BUS SERVICES IN RURAL VISITOR DESTINATIONS: WHAT WORKS?

Alistair Kirkbride & Martin Higgitt

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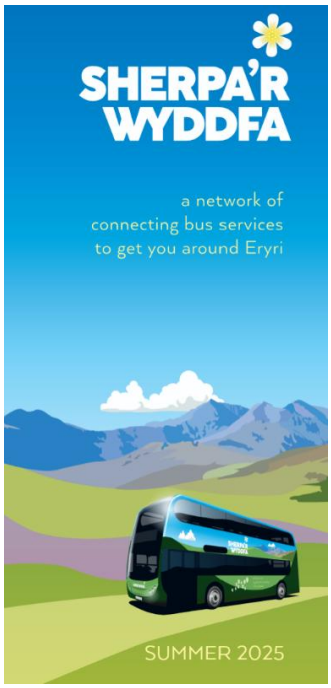

"The view from the bus is exceptional, and not without thrills, with sheer drops on both sides of the road"

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Bus services in rural visitor destinations: What works?

Table of Contents

This study was led by Alistair Kirkbride at Low Carbon Destinations CIC and Martin Higgitt at Martin Higgitt Associates in 2025.

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Summary

Bus services can be a core part of the visitor landscape of many rural destinations; there is real affection for many open-top services and long-established "ramblers", and many services open up experiences such as 1-way walks and stress-free experiences. So how come up to 90% of journeys in these places are – stubbornly - still made by car, resulting in seasonal congestion and limited access for those without access to a car?

This study aimed to set out broadly what the rural visitor bus sub-sector looks like. It describes the scale and variety of services in rural areas across the UK that serve visitor markets, sets out the nature of their benefits and identifies what might need to happen to maximise their benefits.

It found

- ✓ At least 248 services
- ✓ 7 broad characteristics
  that are useful to describe and understand the different types; we present 11 case studies to illustrate these.
- ✓ A lack of coherence as a sector
  with a wide variety of types of organisations involved for different reasons, linked by a common aim of providing visitor access to rural destinations, but very little communication across areas or service types.
- ✓ A high qualitative awareness of benefits of visitor bus services
  but very little formal evidence.
- ✓ A sector that is generally highly seasonal
  leading to access issues (for visitors and residents) out of the busy seasons – often 2/3 of the year.
- ✓ A sector that is either mainly commercial and stable or grant-dependent and fairly unstable year-to-year
- ✓ A wide variety of ways that services are presented to the public
- ✓ A spectrum of services from resident-focussed services that are sometimes used by visitors to visitor-focussed services sometimes used by residents
- ✓ Significant opportunities for services to learn from one another
- ✓ Some stunning under-the-radar nuggets of good practice – from Ullswater visitor businesses under-writing visitor bus services expansion or the Trossachs Explorer approach to action-research-led development.

Looking across the 248 services - and engaging with 11 services via the case studies - leads to the following areas of recommendation:

1. Learning from best practice in service delivery
   Those involved with the development, operation and marketing of services can learn from looking across other services that might be similar or very different.
   We set out these lessons in a way that might help translate them across the variety of service types.

2. Public sector bodies to better appreciate the scale, nature of benefits and current & potential scale of impacts – and support the sector accordingly.
   Bus services that focus on visitors are generally seen as not in the aegis of public sector transport bodies (from local to national scale). However, their ability to deliver on the public sector priorities of emissions reduction, congestion management, health & wellbeing and accessibility & equity means that the role of the public sector needs reconsidering.

This means:

1. Local Transport Authorities
   - ✓ recognising the nature, scale *and potential scale* of the benefits of visitor bus services against their priorities through policy and funding decisions
   - ✓ pro-actively supporting organisations & partnerships involved with rural visitor bus service design and delivery
   - ✓ being more confident in using their powers and abilities for managing locality or destination-wide visitor car access so that the benefits of bus access can be maximised

2. Regional transport bodies developing strategy & policy designed to maximise the benefits and impacts of rural visitor bus services.

3. National Transport bodies (Department for Transport, Transport Scotland, Transport for Wales):
   - ✓ acknowledge the scale, variety and value of rural visitor bus services, the alignment of their impacts with national priorities and recognise the scale of their potential
   - ✓ review bus funding formulae and ensure that the potential of rural visitor bus services is recognised and supported in policy and when funding streams are established
   - ✓ consider specific programmes to nurture and better understand the potential that could be delivered by the expansion and innovation in rural visitor bus services. We set out an idea for a demonstration programme: *The accessible rural visitor destination challenge*.

4. Identify an appropriate host for a centre of excellence for rural visitor bus services – to provide an enduring accessible repository for best practice, to lead to coherence and identity for the (sub)sector and therefore fuel the opportunities for maximising the benefits of rural visitor buses.

1. Introduction

The scale of visitor and leisure travel is not fully appreciated in the transport sector.

- Leisure travel (of all forms) represents 46.1 of all personal distance travelled by any mode in England and Wales (Figure 1). This rises to 63% of all personal miles *by car*.
- More people travel to the UK's 15 national parks and 46 national landscapes each year (260m, about 90% by car[34]) than pass through the UK's 144 airports (251m[1]).

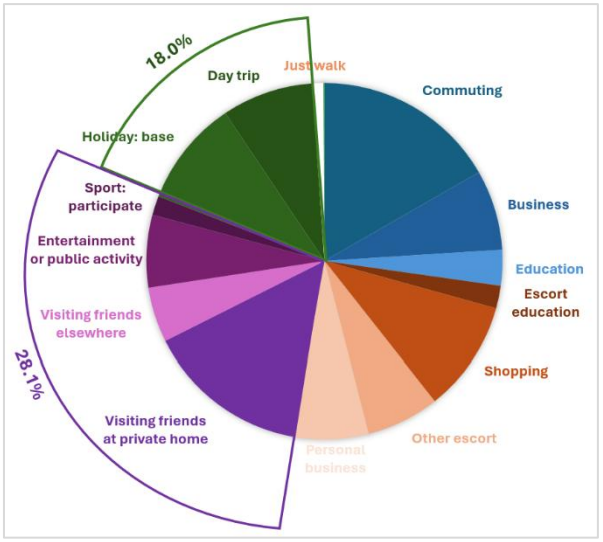


Figure 1: Personal miles travelled by purpose: 18% are for holidays or day trips, 28.1% for other leisure purposes. (National Travel Survey, 2024)

- Visitor travel can sometimes contribute to more than half of a popular rural visitor destination's total carbon emissions (Figures 2 & 3). This is mainly explained by the majority of journeys being made by car.

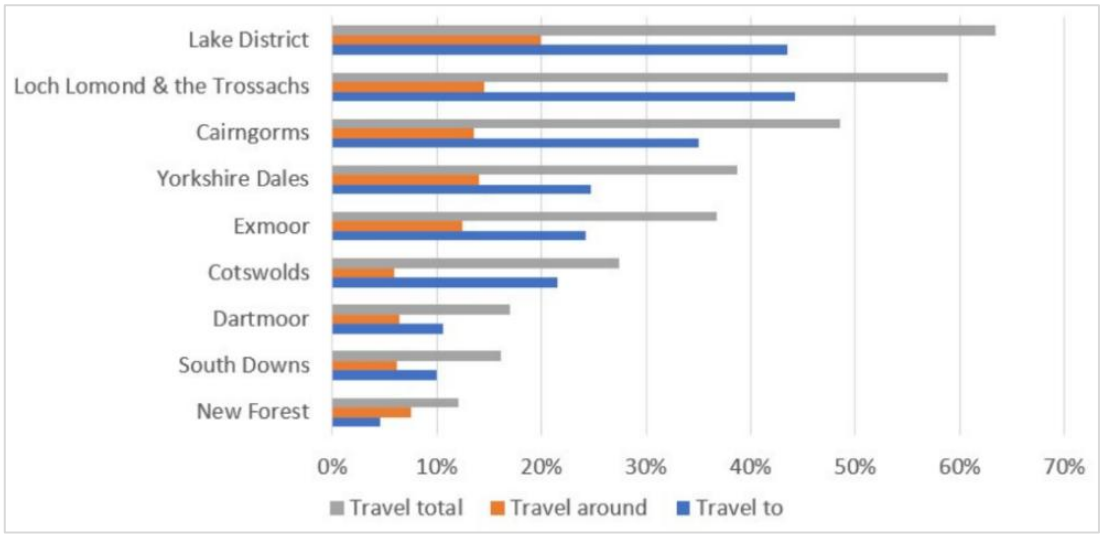


Figure 2: Travel as proportion of total CO_2 emissions of various UK national parks (based on SWC/NPP analysis, 2024)

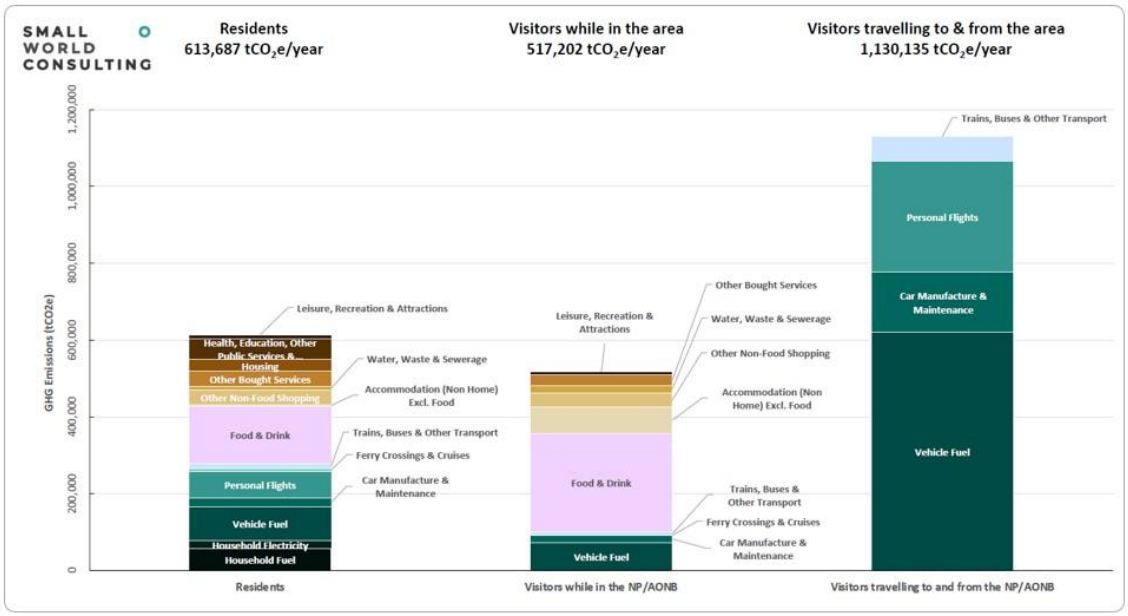
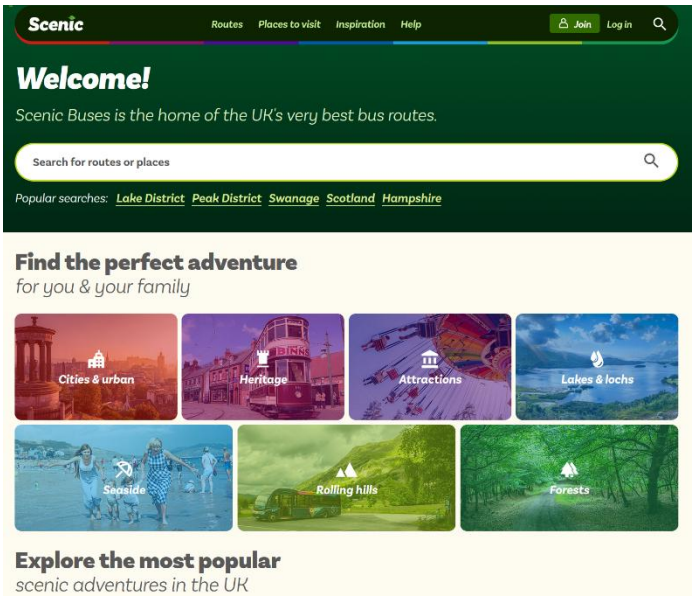
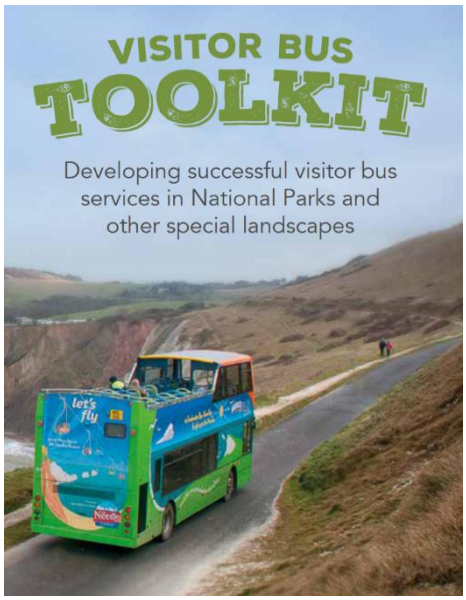


Figure 3: Contributions to the Lake District's CO2 emissions (Small World Consulting, 2024)

Visitor bus services have existed for decades in rural destinations. Some have become a part of a destination's visitor fabric – such as the New Forest Tour, the Lake District's Open-top Lakesider or the Shropshire Hills Shuttle. Others – while popular – are unstable and as such do not become woven into places in the same way.

The Scenic Buses website[2] is a comprehensive public-facing resource that showcases the best visitor bus services in the UK. The 2015 Visitor Bus Toolkit[3] remains a valuable practitioner resource that helps inform service development. In 2018, a Tripadvisor poll ranked the top 20 Most Scenic Bus Routes in Britain – the results are included here in Appendix 1.





So what works and why?

This study:

- ✓ Pulls together a compendium of bus services in rural areas where visitors are a key user group
- ✓ Identifies seven main types of service, then dives into each to understand more about how they function, how they came to be, what are the main benefits, what works well and what is a struggle (and why)
- ✓ Distils good practice so that it can be applied across services
- ✓ Makes recommendations that focus on maximising the benefits and stability of rural visitor bus services.

a. Some definitions: Rural? Visitors? Leisure?

In this work, we are deliberately fairly loose with definitions. We explore them a bit more here because it becomes important when trying to identify service types (Section 2b). The three main ideas are "rural", "visitors" and "leisure".

Rural

By rural, we mean places away from towns & cities where people go to for leisure, and as a result, the service relies to some extent on this demand. "Rural" might mean linking large metropolitan areas with nearby coasts, national parks or national landscapes, or it might be a place remote from any main town or city.

"Visitor" & "leisure"?

In terms of demand for bus services:

- *Visitors* are people away from home and so travelling away from their familiar day-to-day surroundings. In terms of their use of buses, it might be for leisure or it might be functional – to go food shopping whilst on holiday.
- *Leisure* travel means that people are travelling for pleasure rather than for function – they are on a day out of some sort rather than commuting, shopping etc. Leisure travel therefore can include residents in their local area as well as visitors to that area.

We use the term "visitor bus service" as a shorthand for bus services in rural areas that attract a significant number of visitors, acknowledging that these services are rarely (never?) used solely by visitors nor necessarily designed (only) for visitors.

b. Need & audiences

Whilst there is wide awareness of the existence of rural visitor bus services[2,3], they are not well understood in terms of how many services exist, the types of service, who is involved in delivering these different types of services and how, economic models and financing, and what good practice looks like across the full range of visitor bus service types. This work therefore complements the Visitor Buses Toolkit[3] in helping to guide the development of services.

There are three main audiences for this work:

- People and organisations who are either considering establishing a service or are currently involved in managing a service
- Organisations who have a vested interest in understanding better the value, role and benefits of services in their area
- Public sector bodies organisations (national & local government) involved in policy & strategy development and decision-making over funding.

2. What services, where and what type?

So how many visitor bus services serve rural areas exist in the UK? Where are they?

a. List of visitor bus services

Working out an initial longlist of services was undertaken via:

- Online resources such as the Scenic Buses website[4]
- Scouring all websites of the UKs 15 national parks, and 38 national landscapes in England & Wales
- Asking for advice via networks and organisations including National Parks England[5] (transport officer's group), the National Landscapes Association[6], Good Journey[7], the National Trust and Forestry England
- Further snow-ball follow-ups and web searches.

Through this process, 248 services were identified.

A list of visitor bus services in rural UK is in Annexe 1.

b. Types or characteristics of visitor bus services

It is clear that there are different types of visitor bus services: commercial services such as the open topped New Forest Tour or Jurassic Coaster are very different to the smaller seasonal "Explorer" services such as that serving Wasdale in the Lake District.

7 broad characteristics were identified; some services were clearly a single characteristic or type of service, but most shared several characteristics[1]. The named case studies examples are set out in Appendix 2 and Annexe 2.

1 Branded visitor tour
36 services, 15%

Seasonal, branded, timetabled routes, often with dedicated buses, often open-topped or double-deckers. These are almost all commercial services led by operators with dedicated websites. Some include hop-on-hop-off tickets.

Examples include

- New Forest Tours
- Lakesider 599

[1] The number of services of each type is given and the percentage of all identified services. As some services can be categorised as more than one type, the percentages total more than 100.

2 "Rambler / Explorer" services

31 services, 13%

These are more explicitly visitor-focussed services that are themed somehow to an area. They are often (but not always)

- seasonal – or at least significantly enhanced during the peak visitor seasons
- named – such as the Wasdale Explorer
- routed along narrower roads rather than more significant corridors

Examples include Pembrokeshire Coastal Buses, Wasdale Explorer, Shropshire Hills Shuttle

3 Shuttle accessing specific place or attraction

22 services, 9%

This serves a specific demand – such as from a station or village/town to a nearby attraction which is otherwise poorly connected without a car. They may be free (such as the Blenheim shuttle) or priced as an attraction in itself (and not accepting ENCTs or the £3 fare, such as the Stonehenge Tour)

Examples include Blenheim shuttle, Stonehenge tour (Salisbury-Stonehenge)

4 Express bus/coach serving key visitor areas

15 services, 6%

This basically covers the Scottish Citylink network – core longer distance services used by visitors for access to rural destinations.


Citilink 916 with Cuillin ridge (Skye)

M10 Citilink service (Inverness to Glasgow) in Pitlochry

5 Corridor connecting hubs

196 services, 79%

This is probably what most people would recognise as a standard bus service – connecting towns and villages together along some form of corridor. Here, it meets a combination of visitor and resident demands, although often it would "feel" like a visitor-targeted service (perhaps branded) that residents also use.

Examples include the 555 Kendal-Ambleside-Grasmere-Keswick through the centre of the Lake District (see Case study, Annexe 2)

6 Urban-rural leisure connection

57 services, 23%

Some services link towns & cities with popular rural destination areas. These are often providing services for local residents at the same time as providing access to leisure destinations. As such, the buses are rarely branded.

Examples include

- several Dalesbus services (See case studies, Annexe 2)
- The South Downs Breeze buses from Brighton (& graphic (right))

7 Network

116 services, 47%

Services are an integral part of a local network – such as Dalesbus & Sherpa services (Annexe 2), or the Jurassic Coaster

c. Deeper dive…

In order to understand how each characteristic plays out on the ground, we identified a number of services and conducted in-depth interviews with key personnel involved in developing those services, and developed case studies from these (Appendix 2 & Annexe 2).

The main areas of questions we were asking about the services were:

1. Origins and development of the service, and how the service now operates
2. How the services "fit" locally; how are services are perceived by stakeholders, organisations and users?
3. Users & markets: who uses the services and for what purposes?
4. Benefits: what are the key benefits and who benefits from the service?
5. Marketing and promotion: approaches and successes
6. Aspirations and ambition: what are your ambitions for developing the service in the future? What challenges limit the success or expansion of the services?
7. Any other key points that the interviewee wished to raise.

We used an interview schedule where each question was introduced in a fairly open way inviting an unfettered response, then allowed us to drill down into specifics and test specific ideas with the respondent.

Broad questions – to illustrate the nature and scope – were pre-circulated to respondents, then they were invited either for a video conversation or to email back responses to the detailed questions.

The case studies were distilled to a broadly common format (Annexe 2).

3. Benefits of visitor bus services

It is notable that monitoring and evaluation of service benefits are uncommon and unsystematic, limiting the ability to set out clearly and robustly benefits of visitor bus services. We interpret this as being due to two main reasons: the services being

- commercial – resulting in resource being focussed on marketing to maximise ridership or
- grant-funded – leading to tight budgets often (but not always) not providing resource for monitoring and evaluation.

Most benefits summarised here are therefore qualitative, based on a combination of opinions given in the deeper dive case studies or via web materials for the services; for the latter, the meaning can only be interpreted as *intended* benefits – such as "go greener" marketing initiatives. The lack of more comprehensive monitoring - especially related to scale (e.g. ridership volumes compared to car volumes) – means it is not possible to set out formally the more specific impacts such as emissions reduction.

The main benefits relate to three broad areas: enabling car-free leisure access, supporting destination marketing, and supporting a stronger network of services that benefit both residents and visitors.

a. Enabling car-free leisure access

Whilst this clearly stands out as the stated main benefit, four distinct purposes lie beneath the headline:

i. "Landscape protection"

This is often stated, yet can mean different things including:

- Reduction in direct damage – such as verge damage and visual blight from car parking
  The Sherpa/Pen-y-Pass and Wasdale case studies are relevant here.
- Emissions reduction
  This is usually seen as implicit in the "go greener"-type marketing.
  We found no monitoring that evaluated emissions reduction explicitly of visitor bus services.

Many services exist in protected landscapes, so "landscape protection" is seen as implicit and "baked-in" to reasoning and impacts of visitor bus services. National Park Authorities (e.g. LDNPA for Wasdale) and National Landscape bodies (e.g. Shropshire Hills Shuttles) are key drivers of visitor bus services development and management, their motivation being aligned to the duties for landscape protection.

The beneficiaries are landscapes that suffer less negative impacts from visitor access, and the broader environment. As a result, organisations who have agency or responsibility over these benefit from visitor bus services.

ii. Traffic & congestion reduction

The emphasis on traffic reduction is related to:

- an acknowledgement that traffic levels are perceived as being too high for the locality (narrow roads, lack of parking capacity etc.)
- traffic levels – especially in busy visitor seasons - lead to congestion with longer and unreliable journey times
- road danger, and the associated issue that high traffic levels are a disincentive for people to use the roads for walking and cycling.

The beneficiaries are other road users. This might include people whose lives are otherwise blighted by:

- *unreliable journey times (residents, emergency services, scheduled public transport users & operators)*
- *road danger – pedestrians & cyclists, vulnerable road users; people wanting a leisurely experience*
- *visitor bodies who want to be able to include safe active travel as part of the destination's visitor proposition.*

iii. Equity & economics

Most of the case studies stated that enabling car-free access for the purposes of equity was important.

The direct beneficiaries include[2]*:*

- People who are not *able* to access a car due to various reasons such as income or health
- People who do not have a car, mainly out of choice
  This includes people who *can* drive, but either choose not to have a car at all or have decided to visit without their car. This includes a large proportion of overseas visitors. For instance, the Blenheim case study revealed that the ability to access the Palace via the shuttle from London & Oxford rail services was a key consideration in its establishment.
- People who *can't* drive
  This includes the increasing proportion of younger adults who are either choosing not to or cannot afford to learn to drive or own a car[8], leading to mobility lifestyles that are car-free. This significant and growing visitor market relies on other ways of accessing destinations. A failure to provide alternative ways of travelling around the destination will exclude or alienate this growing market.

These different cohorts have implications for how the services are designed & marketed. Most case studies interviewees acknowledged the general idea of the service providing access for those without a car, but not necessarily splitting this down into the wants & needs of the different cohorts.

iv. Freedom to choose

Several case study interviewees offered that a key user market were people who had a car freely available to them, but chose not to use it. This is mainly because they preferred not to have to drive[9].

To illustrate, the Ullswater case study identified two main "freedom to choose" cohorts:

- "Residents – especially retired people and people with wheelchairs - use the services mainly for an easy day out, some just riding the bus for a sightseeing journey."
- "… visitors in motorhomes and vehicles with roof tentboxes – so that they don't have to pack up to make a journey. As there are several large camping and caravan sites in the valley, this is a significant market.". This also has implications for traffic reduction.

[2] or *could* include (more) if the people were able to get to the destination (more easily) and knew about the option of a visitor bus service

Monitoring of the Wasdale Explorer revealed that 69% of respondents had a car available to them that day but chose to use the bus and 49% chose to use the bus because "it is less stressful".

The more overtly visitor-focussed services such as open-topped or seasonal shuttles (categories 4, 5 & 6) are *designed* to attract those with freedom to choose as part of the visitor proposition.

These beneficiaries are people wanting a relaxing leisure experience and the visitor businesses who benefit from being able to use this as a part of their marketing to attract visitors.

b. Destination marketing and visitor propositions

Visitor buses straddle the transport and tourism sectors. From the perspective of the tourism sector, they are a part of the visitor proposition alongside – to an extent – visitor attractions and experiences. The proposition is for a great experience – either:

- Provided by the service itself – such as open topped double-deckers or a tour through a landscape or
- Enabling other experiences – such as opportunities for one-way walks[10], or getting to difficult-to-access locations.

More generally, the ability for visitors to get around easily (i.e. beyond the specific service) was suggested by several interviewees as of value in terms of marketing the destination.

The beneficiaries are

- *The visitors themselves – they have a better experience because of the existence of the service*
- *Visitor businesses and organisations that rely directly or indirectly on tourism*

The origins and development of the SITU organisation in Ullswater and the services it supports is directly relevant here: a main motivation for the collaboration between – and investment by - visitor businesses in the valley was to develop and enhance the quality of the visitor proposition.

c. Mixing visitor & resident demands for mutual benefit

Many of the 248 services exist as standard bus services. Of these, many allow for use of ENCTs concessionary passes and are part of the £3 fare scheme in England. They also operate on routes that cater for the demands of both visitors & leisure use and residents. Combining visitor and resident demand leads to:

- better services – more frequent, operating earlier/later or all year rather than just in busier visitor seasons
- services that exist that wouldn't otherwise do so - such as the Blenheim Shuttle

The beneficiaries are therefore both residents and visitors.

4. Public, private and community sector: who does what well?

Why and how should the public sector support bus services in rural visitor areas?

Local Transport Authorities

Local Transport Authorities are involved in all bus services through their regulatory oversight role. For many – but not all – services, their roles might also involve funding – via Concessionary Travel reimbursements or other funding such as for socially necessary services and for other reasons via Bus Service Improvement Plan (BSIP) funding.

For services that have significant visitor or leisure use, the LTA's funding role

normally involves reimbursements to the operator for

- concessionary pass holders (if the service takes concessionary passes)
- the £3 fare scheme in England

might involve:

- Subsidising timetable extensions – for instance enabling services earlier/later to cater for hospitality & other employment or access to education
- Funding services where there is a clear problem – such as visitor car congestion that causes real access & safety problems (such as preventing access for emergency vehicles)[19].

These decisions are related both to the LTAs broader policy priorities and made on a case-by-case basis.

National Park Authorities and National Landscape bodies

Beyond LTAs, many National Park Authority and National Landscape teams take active roles in the delivery of visitor bus services, often involving grant-funding. Whilst they are not able to access Government bus funding, they take this role because it supports their priorities which might be different to those of the LTAs, or where the LTA needs or chooses to direct funds elsewhere in its (larger) area for these purposes:

- access for leisure – especially where routes are not commercial and/or there are significant visitor traffic-related problems
- landscape protection – tackling visitor car use, often as local packages of measures
- providing sustainable transport for emissions reduction
- social equity – to help deliver on purposes, duties and/or priorities to provide access to landscapes

This is illustrated well in the Sherpa, Wasdale Explorer and Shropshire Hills Shuttle case studies. These also illustrate that this more discretionary funding is often short term and a part of funding packages used to commission season-by-season services.

What could public sector bodies do better or differently?

This work has revealed five elements of a broader case for why it might be appropriate for LTAs to support bus services that serve visitors in rural areas:

1. Carbon
   Most LTAs have explicit policy or stated ambitions of carbon reduction[11],[12]. In many areas that attract significant visitor volumes[13], visitor travel is often a significant contributor to the scope 3 emissions[14] in an Authority's area[15], mainly due to private car use.
   It is therefore in the LTA's interest to support measure that shift journeys from car to deliver on its priorities for carbon reduction.
2. Health & wellbeing
   Most LTAs have policies to prioritise health & wellbeing of its resident populations. National Parks and National Landscapes were established partly to enable people to enjoy the landscape for – what we now term – health and wellbeing outcomes.
   A majority of visitors to most rural destinations are day visitors, a large proportion of which travel from within the LTA area. On average, 22% of households in the UK do not have access to a car[16], but this rises significantly for younger adults (c. 48% for adults under 29)[17] and in some areas (45% households in Glasgow)[18]
   This means that for an LTA to deliver on its health and wellbeing priorities, supporting bus services for visitor access should be a priority.
3. Safety and active travel
   One of the attractions of many rural visitor destinations are narrow roads. Due to the road's limited capacity, they become clogged by excessive volumes of visitor traffic in busy periods, leading to:
   - Difficulties for emergency services to access the area – especially at times when they are busiest and therefore likely for there to be more demand[19]
   - Putting people off walking and cycling[20], although funding for tackling this is seen by many as being stacked against rural areas[21]
   - Severance – the fear and danger of crossing busy roads[22]

   These become problems that fall at least partly within the remit of LTAs.

   Supporting bus services is a key way of reducing car traffic – especially as part of place-based demand management – over which LTAs have primary responsibility.

4. Socio-economic / equity
   A key responsibility of an LTAs is to provide equitable access. Recent work has exposed the extent of Transport Related Social Exclusion (TRSE) such as in the north of England[23] and the Transport East region[24].
   The main solution to TRSE in these studies is better public transport.

Some of the case study interviewees – mainly of commercial services - stated that they would like to see public sector bodies use their powers and abilities to develop and implement area-wide traffic management, both to manage congestion and hence deliver more reliable journey times (for bus and necessary car users), but also to help drive demand onto bus services; this would enable better service levels and more service viability potentially leading to significantly less need for public sector spend. Together, this would mean that the roles of the public sector and operators become more clearly defined – the public sector managing demand, the operators taking service risk and reward.

This could apply to areas where bus services are far from commercial; Pen-y-Pass is a good example where a combination of visitor car parking "restrictions" near to a destination's popular area – which actually just means enforcement of existing legal and safe car parking – was coupled with better bus services linked to a park & ride with clear communications. Whilst the bus services still need some public support, it is significantly less than it was, the ridership has markedly increased and the new system is popular with visitors.

Franchising

We tested awareness, opinions and appetites for possible franchising with our case study interviewees. It was notable that there was general awareness of the emergence of possible franchising in England, but understanding of the implications was mainly determined by type of service:

- for smaller, local services such as the *Explorer* / *Rambler*-type services, there was little understanding or consideration of whether or how this might be relevant.
- for larger scale more stable commercial services – such as branded open-topped services - franchising was seen as at best irrelevant and at worst a threat.
- for those involved in services that catered to a more balanced mixture of resident and visitor markets, there was a mixed picture on possible franchising – probably more related to the relationship with and franchising attitudes of their Local Transport Authority.

Whether there a model of franchising that would deliver further benefits for and from visitor-focussed bus services is not currently known, and this work has not identified any substantive ideas about possible models.

What does the private sector do best?

Interviewees that were operators all said that they understood best how to design and deliver bus services. This was demonstrated to be true with the branded fleets such as Lakes Connection (Annexe 2), New Forest Tour or Jurassic Coaster in terms of operating start-of-the-art vehicles with consistent attractive branding across multiple channels that target visitors to provide great experiences. In some ways, the business models are more akin to visitor attractions rather than transport services.

How far do these skills and abilities translate away from the overtly commercial visitor service types?

In the Ullswater valley (Annexe 2)

- the completely new UB1 service was designed by visitor *businesses* as they were well placed to understand where their visitors wanted to go from and to; whether this becomes commercially viable is – according to SITU – probably dependent on the ability to restrict visitor car traffic at peak times.
- SITU also initially subsidised the route variant of the commercial 509 service – to link to Lowther Castle and the popular village of Askham. After two years, ridership had built sufficiently for Stagecoach to take it on commercially.

A key to the success to the SITU supported routes is them being linked to local visitor-facing businesses. This means that those offering support have a vested interest in the service's success.

Together, these suggest that local visitor businesses are well placed to be part of the design and (perhaps) delivery of services, although that is not a norm at present. This happens significantly more routinely in European visitor destinations through different local governance[25].

What does the community sector do best?

In the case studies presented here, Wasdale is a good example of community-led development of a service that is both popular with visitors and helps to tackle long-standing visitor traffic & parking issues problems that affect the day-to-day lives of residents and compromise visitor experience. The partnership between the community, NPA, transport authority and operator creates something better than any could or would have been able to achieve alone.

The SITU group comprises visitor businesses and local community (mainly through parish councils). Together, these have led to new and enhanced visitor-focussed services that also work well for local residents. Once again, the local ownership is a key part of the value of the services and aligns well with the desire for authenticity by visitors[30].

Although not a case study, other communities are actively involved in design and development of access and transport, such as the Travelling Light initiative in the Hope Valley (Peak District), and their ongoing development of "Little Switzerland" transport system design[26]. More broadly, Scottish Community Tourism[27] is leading the way in community-led tourism, resembling more the approaches taken in Alpine visitor destinations that have world-class transport systems[28].

5. So what does good look like?

5.1 Key ideas

Whilst there are significant differences between the types and scale of visitor bus services identified here, the following emerge as good practice:

a. Branding and identity

As many visitors are not regular bus users but open to using buses as a visitor, branded services help to raise awareness of the service and create a sense of the bus being an enabler of an experience – rather than just an alternative form of transport.

Branding might involve the service / network:

- having a name – such as Blenheim Shuttle or Wasdale Explorer. This helps provide a sense that it is part of the place as well as a headline description of the purpose or experience
- having some form of consistent design across the bus, flyers, website, bus stops etc. For instance, the Jurassic Coaster uses consistent branding across bus, bus stops, timetables, leaflets, posters & web. This raises the overall profile of the services during a visit and again makes it implicitly a part of an area's visitor proposition; it helps to put the option in front of the visitor rather than the visitor having to seek it out.

b. Targeted marketing

Marketing of services relates to

- messaging – how the proposition is being presented (Day out / Protect the environment / Give the driver/car a break etc.)
- method – leaflets, web etc.

The marketing for services we considered in this study was varied in terms of how they approached these. We didn't reveal any evidence that marketing had been tested on markets, nor that there was any formal approach to considering markets in detail. There was evidence in some case studies that the experience of those behind service delivery understood their markets well, so marketing was implicitly tied to this knowledge. One interviewee of a popular services implied that it would probably have been popular with very little marketing due to the demand that the service was established to cater for.

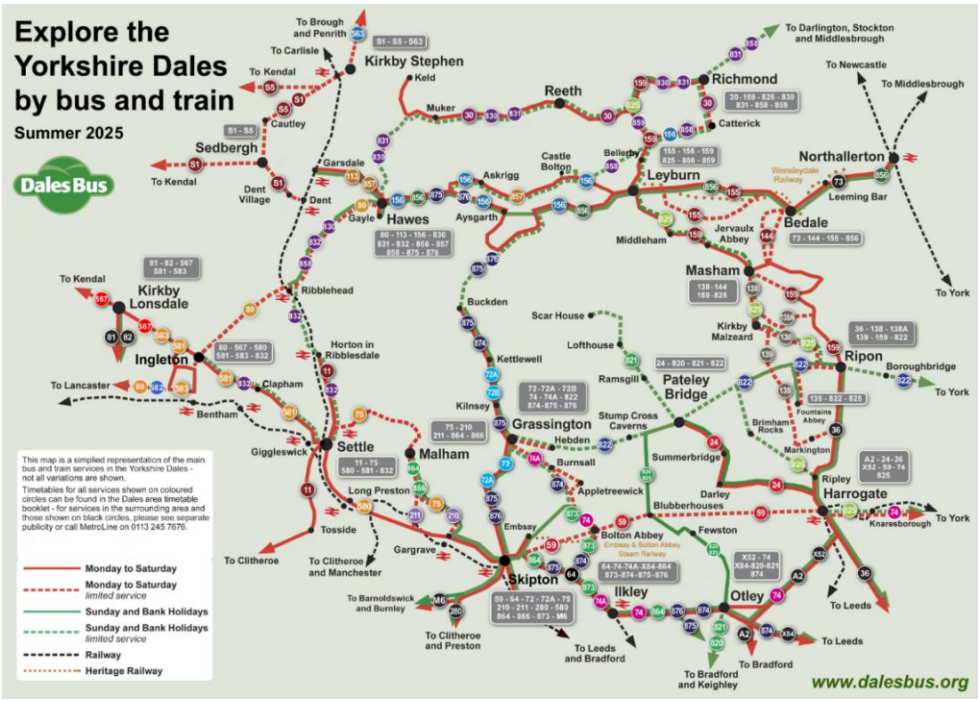
In our consideration of equity benefits (Section 3a(iii)), we suggest that there are three types of beneficiaries related to their ability to access a car. We feel that there is significant potential to design targeted marketing strategies informed by these sub-markets, both to drive volumes of people onto the services, but to maximise the their equity benefits.

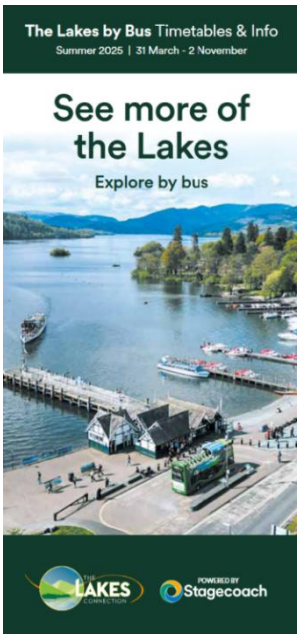
The SITU case study revealed the popularity of their bus services by people in camper vans and visitors using roof tents (Section 3a(iv)). How many services in rural visitor areas might benefit from acknowledging markets such as these in their marketing?

c. *Network*

A service being part of a local network has three main advantages:

- It provides a sense of access across the destination rather than just on one service – giving the visitor a sense that it is part of something bigger.
- It provides opportunities for destination-scale ticketing deals, so that the network is a welcoming mesh of access into and around a destination – more akin to access passes rather than service-by-service or journey-by-journey bus tickets.
  This has been compromised to some extent by the otherwise valuable £2 / £3 flat fare schemes.
- The services being presented as a network – through information and timetables – indicate a value for access across an area that is greater than individual services, as shown below for Dalesbus and the Lake District.





However, this *can* be seen as too complex by some people, as it is well known that different people have different abilities in their understanding of timetables and network maps[29].

d. *Mixing visitor and resident demands*

Section 3c summarised the mutual benefits of serving both visitor and resident markets. This needs to be considered in service design or enhancement – such as when considering routes and timetables.

Can the seasonal explorer bus be set up so that an early & late service is added (and funded separately?) to enable worker access to hospitality jobs? What enhancement might be made to a struggling resident-focussed service that might attract visitors and leisure use?

The successful mix of demands has the potential to:

- Lengthen the service operation – earlier/later in the day, more days in the year, or year-round instead of seasonal
- Reduce the need for subsidy or grant support
- Provide a less tangible contribution to a more authentic visitor experience[30]

In mixing demands, there is always the risk of catering to neither very well.

e. *Year-on-year stability*

Some services are seen as an integral part of a destination – such as the 100-year-old 555 service through the Lake District; others, whilst popular, are only as stable as year-by-year grant funding allows.

Year-on-year stability has four advantages:

- Service details are included in destination information & marketing – a lot of which has lead-in times of many months.
- Visitors can imagine and plan a forthcoming trip with confidence, especially as in many places, most visitors have been before. For example, in the Peak District National Park "around half of visitors are regular, repeat visitors (visiting at least once a month), just over a quarter are less frequent visitors and just 7% are first time visitors"[31].
- Local visitor businesses are confident to market the opportunities afforded by the services to their guests and customers, such as in communications after guests have stayed to tempt them back for a subsequent trip.
- It creates opportunities for strategic investment in the service – such as appropriate designed vehicles in the fleet for the specific services or creating specific branding.

f. *Scale*

Scale, stability and networks are loosely linked.

Scale in relation to service means vehicle capacity and frequency (leading to overall service capacity) linked to volumes of users leading to levels of revenues and viability/profitability. These need to be built over time and so profitable services normally have a long legacy of financial support and expansion over many years. This is illustrated by

- The New Forest Tour services – initially supported by the NPA and others to become better established and recognised as part of the attraction leading to its commercial viability
- SITU's ambitions – to expand services, even if this means a continuing pressure to maintain or expand the level of financial support needed in the short term – to achieve a more viable and meaningful scale in the medium to longer term.

g. *Partner involvement and sense of ownership*

This works differently depending on type of service, but seems to be important for all but in different ways. For instance:

- The smaller seasonal services such as the Wasdale Explorer or Shropshire Hills Shuttle are well-embedded locally, either with the resident community (Wasdale) and/or local partner organisations (Shropshire Hills)
- The more commercial services are co-marketed with local destination marketing organisations
- The SITU case study is distinctive in that the organisation is a coming-together of visitor businesses & resident communities who then started to actively develop and support bus services. This sense of ownership means that innovations such as the *bus stop WhatsApp group* (see case study) emerge.

h. *Demand management: car restraint*

Whether visitors are *able* to use their car where a bus service exists is significant in terms of a service's viability and success. Most of the services included here rely on voluntary behaviour – i.e. there is (visitor) car access along the routes and to its served destinations, but visitors with access to a car *choose* to use the bus as a more attractive alternative.

Typically, 70-90% of visitors travel around rural destinations by car, so the numbers of people using buses is still relatively small. This is due to road use being seen as "free" for car users, and an assumption that there will be sufficient car parking; whilst the ability for landowners to supply extra "pop-up" car parking for up to 28 days in a year helps tackle the localised acute problems of visitor cars, it contributes to the more endemic problems of car dependency, an assumption of (relatively) easy car access, and the compromising of bus service viability or scale.

Area-wide demand management is a part of two of the case studies included here:

- The enhancement of the Sherpa service from Nant Peris←→Pen-y-Pass involved coordination between (1) verge car parking enforcement (of up to 480 cars per day), (2) introduction of pre-booking of car parking and significant increases in tariffs at Pen-y-Pass and (3) doubling the frequency of bus services from the Park & Ride car park at the bottom of the valley to 4 services per hour.

  The main purpose was to tackle dangerous and blighting verge car parking, and so in doing has created conditions for much better bus service provision and – most importantly – happy visitors.
- The single-track road for the final 5 miles to Wasdale Head was designated a clearway – meaning that car parking was only allowed in designated places. This provided an important demand management tool that has helped with ridership on the Wasdale Explorer; 46% of respondents to the user survey included "parking is difficult" as a factor that led to them using the bus.

A comment by the SITU interviewees was typical of several of the case studies "Car access to be restricted progressively as alternative access options build".

i. *Experience or journey – or both?*

A few interviewees acknowledged that there was tension in the design and marketing of their services between it being a visitor experience or a more practical way of getting from A to B; some users wanted a day out and were happy for a slow journey as it was part of a leisure experience, whereas others wanted or need to just make a journey. This played out in terms of directness of routing, overall speed and marketing. It was acknowledged as mainly irresolvable except through significant expansion that might allow either express and less direct versions of

the same service (such as the Lancaster-Kendal part of the 555), or the overlay of several types of service in the same area.

j. Winter season operation

Many services included here are either summer-only or have a much reduced timetable in winter. It was clear from many interviewees that there was still visitor demand off-season – and that off-season visitor demand is building - and there would be benefits from being able to provide year-round certainty in bus access.

5.2 What makes services better overseas that doesn't happen in the UK?

If we look to successful rural visitor destinations in places like Switzerland, Austria and US national parks, how do their bus services operate differently compared to in the UK? What might we learn from these differences? The following extract some key differences that might be applied in the UK.

a. Governance & economic models

In Germanic countries, it is common that bus services are franchised via some form of sub-regional transport body such as a Verkhersverbund[32]. In the Tyrol region of Austria, 10-year franchises are common for key services or across localities. This means that service levels are stable – providing year-on-year certainty – plus some revenues from profit-making parts of a system can be redistributed as appropriate to provide the desired service levels.

At a more local level, governance means area-wide (visitor) access management – when services and visitor car access restrictions are managed and presented as an integrated package. In many US national parks, access shuttle services are part of seasonal traffic management, sometimes linked to capping of visitor volumes. These often provide dedicated access from nearby settlements as well as integrated park & access ticketing from parking outside the Parks.

From a governance perspective, the key difference is that local partnerships – often *including* the bus operators - are responsible for designing the bus service levels. This brings in a wider range of interests than just the bus operator, and as such creates a broader ownership of the services. This is similar to England's *enhanced partnership* model[33], though often relates to seasonal services and year-on-year stability.

The 2019 DEFRA/Glover review of protected landscapes[34] highlighted the need for changes in transport governance in UK national parks as a prerequisite for the delivery of transformational change. Further work (supported by the FIT) explored that a pragmatic governance model probably involves a *formal* partnership between a NPA and its host LTAs[35]. Whether this might involve enhanced partnerships or even micro-franchising[36], governance at a national park level is key to stable bus services that provide good service levels in rural areas that attract significant visitor numbers. Closely related to governance is economic model and how a variety of revenue streams might be captured and managed – the next section.

b. Guest cards

It is almost a norm that many visitor destinations in the European Alps have some form of "guest card" that provides access to buses to allow visitors to get around during their stay. In the Austrian Tyrol region, there are 34 different schemes that are mainly linked to valley-scale local tourism management.

Guest passes often have some form of a free pass for staying visitors; this is almost always principally funded via a bed tax. More extensive paid-for passes are available for all visitors[37]

Regardless of how they are funded, guest cards that provide travel take away a significant barrier for visitors to use local bus services for their stay; they are overtly marketed as a perk[38] and act as a welcome as part of the social contract between a destination and its guests.
In the UK, whilst day or multi-day areas-wide passes exist, they are almost always linked to a specific bus operator and are commercial paid-for products. A notable exception relevant here are the Rover and Ranger tickets[39] that integrate rail and bus to provide access to and around many rural destinations. There seems to be enduring fairly low awareness of these tickets among the public.
A wider range of destination multi-modal access "guest" passes *could* exist, but currently would require operators to come to a voluntary agreement to do this. During the Churchill Fellowship study tour, several interviewees were slightly bewildered that UK destinations did not have the "guest pass" model that they say as a standard part of the European visitor offer.

c. Integration and service levels

Partly because of the mechanisms of area-wide franchising, bus services in alpine destinations are operated and presented as a network; the integration sometimes is beyond the bus network, with basic guest cards including rail and sometimes cable cars[40]. For the visitor, this shows the opportunity for access across their destination as part of the visitor proposition.
Service levels are of high quality. This often means bus services from early morning to late evening; in the Stubai valley[41], buses run year-round from 5:30am to midnight every 15 minutes with three night buses. The Stubai valley welcomes about 1m visitors per year, similar to the Ullswater valley in the Lake District.

5.3 Service checklist?

The following takes the lessons for good practice (sections 4 a & b) and inverts them into targeted questions so that they can be used as a service checklist; note that not all questions apply to all types of service. To keep this brief, we invite readers to refer back to the relevant parts of Sections 5a & 5b.

This checklist is based on the findings from this study. It complements the Visitor Bus Toolkit[3].

a. Branding and identity

What does the service's identity say about it?
Whilst service numbers (555 or X33) work for regular bus users, named services potentially open up a bigger potential pool of users. If a visitor isn't too sure of the local geography, then names that include some element of place ("Jurassic Coast", "Shropshire Hills") and type of experience or journey ("Explorer", "Shuttle", "Express") help demystify them to visitors.
On the other hand, services that are overtly branded and presented for visitors could alienate local people from using them as they are "not for us". The case studies here suggest that local residents value and use local visitor-targeted services, mainly for leisure. Whether they work for more routine utility trips (such as getting to work/college or shopping) is probably more related to local geography, timetabling and ticketing.

b. Network

Is your service part of a network? Are the benefits of it being part of the network explained clearly – it being about freedom of access across an area as well as just a single journey. Is there A-to-B-to-C through-ticketing for connecting journeys? Are there area-wide passes? If so, are these marketed as guest "freedom" passes or "bus passes"? Are these products that can easily

be understood, marketed and made accessible by visitor businesses and as part of destination marketing?

c. *Mixing visitor and resident demands*

Whilst the service might be designed for a main target user market, are there opportunities to attract broader user groups to the service through minor refinements? This might involve looking at:

- Timetabling
  Earlier or later services enabling hospitality workers to use day-time visitor bus services for their commute?
- Seasonality
  Is there any way a seasonal service might be stretched to year-round to provide reliability for (a) residents to rely on the service for their day-to-day needs and (b) off-peak visitors to have *some* access in the quieter months?
- Branding, information & marketing
  With reference to 5.3a, does the presentation of the service appeal to different markets - or put off some users as it's seen as "not being for people like me"?

d. *Year-on-year stability & scale*

Smaller, more localised and independent visitor services are generally dependent on grant funding. This is usually from mixed sources and on a year-by-year basis, often (according to our case study interviewees) at the very last minute. This leads to significant instability and stress among those invested in the service.

Is there a different way of setting up the economic model of the service?

Who has a vested interest in it operating year-on-year, and how might they be convinced to support it[42]?

Is the case for multi-year support different from year-on-year, and if so, can it be presented to different types of funders in a different way?

Is funding (a) for the bus service in isolation, (b) for visitor access more generally (integrate with parking fees or other local transport services?) or (c) as part of a visitor proposition for the destination (so integrate into a broader guest package)?

Might there be a way of working with an operator to build ridership over – say – 3 years to unhook the service from reliance on grants? Might modifying the service better meet local need and therefore be a candidate for BSIP support?

e. *Partner involvement and sense of ownership*

Are the right partners involved?

Those who established the service might not be the best placed to develop the service to the next level. What other possible partners might approach the service development or operation differently? Are there any skills or expertise missing that could be provided by better linking to certain partners?

Does the service feel "owned" locally? Is there any sense of pride or loyalty among users (or more generally) and if not, is this something that can be better developed?

The idea in this section and 5.3a come together to explain a common problem in many smaller visitor bus services, namely that significant effort and goodwill goes in to developing and delivering a service, leaving little capacity and resource for marketing. Several case studies suggest that this is less significant with the advent of social media as the financial cost of

marketing can be reduced with targeted social media-ready resources being made available to local business and organisations.

f. Demand management: car restraint

Do the buses serve places that are "free" to access by visitors' cars?
Is there an argument to consider demand management – i.e. constraining access in some ways by visitor cars? This might involve

- better enforcement of verge parking
- considering clearways on local roads
- zoning car park pricing
  The Sherpa case study describes significant increases in parking prices at the pass itself with pre-booking required, with much lower prices in the valley at the park & ride site.
- seasonal approaches to visitor car access into the locality based on an idea of car carrying capacity – i.e. how many cars "fit" in the locality, and managing this accordingly for busy seasons – as happens in many US national parks such as Yosemite[43].

g. Economic model

Is the service operating under the best economic model?
Might there be ways of capturing revenues from other sources to support the service? Is there potential for integrated parking & bus tickets?
Might there be any appetite for a "Guest card" type system as a visitor perk? Who might be involved and how might it be funded?
If it's a free service (such as the Wasdale Explorer or Blenheim shuttle), are the right organisations under-writing it? Does it *need* to be free if it is dependent on unstable grant income? Might people value it more if it was not free?

6. And finally…

This work has looked across hundreds of UK visitor bus services then dived into the detail on several partly in order to identify what messages emerge when looking at them together and what might be done to enhance the benefits from the visitor bus sector.

6.1 Key messages

1. There are *hundreds* of bus services that in some way could reasonably be described as visitor bus services.

2. There is a variety of *types* of visitor bus services
   Some are stable and a part of the fabric of destinations, others are unstable and grant-dependent, some are deliberately building (and others have built) patronage to become viable. Whilst visitors and leisure use are important for all, the way that the different types of services are operated, their scale, stability, viability and marketing are often very different.

3. Because of the variety, services can learn from each other.
   The different cultural and economic contexts and scales of the different types of services mean that only looking at them together leads to some opportunities for ideas to transfer between them. How might commercial open-top services engage better with their resident communities? What can isolated Rambler services learn from commercial branding consistency? Could SITU's bus stop WhatsApp group be an effective human face of real-time information?

4. Effective marketing is crucial for the success of visitor bus services.
   It is well known that people are more open to travel differently when at leisure, so targeting marketing in ways that make bus use appealing to the variety of types of visitors plus making information easily accessible is crucial to their success – and to realise the benefits and outcomes of the existence of the services.
   Many visitor buses provide experiences, so the presentation of services as part of an experience is often important to their success – either on their own (the enjoyment of an open-top tour) or integration with access to attractions or locations.

5. There *is* a case to consider these together as a sub-sector.
   The scale, scope, variety and value of services mean that visitor bus services in rural areas are not generally seen as a coherent sub-sector. However, visitor bus services deliver on social, environmental and economic outcomes but the potential for maximising these outcomes is currently compromised because:
   - Indicators for success for visitor buses services are sometimes different from standard bus services meaning that they do not directly align with current transport priorities and funding mechanisms;
   - existing transport governance does not work well for visitor bus services.

   Together, these
   - compromise the potential for maximising their social, environmental and economic benefits and
   - help to explain long-standing issues such as limits in some areas of services on Sundays and bank holidays.

6. The paucity of robust evidence of impacts means making a strategic case for visitor buses is currently difficult.

The benefits they provide are well understood by those involved, but monitoring is neither routine (mainly due to limited budgets) nor consistent across services when it *is* undertaken; as many services are commercial, any data or evidence is commercially confidential.

6.2 Recommendations

1. Those involved with providing the services (operators, local partnerships, lead contracting body etc) – especially of funded services - might benefit from
   a. Looking across the services described here and best practice to explore opportunities for developing or finessing services.
      The different contexts of the service types means that what is an is not relevant will be up to those involved.
   b. Formalising a partnership so that roles and responsibilities are clear, and those with appropriate expertise bring it to the development and delivery of the service; we revealed – especially with marketing – that some jobs are left to a part-time project officer even though relevant expertise was embedded into partner organisations

2. Destination marketing and information providers consider the lessons from across the service types presented here in terms of how the range of types of services in their areas might be presented better to target users. In a simplistic way, this is about better targeting to car-based and non-car based visitors and about whether the services provide experiences or (just) functional journeys.
   We think there is significant potential
   - to market the ability to get around without a car to the variety of types of people and households without access to a car for different reasons
   - to create a wider range of propositions such as 1-way walks, ale trails etc – where the pretty much the *only* way of having the experience is by bus

3. Transport Authorities should
   a. Consider more deliberately how visitor bus services deliver on their priorities, and so include them more explicitly in policy and funding considerations. This includes
      - supporting services on Sundays and bank holidays which are often the busiest days for visitor demand
      - specifically acknowledge visitor travel in Local Transport Plans, and other strategic planning to consider integration of visitor transport requirements.
   b. Work with those involved in visitor bus services to develop more resilient services that are better able to expand, capture increasing proportions of visitor movement demand, provide better services for resident communities and ultimately reduce the demand for subsidy
   c. Make sure that appropriate support services (such as contracting, information & timetabling design & integration etc.) are easy to access for those involved in the detail of management of visitor bus services.
   d. Make sure that visitor services – and their benefits – are considered in an appropriate and meaningful way when undertaking network reviews and /or exploring appropriate location, scope and models for franchising.
   e. Use LTA powers and abilities to better manage visitor car access (especially at busy times) to drive demand to bus services so that the benefits that flow from bus use are maximised.

f. Better understand and appreciate the impacts and costs of car use by visitors on their local and regional networks
g. Recognise the conflict between Local Authority policy objectives and existing dependency on visitor car parking revenues, consider ways to break this link in the medium-to-longer term.

4. Regional Government and/or Combined Authorities are well placed to develop specific strategy and policy to support visitor and leisure bus services. They should
    a. ensure that the importance of the sector is explicit within their plans,
    b. provide capacity and capability to ensure that there is a consistent and joined up approach across the UK.

5. Appropriate Government departments (Department for Transport, DCMS, Transport Scotland, Transport for Wales) should
    a. Acknowledge the scale, variety and value of visitor bus services
    b. DfT, TS, TfW: review funding formulae and guidance to make sure that they would maximise the (sometimes different or indirect) benefits of visitor bus services – especially relating to carbon reduction, health & wellbeing and medium-term economic prosperity; ensure that the value of visitor bus services are explicitly acknowledged in planning, assessments and guidance such as webTAG, STAG etc.
    c. Pro-actively create conditions for locality (e.g. valley or coast) or destination (e.g. National Park/Landscape) scale visitor access management innovation.
    This might be through new models of franchising or integration, or demonstration programmes. This would help to fill the vacuum of responsibility that is leading to UK rural visitor destinations falling behind European competitors in terms of high quality, integrated low carbon visitor access and transport propositions; the solutions are about access and transport, but the benefits are realised in a flourishing future-looking low tourism economy.
    d. Ensure visitor travel is defined and captured within national policy frameworks, future cross-department strategies, is part of an integrated offer across transport planning and delivery.

6. Visit Britain & DCMS should acknowledge and celebrate the scale, diversity and potential of visitor bus services in terms of:
    - how they contribute to the visitor proposition of the UK's rural visitor destinations
    - their dialogues with LVEPs in terms of prioritising visitor bus services in their destination marketing
    - recognising the opportunities that exist for overseas visitor travelling without a car to explore the UK's rural visitor destinations, and help to create resources and information to facilitate this

7. Visitor attractions and especially national networks such as the National Trust, English Heritage, RSPB, Forestry England (etc) should:
    - be more open and confident in communicating the impacts of visitor car access on that which they are seeking to protect (landscape, biodiversity, heritage etc) and the positive alternative ways that their visitors can travel to visit them
    - be more confident in their communications about prioritising bus access over car access to their sites and attractions where reasonable services exist

- expand efforts to develop new or enhanced services – to reduce car demand, but to open up their sites to the potential visitors who do not have access to a car for a wide variety of reasons.

8. There should be an enduring central hub of knowledge, best practice and information exchange for visitor bus services. The value of this would be not only as a resource for those involved in service design and delivery, but would open opportunities to build an evidence base of impacts and a more coherent enduring voice to make the case for visitor bus services.

The accessible rural visitor destination demonstration challenge?

This works has helped to reveal significant innovation taking place across the country on rural visitor bus-based visitor access and transport. This is generally happening independently of public sector involvement, and partly in response to the recognised – yet poorly understood – changes in visitor travel behaviour, norms and values following Covid-related lockdowns.

It suggests that there is the potential for a national programme of accessible rural visitor destination demonstration challenges. This might include:

- area-wide (National Park/Landscape) or locality (valley/coastline) scale,
- appropriate governance & economic model,
- multi-modal access options,
- micro-franchising,
- visitor car access management,
- focus on target markets – car based visitors who are willing to change and excluded non-car (potential) visitor markets.

It might be appropriate for this to be led jointly between the DfT / DCMS (and/or TS/TfW) and Visit Britain

The main purposes would be to

- demonstrate what world-class bus-based visitor access could look like in the UK so that the quality competes with the best global destinations
- Create ideas, systems and models that can be translated and scaled up across the UK,
- raise ambitions of what is possible *and* deliverable
- lead to meaningful reductions in carbon emissions from visitor and leisure travel, open access to the UK's rural visitor destinations and make them more future-ready for changing travel trends, demonstrate the economic benefits of area-wide visitor access management and the role that buses have in unlocking this.

Appendix 1: Results of 2018 Tripadvisor poll of the top 20 Most Scenic Bus Routes in Britain

https://www.tripadvisor.co.uk/ShowTopic-g186216-i15-k11637228-Most_Scenic_Bus_Routes_in_Britain-United_Kingdom.html

A survey has been carried out in May 2018 and these are the nation's favourite routes in England, Scotland & Wales. Here are the Top 20, more details at @MostScenicBus on Twitter.

1. 840 Coastliner – Leeds & York to Whitby via Pickering over the North York Moors - Transdev Blazefield
2. 914/915/916 - Glasgow to Fort William to Skye via Loch Lomond, Rannoch, Glencoe and Great Glen - Scottish Citylink
3. 50 Purbeck Breezer - Bournemouth to Swanage via Sandbanks, Shell Bay and Studland - morebus (Go Ahead)
4. Needles Breezer on the Isle of Wight - Yarmouth to the Needles via Freshwater Bay - Southern Vectis (Go Ahead)
5. 919 - Fort William to Inverness via Great Glen and Loch Ness - Scottish Citylink
6. B3 Bronte Bus - Hebden Bridge to Haworth - Transdev Blazefield
7. 40 Purbeck Breezer - Wareham to Swanage via Corfe Castle - morebus (Go Ahead)
8. 124 - Edinburgh to North Berwick via Longniddry and Gullane - East Coast Buses
9. Island Coaster on the Isle of Wight - Ryde to Shanklin via Alum Bay - Southern Vectis (Go Ahead)
10. X93 - Middlesbrough to Scarborough via Whitby along the North Yorkshire Coast - Arriva North East
11. 376 Mendip Xplorer - Bristol to Wells/Glastonbury/Street - First West of England
12. X53 Jurassic Coaster - Weymouth to Axminster - First Wessex
13. 555/599 - Lancaster to Keswick via Windermere & Grasmere – Stagecoach Cumbria & North Lancs
14. 77/77A - Keswick circular via Braithwaite, Buttermere and Borrowdale - Stagecoach Cumbria & North Lancashire
15. 184 - Manchester to Huddersfield over the Pennines - First Manchester
16. 24 - Harrogate to Pateley Bridge along Nidderdale - Transdev Blazefield
17. 20 Somerset's Coaster - Weston-super-Mare to Burnham-on-sea - First West of England
18. 36 - Leeds to Ripon via Harewood and Harrogate - Transdev Blazefield
19. 508 - Penrith to Windermere via Pooley Bridge and Patterdale - Stagecoach Cumbria & North Lancashire
20. 976 - Glasgow to Oban via Rest and be Thankful and Inveraray - Scottish Citylink

Appendix 2: Rural visitor bus service case studies

The following table summarises the case studies and the type of service they illustrate.

The case studies themselves are available in the accompanying Annexe 2. Note that we will add case studies as they become available

Service(s)	*Location*	**Tour / experience / open-top**	**Rambler / Explorer**	**To specific attraction**	**Express serving visitor areas**	**Local bus serving visitor areas**	**Urban - rural connection**	**Network**
555	Lake District	1				5	6	7
Wasdale Explorer	Lake District		2					
Shropshire Hills Shuttle	Shropshire		2					
Blenheim Shuttle	Oxfordshire			3				
Sherpa	Eryri (Snowdonia)		2	3				
Ullswater / SITU			2			5		
Dalesbus	Yorkshire		2			5	6	7
Scottish Citilink	Scotland				4			
Trossachs Explorer	Scotland		2					
Jurassic Coaster	Dorset	1				5		7
New Forest Tour	New Forest	1						

[1] Transport Statistics Great Britain, 2024.
[2] https://scenicbuses.co.uk/
[3] https://www.newforestnpa.gov.uk/app/uploads/2018/01/Visitor_Bus_Toolkit.pdf
[4] We are particularly grateful to Andi North for freely supplying further detail of the services at https://scenicbuses.co.uk/
[55] https://nationalparksengland.org.uk/
[6] https://national-landscapes.org.uk/
[7] https://www.goodjourney.org.uk/
[8] This blog (October 2025) explores the scale of this in more detail: *Car dependent destinations are bad for rural visitor economies*, https://lowcarbondestinations.org/car-dependent-destinations-are-bad-for-rural-visitor-economies/
[9] The "Give the Driver a Break" was a summer campaign used over several years in the Lake District to encourage bus use by visitors. It was linked to leaflets and maps of key visitor bus routes with clear suggestions for what do see and do along the route; https://www.thewestmorlandgazette.co.uk/news/597295.give-the-driver-a-break/
[10] Evidence suggests that 2/3 of passengers on the Pembrokeshire coastal shuttles are using it to access linear walks along the Coastal Path (Martin Higgitt, *pers. comm.*)
[11] By 2021, 75% of UK Local Authorities had declared a climate emergency; https://www.sciencedirect.com/science/article/pii/S0301421521001142
[12] "…over 300 local authorities declaring a climate emergency, and nearly two thirds of councils in England aiming to be carbon neutral 20 years before the national target…", Local Government Association, 2021; https://www.local.gov.uk/delivering-local-net-zero
[13] Useful summary at Figure 6 (p19) of https://www.sw-consulting.co.uk/_files/ugd/f0a44c_4d720d4438164e7dbafa996aa4a19d9b.pdf
[14] Explained at https://www.nationalgrid.com/stories/energy-explained/what-are-scope-1-2-3-carbon-emissions
[15] A summary is given at https://lowcarbondestinations.org/wp-content/uploads/2024/01/NPs-GHG-travel-proportions-1.jpg
[16] https://www.gov.uk/government/statistics/national-travel-survey-2024/nts-2024-household-car-availability-and-trends-in-car-trips
[17] This blog sets out the volumes of young adults don't have driving licenses through the lens of the implications for access to rural visitor destinations; https://lowcarbondestinations.org/car-dependent-destinations-are-bad-for-rural-visitor-economies/
[18] For instance, 45% of households in Glasgow in 2011 did not have access to a car (Scotland census, 2011; https://www.scotlandscensus.gov.uk/census-results/at-a-glance/housing/)
[19] As illustrated by https://www.whitehavennews.co.uk/news/19340167.emergency-services-issue-parking-plea-wasdale-head-congestion-lakes/
[20] https://committees.parliament.uk/writtenevidence/96101/html/
[21] Zak Viney (2022) *Are rural communities being left behind with active travel?*, blog for CyclingUK; https://www.cyclinguk.org/blog/are-rural-communities-being-left-behind-active-travel

[22] https://www.transportforthenorth.com/wp-content/uploads/Final-severance-report.pdf
[23] *Transport and social exclusion in the North in 2023/24*, Transport for the North, 2024; https://www.transportforthenorth.com/publications/transport-and-social-exclusion-in-the-north-in-2023-24/
[24] https://www.transporteast.gov.uk/strategy/latest-projects/trse/
[25] Some examples summarised at https://lowcarbondestinations.org/six-components-detail/#appropriate-governance; how this might apply to the UK is explored at https://www.rgs.org/media/efejmjps/8-alistair-kirkbride-low-carbon-rural-tourismpptx.pdf
[26] https://hopevalleyclimateaction.org.uk/mini-switzerland-pilot-here-in-the-hope-valley/
[27] SCOTO "Seeking to recalibrate tourism in Scotland to deliver for our communities and environment first", https://www.scoto.co.uk/
[28] Many examples included in https://lowcarbondestinations.org/component-model-graphic/
[29] Nivala, A. et al 2007 *Usability problems of web map sites*, Proceedings of the International Cartographic Conference, Moscow, August 2007; https://www.dcs.gla.ac.uk/~stephen/papers/Nivala_etal_ICC07.pdf
[30] "Authenticity" is a recognised tourism trend as illustrated by "In particular, there is a real desire for honest authenticity – whether it be discovering real customs or interacting with locals" https://www.wearetribeglobal.com/News/Tourists-are-Looking-for-a-Real-Authentic-Experience; "While on vacation, 90% of travelers say that experiencing a destination as locals do is a priority" from 2023 Travel

Trends: U.S. Travelers Aim to Experience Destinations as Locals and Crave More Authenticity (https://www.getyourguide.press/blog/2023-travel-trends-u-s-travelers-aim-to-experience-destinations-as-locals-and-crave-more-authenticity)

[31] The State of the Park Report, Peak District National Park Authority (2024) https://reports.peakdistrict.gov.uk/sotpr/docs/adventure-&-exploration/market-visitors.html

[32] Verkhersverbund are regional transport boards in many regions in Germany and Austria. They are responsible for setting public transport service levels, fares and integration via long – often 10-year – franchises. See Whitelegg, J. 2023 *International best practice and innovation in transport of direct relevance to policy development in North Wales*, report for the North Wales Transport Commission; https://www.mobilitaetskultur.eu/wp-content/uploads/Whitelegg-summary-Feb-2023.pdf

[33] https://www.buscentreofexcellence.org.uk/enhanced-partnerships-delivering-better-bus-services

[34] Proposal 19 (pp 112-115) of Glover, J. (2019) Landscapes Review, Report commissioned by DEFRA. https://www.gov.uk/government/publications/designated-landscapes-national-parks-and-aonbs-2018-review

[35] Kirkbride, A. 2021 *National Parks access & transport: an optimum model for governance*, Final report prepared as part of a fellowship with the Foundation for
Integrated Transport, December 2021;
https://integratedtransport.org.uk/downloads/Alistair_Kirkbride_final_fellowship_report_December_2021.pdf

[36] https://www.route-one.net/news/pilot-schemes-set-to-explore-models-for-rural-bus-franchising/

[37] For instance, the Stubai pass provides access to buses and certain events in the summer; the paid-for Stubai Super Card extends the benefits to more options including cable cars.

[38] Werfenweng (Salzburger region, Austria) saw an increase in visitor volume and value as the Werfenweng Card (https://www.werfenweng.eu/en/holiday/werfenweng-card/), although this did coincide with more significant marketing and transport services provision.

[39] "…perfect for exploring, with the freedom to make as many stops as you want. They may also include local bus travel, and there are often other offers and discounts available"; https://www.nationalrail.co.uk/tickets-railcards-and-offers/ticket-types/ranger-tickets-and-rover-tickets/

[40] "Buses, trains, cable cars are free if you have the Südtirol Guest Pass in your wallet" https://www.suedtirol.info/en/en/information/mobility-and-barrier-free-accessibility/local-transport-in-south-tyrol/mobilcard

[41] https://www.stubai.at/en/info-service/timetables/

[42] SITU was partly founded on visitor businesses in the Ullswater valley together contributing to financially under-writing enhancements and expansion to its visitor bus services – see case study (Appendix 2 & Annexe 2)

[43] Reservations are required to enter Yosemite National Park in its busy seasons, the number of cars beingh capped daily and shuttles being available; https://www.visitcalifornia.com/experience/yosemite-national-parks-updated-reservation-policies/