Munich, Diem Trinh Thi Le

In addition, state tourism agencies can do more to promote public transport to overseas visitors as a viable alternative to car transport, by including relevant information and links on their websites and by ensuring existing tourist-focused public transport offerings and solutions are visible.

- 4) Promote scheduled services, individually and as part of a bundle, to key tourism segments. Following on from Recommendation 3 above, integrated tourism and transport bundles could be developed for specific visitor segments - particularly business travellers, and those visiting friends and family.
- 5) Develop a number of themed experiences, based on scheduled services, for visitors. In addition, a number of sample themed experiences and bundles could be developed by tourism industry and transport operators, either based on public transport as an experience in its own right or integrating it with other tourism elements. Public transport has the potential to be a tourism experience in its own right either through creative theming - as seen in the comparator review earlier - or due to the fact that it offers visitors the opportunity to mingle with locals.
- 6) Improve the consistency in the use of online and mobile technology for ticketing. Operators have an opportunity to encourage greater tourist use of public transport by facilitating advance online and mobile ticket sales where they don't exist (e.g. rail visitor passes).
- 7) Agree and establish a form of regular measurement with regard to tourism and public transport in order to assist in the future planning of services and facilities. For national statistics, this could be done through one of the existing vehicles such as Fáilte Ireland's Survey of Overseas Travellers or through the NTA. However, each public transport providers needs to ensure measurement of tourism demand with regard to their own products and services (e.g. measuring demand and tourism web traffic) and to communicate relevant data to national planners. Progress needs to be measured on an annual basis.
- 8) Take account of the needs of tourists in public transport planning, especially in high-density tourism zones. It may be possible to do this as part of the county council's planning process via the TCUs.

5. APPENDICES

Appendix 1:

Bus Éireann's Wild Atlantic Way Guide

A1. BUS ÉIREANN'S WILD ATLANTIC WAY GUIDE

WILD ATLANTIC WAY

Bus Éireann Expressway Routes

Donegal - Sligo	Route 64
Sligo - Galway	Route 64
Westport - Galway	Route 12
Galway - Limerick	Route 151
Limerick - Cork	Route 11
Cork - Tralee	Route 43
Limerick - Tralee	Route 13
Limerick - Killarney	Route 11

Hit the Open Road

Travel across Ireland's unforgettable scenery by coach and bus in comfort and ease with Bus Éireann's great value Open Road ticket.

Tickets start from €57.00 each for 5 days of unlimited travel out of 8 consecutive days across our nationwide network of services. You can extend your Open Road Hop on/Hop off Bus Pass by purchasing extra "stamps" that cost only €15.00 each per day. For full details and to buy your ticket visit www.buseireann.ie.

The Open Road pass is valid for travel on Bus Éireann's scheduled services in the Republic of Ireland including Expressway, community, local, city and town services.

Discover the Wild Atlantic Way with Bus Éireann

Take to the Open Road with Bus Éireann

OPEN ROAD

Hop on! Hop off! Open Road tickets only €57.00

What is the Wild Atlantic Way?

Travel with Bus Éireann on this epic journey of discovery along 2,500 km of Ireland's western seaboard... The Wild Atlantic Way... Ireland's first long distance driving route. Hop on and Hop off as you please when you purchase our great value "Open Road" ticket or purchase your own point to point tickets from www.buseireann.ie. Travel as often as you like when you like, creating your own itinerary and explore more and linger longer... the freedom and choice is yours when you travel with Bus Éireann... Let us take you away to the magical West Coast of Ireland.

Let us help you plan your land adventures. Please see www.buseireann.ie or contact our travel centres staff:

Donegal	074 9121330	Galway	091 562080
Spokane	074 9131008	Stoke	086 7164500
Sligo	071 9180866	Cork	021 4038188
Balkin	086 71860		

Thank you for travelling with Bus Éireann. Enjoy the Wild Atlantic Way!

Go Wild in the North West!

WHEN IN DONEGAL:

Take Local Bus Route 64 from Donegal outside The Abbey Hotel and travel along the coast towards Killybeggs, Ireland's largest fishing port. Hop off the bus at the village of Carris and take a 20 min walk towards, Lake. Advice you can begin the walk up to the top of Slieve Donard Sea Cliff. A popular Discovery Point along The Wild Atlantic Way known these cliffs are the highest sea cliffs in Europe, even higher than the Cliffs of Moher, is a must do walk!

Tip: Route 455 will continue after Carris towards Glenties in the Glenties region, a visit to The Glenties Folk Village is highly recommended, enjoy!

Route 480 or the Expressway Route 64 begins Donegal Town south towards Sligo. Hop off at any of the many, many lovely quiet towns and homes in Rock Island Ferry Harbour, you can see the statue with the town name, makes a great pic! Hop back on Route 64 or Route 480 and 5 miles later you will arrive at the next stop which is the beautiful seaside resort of Bellefleur, take a walk around the beach if you wish to relax or "shop" and enjoy beach taking views of the Atlantic or take a car lesson, you never know if you try!

Head towards the Waves.....

WHEN IN SLIGO:

Hop on the Expressway Route 64 or Local Route 480 and head south towards the village of Carris, hop off here and walk down to one of the Wild Atlantic Way Discovery points. Making boats, see the Atlantic Sea in all its glory as you walk across Mullaghmore Head, truly breathtaking!

Departing Carris, travel north towards Sligo and enjoy panoramic views of Ben Bulbin, a mountain to your left, on your hop off in Carris, if you wish to see the beautiful spot of the famous Iron Point 900 feet, also see the scenic Ben Bulbin. From Sligo travel on Route 472 towards the very cute seaside resort of Stranishly, it's only a 15 min journey from Sligo, enjoy those panoramic views, more sailing and great home baking in "The Café". Route 473 from Sligo will take you to the coastal village of Rosnac Point, another 15 min journey.

WHEN IN MAYO:

Travel on Route 458 along the coast from Sligo and hop off at a choice of beaches, Enniscrone or Ballyvaughan and drive locally in Belleek. From Belleek hop on local bus Route 446 to Blackhead, or Route 445 to Belleek or travel to the popular tourist town of Westport on Route 448 or Expressway Route 52 on to Galway from Westport. Route 490 will bring you to another Discovery Point of The Wild Atlantic Way which is the wonderful beach of Ream Strand an island's best kept secret of Achill during the summer months in Westport why not take a cycle along The Greenway.

Experience Sea, Sky and Space

WHEN IN KERRY:

Depart Limerick on our Expressway Route 11 towards the town of Tralee, but do hop off in Adare. Enjoy the beautiful views of Adare which is often referred to as "Ireland's Perfect Village". From Tralee hop on local bus Route 271 and head for the town of your life in Douglas where in Douglas travel around the Sea Head Peninsula on Route 276 or hire a bike. Enjoy wonderful views of Adare Sound another Discovery Point of The Wild Atlantic Way or even take a boat out to sea! A must do is to take a boat trip from Douglas round the north side Douglas's new pier "Dolphin Pier", or hop on our Expressway Route 14 from Limerick and travel to the world famous town of Killarney, head on local Route 279 from here along the coast to Malinbeg, where Charlie Chaplin once holidayed and the famous King of Kerry.

Go on... Head into the South West

WHEN IN CORK:

From Limerick travel on our Expressway Route 11 to Cork or on Kerry Post and travel over from Tralee on our Expressway Route 49 to Cork. Head for West Cork on our Local Route 228 to the coastal town of Carrigrohane, a popular fish farm location due to its spectacular scenery or Local Route 237 towards the coastal village of Schull and Galley but do hop off in Travers square town of Comiskey on the way and sample the world famous "Clashilly Black Pudding". From Cork take Local Route 226 to another Wild Atlantic Way Discovery Point The Old Head of Kinsale. Kinsale has been listed as The Gem of the South, Ireland, with its historic Chatham Fort and many bars and seafood restaurants. Take local Route 255 from Cork and travel through Kinsale, Skibbereen, Glengarriff and Funchale along the southern coast.

Thank you for choosing to see The Wild Atlantic Way with Bus Éireann

Bus Éireann
www.buseireann.ie



Take to the Open Road with Bus Éireann

Recommended Discovery Points of the Wild Atlantic Way

Slieve League Sea Cliffs Route 490

Slieve League doesn't get much better than this! The Slieve League Cliffs are Ireland's highest sea cliffs and, at 600m (1968 feet), tall as nothing else on the island. The Slieve League Cliffs are a natural wonder and a must-see for anyone visiting the island. Located in the heart of the Wild Atlantic Way, the Slieve League Cliffs are a natural wonder and a must-see for anyone visiting the island.



Mullaghmore Route 64/480

Mullaghmore Head is a peninsula in County Donegal, Ireland. It is the northernmost point of the island of Ireland. The head is a natural wonder and a must-see for anyone visiting the island. Located in the heart of the Wild Atlantic Way, Mullaghmore Head is a natural wonder and a must-see for anyone visiting the island.



Downpatrick Head Route 445

Downpatrick Head is a peninsula in County Donegal, Ireland. It is the northernmost point of the island of Ireland. The head is a natural wonder and a must-see for anyone visiting the island. Located in the heart of the Wild Atlantic Way, Downpatrick Head is a natural wonder and a must-see for anyone visiting the island.



Keem Strand Route 440

Keem Strand is a beach in County Donegal, Ireland. It is one of the most beautiful beaches in the world. The beach is a natural wonder and a must-see for anyone visiting the island. Located in the heart of the Wild Atlantic Way, Keem Strand is a natural wonder and a must-see for anyone visiting the island.



Cliffs of Moher Route 350

The Cliffs of Moher are a natural wonder and a must-see for anyone visiting the island. Located in the heart of the Wild Atlantic Way, the Cliffs of Moher are a natural wonder and a must-see for anyone visiting the island.



Blasket Sound Route 276

Blasket Sound is a natural wonder and a must-see for anyone visiting the island. Located in the heart of the Wild Atlantic Way, Blasket Sound is a natural wonder and a must-see for anyone visiting the island.



Old Head of Kinsale Route 249

Old Head of Kinsale is a natural wonder and a must-see for anyone visiting the island. Located in the heart of the Wild Atlantic Way, Old Head of Kinsale is a natural wonder and a must-see for anyone visiting the island.



Let us help you plan your bus trail adventure!!!

Best Reasons to travel with Bus Éireann

- ✓ We are the only Irish bus company that offer you a nationwide network of bus services across Ireland
- ✓ Our great value hop on/hop off "Open Road" bus ticket will allow you unlimited travel on all our Expressway, Rural and City bus services
- ✓ You create your own travel itinerary to suit your needs: travel when you want to go, where you want to go and stay longer if you prefer... the choice is yours!
- ✓ Enjoy the panoramic views of The Wild Atlantic Way while you sit back and relax on board our services

Appendix 2:

Irish Rail's Trips by Rail Guide

A2. IRISH RAIL'S TRIPS BY RAIL GUIDE

Introduction

Welcome to Iarnród Éireann Irish Rail's guide to some fun days out around the island of Ireland which are easily accessible by train. From the mountains and lakes of Killarney in Co. Kerry to the rugged coastline of Galway Bay. Visit the Titanic's last port of call at Cobh, County Cork or stroll through historic Kilkenny (the Marble City).

With free wifi on all our services, modern new trains and no traffic jams to worry about, just sit back and relax in hassle free comfort



Dublin 5 - 8	Galway 18-20
Kildare 9	Athlone 21
Wicklow 11	Westport 22
Wexford 10	Claremorris 23
Kilkenny 11	Castlebar 23
Waterford 11-12	Sligo 24
Cork 13-14	Belfast 25-26
Kerry 15	Dundalk 27
Limerick 16-17	Drogheda 28

We've teamed up with a number of attractions to offer exclusive discounts for our customers.

Just complete the vouchers on the back page and present them with your train ticket to enjoy great value days out by rail for even less!!!

Images Courtesy of Tourism Ireland

Trekker & Explorer Passes

Whether you travel alone or with friends and family you will find that value for money train tickets are available right across our rail network.

Our cheapest tickets are normally available to book online at www.irishrail.ie but if you are looking for more flexibility we have a number of open and rambler type tickets that should suit your itinerary



Get the Freedom of Ireland with Trekker Tickets 4 days of unlimited rail travel for €110

The four day Trekker ticket costs just €110 and is valid for unlimited Intercity DART and Commuter rail travel on the Iarnród Éireann network. The ticket is valid for four consecutive days from the first date of travel. The Trekker Ticket is available from local Iarnród Éireann Irish Rail ticket offices.

Information and train times are available on lo-call 1850 366222, in your local station or just log-on to www.irishrail.ie

1

<h2>Wicklow</h2>  <h3>Avoca Walking Tours App</h3> <p>Experience and enjoy the beauty of County Wicklow by downloading the Avoca Tours mobile app. Once downloaded onto your smartphone you will have hours of audio, offline maps and GPS tracking directing you to hundreds of places of interest in the Garden of Ireland. The app is fully functional offline and requires no cellular data (no data roaming charges). The Avoca Tours App, in partnership with Iarnród Éireann Irish Rail is only 89c.</p>  <div style="border: 1px solid black; padding: 5px; display: inline-block;"> <p>PURCHASE THE APP FROM THE ITUNES STORE FOR JUST 89c</p> </div> <p><small>*NORMAL RETAIL PRICE IS €2.69</small></p>	<h2>Kilkenny</h2>  <h3>Kilkenny Castle</h3>  <p>Kilkenny Castle stands dramatically on a strategic height that commands a crossing on the River Nore and dominates the 'High Town' of Kilkenny City. The original Anglo-Norman stone castle was built during the first decade of the 13th Century and later became the principal Irish residence of the powerful Butler family for almost 600 years. It was presented to the people of Kilkenny for a token of £50 in 1967.</p> <p>W: www.kilkennycastle.ie T: 056 7704100 Station: Kilkenny (15 mins walk)</p>
<h2>Wexford</h2>  <h3>Irish National Heritage Park, Ferrycarrig</h3>  <p>Enter a special place, where Ireland's heritage comes alive with sights and sounds that shaped a country and helped to shape the world. A visit to the Irish National Heritage Park is like no other you can imagine. Surprises wait around every turn as you explore 35 acres of this remarkable heritage trail.</p> <p>W: www.inhp.com T: 053 9120733 Station: Wexford (c3 miles from station)</p>	<h2>Waterford</h2>  <h3>Medieval Museum</h3>  <p>The only museum in Europe built on National monuments, the 13th century Choristers' Hall and the 15th century Mayor's Wine Vault. Don't miss the unique Cloth of Gold vestments which were lost for hundreds of years after they were hidden from Cromwell's army, the Great Charter Roll which was viewed by Queen Elizabeth II on her visit to Ireland and the only piece of clothing to survive King Henry VIII's reign, 'The Cap of Maintenance'.</p> <div style="border: 1px solid black; padding: 5px; display: inline-block;"> <p>25% OFF</p> </div> <p>W: www.waterfordtreasures.com T: 051 304500 Station: Waterford</p>

10

Please check directly with attractions for details of opening times as advance booking may be required

11

Please check directly with attractions for details of opening times as advance booking may be required

Appendix 3:

Tourism and Public Transport – Best Practice Toolkit, Madeira

A3. TOURISM AND PUBLIC TRANSPORT – BEST PRACTICE TOOLKIT

Tourism and public transport

Best practice toolkit in Madeira



CIVITAS FORUM 2013

2nd October

Brest, France

Claudio Mantero and André Freitas, Horários do Funchal



MADEIRA

Our profile (1/2)



Horários do Funchal is a PT Operator in Madeira

- We transport 22,2 million pax year in Funchal
- We transport additional 1,5 million pax year in the interurban service
- Furthermore, we provide tourism rental service




Modal share in Funchal

- Car: 49%
- Public Transport: 34%
- Moped, bicycle, walk: 17%



Our profile (2/2)



We are very active in urban mobility initiatives, in a wide range of different European, National and worldwide projects within the DGTREN, INTERREG, Intelligent Energy Europe, and ERDF.


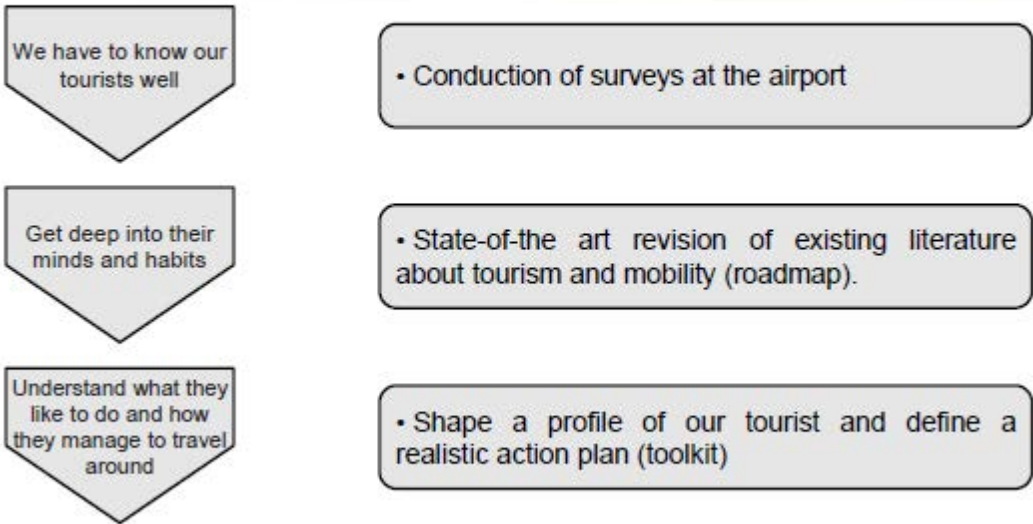
- Public transport can play a role in reinforcing Europe as the World leading region with regard to tourism. We need a new and focused approach to tourism
- Madeira is working on the building blocks of CIVITAS to bring tourism mobility issues onto the top of the political and public agenda.



▶ Madeira Island and the city of Funchal

Small text describing the project in Madeira, including details about the CIVITAS initiative and the role of public transport in tourism.

How we became a best-practice?

Conduction of survey targeting tourists



SEEMORE stands for Sustainable and Energy Efficient Mobility Options in Tourist Regions in Europe

- There is no need to conduct large and resource-consuming surveys. A sample of 200 can be reasonable for a medium-sized city.
- From the results of the survey, one can shape the tourist profile and prepare.
- For example, due to increasing use of mobile devices during holidays, one can sketch high strategic trends, such as:
 - **Technology will enhance travel by layering information about history and culture over physical locations, enriching the subjective experience of travel.**



5



State-of-the-art



A study from Amadeus, a world leading technological company, highlights the gaps between expectations and reality that tourists often come across

From chaos to collaboration

How emerging technologies will assist in a new era in travel?

The future of travel is likely to be shaped by tech solutions and social media actions to reduce stress, increase joy and to encourage collaboration among travellers and with travel providers. Click below to share the frustration and desire you agree with!


TRAVELLERS' FRUSTRATIONS	TRAVELLERS' EXPECTATIONS
<p>All the same, wherever, I travel 47%</p> <p>going through security, passport control and customs 47%</p>	<p>Automated identity 53%</p> <p>management systems to track flows of people going through security and border control</p>
<p>Looking for the best deal 51%</p> <p>not being able to find the best deal 51%</p>	<p>Intelligent tickets 82%</p> <p>can guide the traveller through the complex and changing rules of travel and ticket purchase</p>
<p>Having to wait 47%</p> <p>time to research options 47%</p>	<p>Intelligent recommendations 86%</p> <p>to provide more personal information for efficient travel</p>
<p>Not knowing where the best local services, taxis and services are 51%</p>	<p>Augmented reality 61%</p> <p>to provide more personal information for efficient travel</p>
<p>Not having good quality advice 47%</p>	<p>Payment with memory 47%</p> <p>to provide more personal information for efficient travel</p>
<p>Not being able to carry more, clothes and bags 51%</p>	<p>Cloud computing 59%</p> <p>to provide more personal information for efficient travel</p>

Reduction of tourist anxiety with regard to transport options

6



EU response to key challenges ahead - SEEMORE





SEEMORE stands for Sustainable and Energy Efficient Mobility Options in Tourist Regions in Europe

- SEEMORE aims to an increased co-operation between tourism and mobility sectors in order to intensify use of sustainable transport modes
- The project runs from April 2012 till April 2015

Partners

- CINISI Transport Consultancy *Spain*
- Mallorca Transport Consortium *Spain*
- Trivector Traffic AB *Sweden*
- Association of Local Authorities Pyrenees *Sweden*
- FGM-AMOR Austrian Mobility Research *Austria*
- Common Europe Persepolis Association *France*
- Municipality of Chacabuco *France*
- Club Sustainable Development of Civil Society *Spain*
- Province of Fari-Gasima *Italy*
- Central European Initiative *Italy*
- Lisnasel Tourism Development and Promotion Co Ltd *Ireland*
- Strategem Energy Ltd *Cyprus*
- Município do Funchal Public Transport *Portugal*
- Local Councils' Association *Malta*





CIVITAS | CIVITAS FORUM • 2nd of October • Brest • Claudio Mantero and André Freitas

THE CIVITAS INITIATIVE IS CO-FINANCED BY THE EUROPEAN UNION

Understanding tourist needs and tourist experience



Key principles:

- to offer personalized customized service to boost visitor experiences

SEEMORE in Madeira is focused on small actions that can generate a new mind-set among tourists and among the regional tourism industry alike

- The driving concept is to address each of the four main areas of the tourism experience flow an integrate and well-balanced package
 - **Consult** Tourists prepare their trips in advanced and consult mostly the Internet to seek for information about the destination they want to visit. During their visit, tourists often use gadgets and paper docs. to be kept informed about attractions and events
 - **Arrival** Some tourists only decide their travel options when they get to the airport. We need to offer them sound and effective solutions
 - **Activity** This is the cornerstone of transport solutions. Arrangements have to be taken so than sustainable mobility is the "natural" solution that visitors choose either to relax, eat or tour
 - **Departure** Why not give tourists a final souvenir of their stay, and reward those who have use





CIVITAS | CIVITAS FORUM • 2nd of October • Brest • Claudio Mantero and André Freitas

THE CIVITAS INITIATIVE IS CO-FINANCED BY THE EUROPEAN UNION

Understanding tourists and tourism flow

During recent years we have developed expertise and we now know tourism trends well. This step is essential to identify gaps and problems where we can step in and implement specific solutions

Consultation before (left side of diagram)

Share opinions (right side of diagram)

ARRIVAL | **CONSULT** | **ACTIVITY** | **DEPARTURE**

CIVITAS | CIVITAS FORUM • 2nd of October • Brest • Claudio Mantero and André Freitas

THE CIVITAS INITIATIVE IS CO-FINANCED BY THE EUROPEAN UNION

Consultation in advanced

Whether a tourist is visiting the website/facebook of the PT operator, the Municipality, or the Region official website, they will be forwarded to the travel planner

Municipality of Funchal

Paris authority

Official regional facebook account

OUR JOURNEY PLANNER


BE PRESENT EVERYWHERE YOU CAN, MANY TIMES IT'S FOR FREE!

All the main web portals readdress flow towards our Travel Planner, developed by CIVITAS and extended during SEEMORE

10

THE CIVITAS INITIATIVE IS CO-FINANCED BY THE EUROPEAN UNION


Consultation in advanced



Give more information to tourist about mobility habits in Madeira Support Support actively sustainable mobility attitude in local Tourism industry


Emission Tool Calculator

- All 8 SEEMORE Regions are undertaking a common approach to design an emission tool calculator.
- A tool for tourists to collect information about their "environmental footprint" during their holidays.




Certification policy of good practice

- In Madeira exists a label which recognize excellent mobility solutions provided by the hotels. (like PT information at reception, bikes for guests...)
- Mobility-wise, Tourists perceived positively hotels that distinguish themselves by excellent customer service with regard to transportation.




CIVITAS | CIVITAS FORUM • 2nd of October • Brest • Claudio Mantero and André Freitas



THE CIVITAS INITIATIVE IS CO-FINANCED BY THE EUROPEAN UNION


Arrival



Thanks to cooperation between tourism and mobility actors, tourists will come across with targeted campaigns either during their flight or when arriving at the airport


Easy access to Public transport service and information

- Aerobus tariff integration with the urban PT Operator. This scheme will make PT more appealing and easy to use.
- AIRPORT billboard with special approach to tourists
- Public transport information provided in official tourism information point.




Commercial protocols with airline companies

- Arrangements are being set up to promote sustainable transport options with several airline companies (TAP, EasyJet, TUI, Ryanair).
- Collaboration with high level international and cross border transport and tourism actors will rely, for example, on news-items to be published in magazines available on-board.



12


CIVITAS | CIVITAS FORUM • 2nd of October • Brest • Claudio Mantero and André Freitas



THE CIVITAS INITIATIVE IS CO-FINANCED BY THE EUROPEAN UNION


Consultation on-site

Develop a tailored information about public transport, that can strengthen the role of this energy-efficient mode of transport and make information about it as competitive as the one available for cars and chartered buses





Mobile access to the PT Operator website

- Madeira has made progress in offering tourists and locals alike the chance to organize their trip with ease and directly in their mobile phone



Mobile APP to offer static and dynamic information about service

- Promotion of Android app. jointly developed by a local company and University with schedules and real time info.

13

CIVITAS | CIVITAS FORUM • 2nd of October • Brest • Claudio Mantero and André Freitas

THE CIVITAS INITIATIVE IS CO-FINANCED BY THE EUROPEAN UNION

Activity

Relax – the decision-making process of tourists is becoming greener



For travellers that like a bit adrenaline, interurban PT is carrying bicycles

- To take advantage of the world-recognizable features of Madeira landscape, many tourists like to descend the cliffs by bicycle. For this niche, we now offer the chance to carry bicycles in interurban busses. This action is up-scaled from the CIVITAS Bus&Bike measure that was deployed in urban ground.



Events calendar

- Thanks to large stakeholder commitment, it was possible to define a calendar of regional events and a set of communication channels to promote the use of soft modes for tourists wishing to attend the festivities. Curbing the circulation of pollutant private transport modes nearby the place where the festivities take place is a supportive action taken by Funchal partners.



15

CIVITAS | CIVITAS FORUM • 2nd of October • Brest • Claudio Mantero and André Freitas

THE CIVITAS INITIATIVE IS CO-FINANCED BY THE EUROPEAN UNION

Activity



New PT routes to tourist destinations and sustainable mobility options during big events

- Often, PT is organized for locals and not for visitors. Therefore, Madeira is currently fitting the network to tourism needs. That is to say, to reinforce PT supply or to redesign the PT routes that connect to core tourism hallmarks, attractions but also major sought-after events that are now more accessible for visitors to attend (either in terms of information availability and provision of transportation).



16

Consultation on-site



Contact Tourism industry actors to promote a new common approach to tourist mobility. All actors act with the same aim to inform about mobility options in all channels, such information points, receptions, local shops...

Training for tourism professionals about PT service

- Hotel receptionists and PT ticket sellers are being subject to specific training about the PT fare menu, new information devices and services.
- Service skills are expected to increase and tourists are likely to become more satisfied with their travel experience.
- Our main task is to provide all people who contact with tourist with good information about PT solutions



Viral videos

- We have produced the Seemore corporate video that can already be found on *You Tube*.
- We are also producing a fresh and attractive regional video to be disseminated at fairs, conferences, Hotel video circuits and main entrance gateways (airport and port)



14

THE TOOLKIT!

How to promote KNOWLEDGE and USAGE of LOCAL sustainable mobility options to tourists?

- TO CONSULT AT HOME
MAKE YOU VISIBLE IN ALL COMMON INSTITUTIONAL PLATFORMS
- AT THE DESTINATION
MEET TOURIST PROFESSIONALS AND FIND COMMON GOALS TO SATISFY/SURPRISE TOURISTS WITH COMMON ACTIONS
- TECHNOLOGICAL ENHANCEMENT
USE YOUR DATA TO MAKE SOMETHING USEFUL FOR PEOPLE (MOBILE APPS)
- TRIGGER ENTHUSIASM
MAKE PERIODIC CONTESTS TO PROMOTE YOUR SERVICE IN SOCIAL NETWORKS (Such as a Photo contest)
- WORK SIDE BY SIDE WITH STAKEHOLDERS
EVENTS AND FESTIVALS TRANSFORM THE SETTING OF HOW WE SELL TRANSPORT SOLUTIONS
- APPROACH TOURISTS FROM THE FIRST PHYSICAL CONTACT IN AIRPORT OR OTHER MAIN CITY ENTRANCES
- CURB TOURIST STRESS AND UNCERTAINTY

CIVITAS | CIVITAS FORUM • 2nd of October • Brest • Claudio Mantero and André Freitas

THE CIVITAS INITIATIVE IS CO-FINANCED BY THE EUROPEAN UNION

21

Thank you!

Claudio Mantero and André Freitas

Contact Details
Horários do Funchal
Fundoa de Baixo
gep@horariosdofunchal.pt
<http://www.civitas.eu>

CIVITAS | CIVITAS FORUM • 2nd of October • Brest • Claudio Mantero and André Freitas

THE EUROPEAN UNION



LUAS - St. Stephen's Green



Irish Tourist Industry Confederation

Ground Floor
Unit 5, Sandyford Office Park
Dublin 18, Ireland

Tel: +353 1 293 4950
Fax: +353 1 293 4991
Email: itic@eircom.net
www.itic.ie