



Gloucestershire: rail to leisure

May 2023



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Final Report

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Produced by:



For:



Contact:

Hannah McDonnell
Gloucestershire Community Rail Partnership

hannah@gcrp.org.uk
Gloucestershire Community Rail Partnership

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Table of Contents

Executive Summary	i
1. Introduction.....	1
2. Background.....	3
3. Literature Review.....	5
4. Gloucestershire Stations Passenger Survey	15
5. SWOT Analysis.....	27
6. Pestle Analysis	31
7. Conclusions and Recommendations	34

List of Tables

Table 5-1: SWOT Analysis	27
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List of Figures

Figure 3-1 Emissions by mode of transport.....	7
Figure 3-2 Community Rail Development Strategy four pillars	8
Figure 4-1 Home postcodes of Stroud and Kemble Survey respondents.....	16

Appendices

Appendix A Bibliography	
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Executive Summary

In 2019, all Gloucestershire councils declared a climate emergency, which included commitments to be net zero by 2030 and deliver a carbon neutral county by 2045.

Based on global figures, it is estimated that around 10% of CO₂ emissions are a result of tourism.¹ Given the importance of leisure and tourism to Gloucestershire, it is likely that this figure reflects the position in the county. Therefore, changing travel behaviours associated with tourism and leisure, including more travel to, from and within Gloucestershire by rail, will be important in managing and reducing these emissions.

Encouraging tourists to travel by rail requires collaboration and cooperation across a range of stakeholders involved in leisure and tourism to influence and change behaviours. There is a significant opportunity for Gloucestershire Community Rail Partnership to initiate and facilitate collaborative approaches and be at the centre of efforts to achieve more sustainable tourism in Gloucestershire.

A coordinated approach is essential to improve 'last mile' connectivity, so that when visitors arrive in Gloucestershire, they can travel sustainably between places of interest rather than having to rely on cars. The semi-rural geography and limited infrastructure create a challenge to this. However, any improvements in local connectivity will benefit residents as well as visitors, enabling them to also use more sustainable modes of transport for everyday travel needs.

Encouraging longer-stay rather than day tourism is important for delivering local economic benefits. This will require collaborative marketing effort to promote the wide range of activities Gloucestershire has to offer and how using rail can enable visitors to explore the area.

¹ Envisioning Tourism in 2030 and beyond, produced by Travel Foundation, 2023

1. Introduction

- 1.1 Gloucestershire Community Rail Partnership (GCRP) seeks to promote interest in, and usage of, the rail network across Gloucestershire. It is therefore keen to explore and understand opportunities for growing the local rail market, considering the needs of different types of users and the different reasons for using the railway.
- 1.2 Given the potential importance of tourism to rail travel and the ability of rail to promote visitor travel, GCRP commissioned this research to explore these links further. This is particularly relevant given the increased importance of leisure travel by rail compared with commuting following the Covid-19 pandemic. The Office of Road and Rail (ORR) notes in its quarterly report on passenger rail use (October – December 2022) that “leisure travel has returned more strongly than commuting.”² Furthermore, season tickets accounted for just 15% of journeys made, which was less than half of that recorded 3 years previously.
- 1.3 The aim of the research is to use local and national evidence to develop a strong base to demonstrate the important links between rail travel and leisure/tourism (as well as identifying the potential benefits of making those links), in respect of:
 - The role and potential role of rail travel in facilitating tourism and participating in leisure and recreation.
 - The extent to which tourism supports and promotes rail travel and increases its modal share in this market
 - The existing and potential benefit and contribution to the sustainability agenda - triple bottom line considerations with community benefit a key element from a community rail perspective
 - The benefits of rail in reducing the impacts of road traffic, improved air quality and reductions in carbon emissions (considering residents’ and visitors’ experiences)
- 1.4 The main objectives of the research are to:
 - Draw on evidence previously gathered by GCRP and make the case for measures to support leisure/tourism by rail.
 - Gather evidence and undertake further analysis of datasets identified by GCRP.

² [Passenger rail usage - October to December 2022 \(orr.gov.uk\)](https://www.orr.gov.uk), (Accessed: 15 May 2023)

- Carry out a wider desk-based review of relevant published literature.
- Analyse results and findings of local rail user surveys undertaken at Stroud and Kemble stations in respect of the answers in the context of leisure and tourism.
- Draw together relevant findings to provide a compelling case for actions to promote rail use in the leisure and tourism market that can be used to encourage local stakeholders to commit to playing a future role.
- Highlight potential actions.

2. Background

- 2.1 Gloucestershire is a predominantly rural county that boasts a collection of market towns and green landscapes that are both popular amongst residents and visitors. 23 million people visit Gloucestershire every year, of which 21 million are day visitors. Currently, 81% of visitor trips are made by car³. Consequently, there is a balance between the costs and benefits of those journeys – on one hand they contribute to local emissions and congestion, whilst on the other providing benefit to the local economy.
- 2.2 In 2019, Gloucestershire County Council declared a climate emergency, which resulted in a Climate Change Strategy with carbon reduction targets and a short-term action plan. The Strategy provides a commitment to be carbon net zero by 2050, with emissions reduced by 80% by 2030 compared to 2005 levels. It also envisages the provision of high-quality services that will encourage a ‘significant shift’ in travel behaviour to reduce car emissions in the county. To reduce car emissions, a significant modal shift from private car to public transport will be necessary.
- 2.3 This report looks to support the Strategy, focusing on the importance of rail as an alternative to the car, particularly for leisure and visitor travel.
- 2.4 Visit Gloucestershire is the Destination Management Organisation (DMO) for Gloucestershire, with the Visit Gloucestershire Partnership having been formed in 2020. The Visit Gloucestershire Tourism Strategy⁴ outlines several objectives under the categories of economy, natural and cultural environment, community and infrastructure and place. The scope for rail to contribute towards meeting a number of these objectives is explored in detail in this report.
- 2.5 The Cotswolds is a well renowned area that creates a significant draw for visits to Gloucestershire and Oxfordshire. Developed by the Cotswolds Tourism Partnership, the ‘Cotswolds Tourism Destination Management Plan’⁵ also seeks to ensure that the Cotswolds is a vibrant year-round destination where visitors enjoy high quality, authentic experiences and tourism makes an increasing contribution to the economic, social and environmental sustainability of the local economy.

³ Cotswolds National Landscape 2023 research undertaken by Small World Consulting Study

⁴ Visit Gloucestershire Tourism Strategy, 2021-2024 Available at: <https://visit-gloucestershire.uk/uncategorized/gloucestershires-tourism-strategy-2021-2024/> Accessed: 23/03/2023

⁵ Cotswolds Tourism Destination Management Plan (2022-2025). Available at: [https://www.cotswolds.com/dbimngs/Destination%20Management%20Plan%20for%20Tourism%20Across%20the%20Cotswolds%20April%202014\(1\).pdf](https://www.cotswolds.com/dbimngs/Destination%20Management%20Plan%20for%20Tourism%20Across%20the%20Cotswolds%20April%202014(1).pdf) (Accessed: March 16, 2023).

- 2.6 Community Rail is all about connecting communities to the railway through activity based around local need, including partnerships, groups, organisations, social enterprises and volunteers. Community Rail Partnerships are community-based organisations that work in partnership with the rail industry and other interested bodies.
- 2.7 Community Rail organisations support the Government's Community Rail Strategy's main four pillars:
- Providing a voice for the community
 - Promoting sustainable, healthy and accessible travel
 - Bringing communities together and supporting diversity and inclusion
 - Supporting social and economic development
- 2.8 Gloucestershire Community Rail Partnership (GCRP) operates in Gloucestershire, bringing local grassroots community activity, groups and insights together with the rail industry to deliver a wide range of activities to improve access to sustainable transport and local rail, with a particular focus on how rail can be better used for leisure and tourism. GCRP's vision is a society where transport is inclusive, sustainable and better connects people.
- 2.9 The following sections of this document go on to consider the literature in support of promoting and facilitating rail-based tourism, particularly in Gloucestershire and the Cotswolds; summarise the main findings of local rail user surveys; provide a SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis, demonstrating the importance of rail for achieving sustainable leisure and tourism in Gloucestershire; undertakes a PESTLE analysis, drawing in the political and environmental context of rail for leisure and tourism; and finally draws some conclusions and makes recommendations for improving and promoting opportunities for rail-based leisure and tourism in Gloucestershire and the Cotswolds particularly

3. Literature Review

Tourism industry context

- 3.1 The development of railways in the nineteenth century was a critical landmark in the development of tourism travel⁶ It is widely accepted that in Europe "Thomas Cook pioneered mass travel, facilitated by the railway"⁷ when he sold package holidays that included travel by rail as a means of getting to the tourist destination.
- 3.2 Tourism has moved on somewhat since the nineteenth century. Today, tourism generates 10% of the world's GDP. Therefore, tourism is crucial to global economies, but, with the global climate crisis, the need for more sustainable tourism is vital. The UNEP and UNWTO's ⁸definition of sustainable tourism from 2005 "tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities" is still widely used today.
- 3.3 Garikapati, et al.⁹ found that "Compared to recent previous generations they [millennials] have been found to travel less, own fewer cars, have lower licence rates, and use alternative modes more". A study for the Department for Transport by Chatterjee et al¹⁰ found that the number of young people driving has reduced from 46% reporting driving a car in 1995-99 to 37% in 2010-14. The study considered a set of factors which might have contributed to this decline which included demographic situation, living situation, socio-economic situation, ICT usage, values and attitudes and transport and mobility. The report conclusions involve the idea that "changes in transport conditions have also played a role" in the decline of car driving by young people and that "transport policies and investments can shape long term trends". The decline in car driving by young people therefore presents opportunities for other modes of transport, including rail, which will be more successful with the backing of policies and investment.

⁶ Bhatia, A.K., 2002. Tourism development: Principles and practices. Sterling Publishers Pvt. Ltd.

⁷ Marson, D., 2011. From mass tourism to niche tourism. In Research themes for tourism (pp. 1-15). Wallingford UK: CABI.

⁸ UNEP and UNWTO, 2005, Making Tourism More Sustainable - A Guide for Policy Makers, p.11-12

⁹ Garikapati, V.M., Pendyala, R.M., Morris, E.A., Mokhtarian, P.L. and McDonald, N., 2016. Activity patterns, time use, and travel of millennials: a generation in transition? *Transport Reviews*, 36(5), pp.558-584.

¹⁰ Chatterjee, K., Goodwin, P., Schwanen, T., Clark, B., Jain, J., Melia, S., Middleton, J., Plyushteva, A., Ricci, M., Santos, G. and Stokes, G. (2018). Young People's Travel – What's Changed and Why? Review and Analysis. Report to Department for Transport. UWE Bristol, UK.

Sustainable tourism and sustainable rail

- 3.4 Tourism is highly vulnerable to climate change and at the same time contributes to the emissions of greenhouse gases which make significant contributions to global warming, particularly due to transportation and infrastructure¹¹. Lenzen et al.,¹² found that tourism accounted for 8% of global greenhouse gas emissions. At the COP26 UN Climate Change Conference, the Glasgow Declaration was officially launched as a plan for tourism to support the global commitment to halve emissions by 2030 and achieve net zero by 2050.¹³ In January 2022, Visit Gloucestershire became a signatory of the Glasgow Declaration on Climate Action in Tourism. Visit Gloucestershire devised four objectives for climate action. These include developing, promoting and supporting 'Go Car Free' initiatives across the county¹⁴. To encourage people to leave the car at home, GCRP has started to develop 'Taste for Travel' trails and experiences to "encourage visitors to see rail as part of the adventure, leave the station to explore nearby attractions and experience local businesses¹⁵"
- 3.5 John Elkington¹⁶ introduced the idea of a 'Triple Bottom Line', based on the results of a Corporate Social Responsibility (CSR) study. The idea was that economic, environmental and social factors needed to come together to enable businesses to act sustainably. In terms of rail, Johnson (2014)¹⁷ suggested that UK rail sector companies should be acting in a socially responsible and environmentally conscious manner and that expectations for social responsibility in rail are increasing. Meng, Douglas and Allan (2015) also spoke about the triple bottom line stating: "Urban development that promotes a transport-oriented environment has the potential to be an efficient strategy that can be the catalyst for social and economic renewal". Therefore, it is clear that there is, and will continue to be, increasing expectations for all corporations to be sustainable. Within the rail sector, environmental sustainability can help drive social and economic benefits.

¹¹ Grimm, I.J., Alcântara, L. and Sampaio, C.A.C., (2018) Tourism under climate change scenarios: impacts, possibilities, and challenges. *Revista Brasileira de Pesquisa em Turismo*, 12, pp.01-22.

¹² Lenzen, M., Sun, Y.Y., Faturay, F., Ting, Y.P., Geschke, A. and Malik, A., (2018). The carbon footprint of global tourism. *Nature climate change*, 8(6), pp.522-528.

¹³ One Planet Sustainable Tourism Programme (2021) – Glasgow Declaration: a Commitment to a Decade of Climate Action

¹⁴ Visit Gloucestershire Climate Action Plan (2022) (Accessed March 27, 2023)

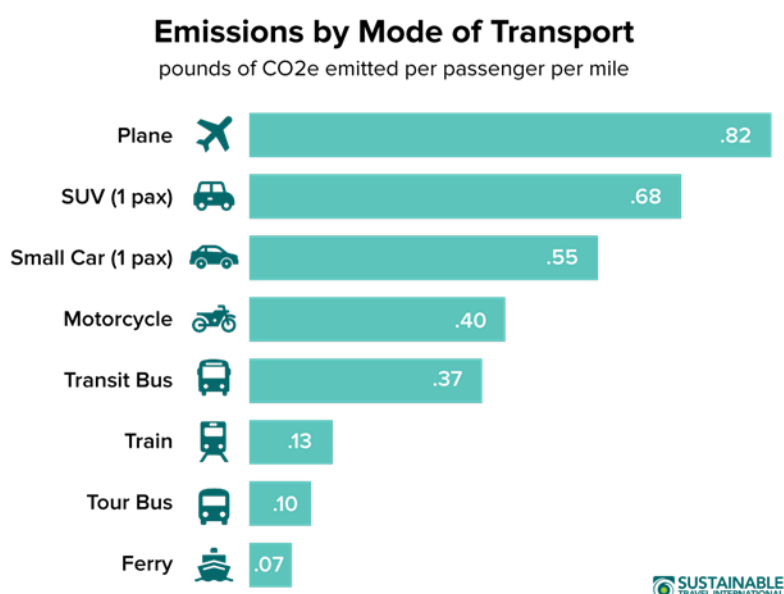
¹⁵ GCRP Taste for Trail Available at: <https://communityrail.org.uk/new-trails-to-give-passengers-a-taste-for-travel/> (Accessed March 27, 2023)

¹⁶ Elkington, J., 1994. Towards the Sustainable Corporation: Win-Win-Win Business Strategies for Sustainable Development. *California Management Review*, 36(2), pp.90-100.

¹⁷ Johnson, B., 2014. The Management of Corporate Social Responsibility in the UK Rail Sector. Open University (United Kingdom).

3.6 Sustainable Travel International¹⁸ calculated the average emissions by mode of transport shown in Figure 3-1. Just 0.13 pounds of CO₂e per passenger per mile is emitted by trains, with only tour buses and ferries emitting smaller amounts. The train, therefore, offers a clear opportunity for a more sustainable form of transport for tourism, especially when used as an alternative to aeroplanes or single occupancy cars. The Department for Transport’s Rail Environmental Policy Statement¹⁹ discussed the opportunities that rail can provide: “It is a fast, safe and reliable way of moving people and goods over long distances, in and around our city centres and internationally.”

Figure 3-1 Emissions by mode of transport



3.7 Not only is rail one of the smallest tourism transport emitters, but there is potential for the emissions from rail to be reduced further. In their Environmental Sustainability Strategy²⁰, Network Rail indicated that its vision is “to serve the nation with the cleanest, greenest mass transport” focussing on four core priorities:

- A low emission railway

¹⁸ Sustainable Travel International (2020) Carbon footprint of tourism, Available at: <https://sustainabletravel.org/issues/carbon-footprint-tourism/#:~:text=Today%2C%20transportation%20is%20tourism's%20main,and%20trains%20coming%20well%20behind.> (Accessed: March 13, 2023).

¹⁹ Department for Transport, (2021). Rail environment policy statement. Available at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1002166/rail-environment-policy-statement.pdf (Accessed: February 20, 2023).

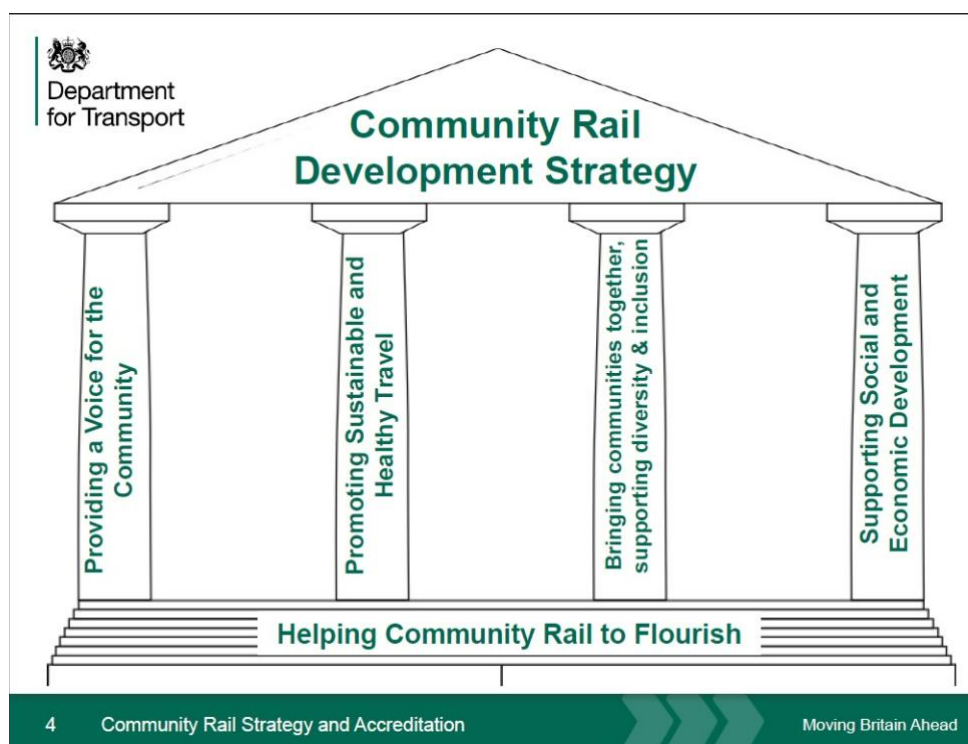
²⁰ Network Rail Environmental Sustainability Strategy (2020). Available at: <https://www.networkrail.co.uk/wp-content/uploads/2020/09/NR-Environmental-Strategy-FINAL-web.pdf> (Accessed: February 20, 2023).

- A reliable railway service that is resilient to climate change
- Improved biodiversity of plants and wildlife
- Minimal waste and sustainable use of materials

Community Rail

3.8 Community Rail is defined as a “grassroots movement working to engage communities in their local railway”²¹ and has been highlighted by the UK government as crucial for rail in this country. The government’s Community Rail Development Strategy²² picks out four key pillars of community rail - providing a voice for the community; promoting sustainable healthy and accessible travel; bringing communities together and supporting diversity and inclusion; and supporting social and economic development.

Figure 3-2 Community Rail Development Strategy four pillars



²¹ Department for Transport, (2020) Community rail, Available at: <https://www.gov.uk/government/collections/community-rail-lines> (Accessed: March 3, 2023).

²² GOV.UK (2020) Connecting communities with the Railways: The Community Rail Development Strategy. Available at: <https://www.gov.uk/government/publications/community-rail-development-strategy/connecting-communities-with-the-railways-the-community-rail-development-strategy> (Accessed: February 21, 2023).

- 3.9 Lowson²³ suggested that: "It is widely acknowledged that community rail partnerships, station friends – or station adoption – groups, and other rail-related community groups are delivering wide-ranging social benefits, to do with improved mobility and sustainable travel, community engagement and wellbeing, and social and economic development". There are clearly opportunities for railways to flourish with community rail at the forefront.
- 3.10 The Williams-Shapps Plan for Rail Report²⁴ detailed the government's plan and priorities and commitments to customers with regards to transforming Britain's railways. It included seven key promises to passengers and freight customers and 62 commitments of how they planned to do this. Commitment 13 is "community rail partnerships will be empowered to strengthen rail's social and economic impact".
- 3.11 In response to the Williams-Shapps report, the Community Rail Network²⁵ proposed that "Great British Rail should consider social value on an equal footing to commercial value when considering key issues to communities such as the use of disused/redundant station property".
- 3.12 Visit Gloucestershire is working in partnership with Gloucestershire Community Rail Partnership (GCRP)²⁶ having identified GCRP as the solution to supporting delivery on their Net Zero commitments.
- 3.13 Gloucestershire Community Rail Partnership has five key aims which align with the Department for Transport's four key pillars for community rail. These five key aims are:
- To contribute to the visitor experience and long-term economic sustainability of Gloucestershire
 - To improve accessibility to public transport
 - To improve the integration of transport through sustainable modes
 - To increase ridership profile and community involvement at all Gloucestershire's railway stations
 - To provide community insight to shape future proposals for rail investment and services across the county

²³ Lowson, R. (2021) The Value of Community Rail. Edited by J. Townsend. rep. Association of Community Rail Partnerships (ACoRP). Available at: <https://communityrail.org.uk/wp-content/uploads/2019/04/Acorp-Value-of-Community-Rail-090419.pdf>. (Accessed: February 21, 2023).

²⁴ Shapps, G. and Williams, K. (2021) Great British Railways: Williams-Shapps Plan for Rail. Available at: <http://www.gov.uk/government/publications/great-british-railways-williams-shapps-plan-for-rail>. (Accessed: February 20, 2023).

²⁵ Community Rail Network (2021) The Williams-Shapps Plan for Rail: A Consultation on Legislation to Implement Rail Transformation – Response from Community Rail Network. rep. Available at: <https://communityrail.org.uk/wp-content/uploads/2022/07/GBR-legislation-consultation-Community-Rail-Network-response.pdf> (Accessed: February 21, 2023)

²⁶ Gloucestershire Community Rail Partnership (2021). About us Available at: <https://www.gloucestershirecommunityrail.org/about-us> (Accessed: March 20, 2023).

- 3.14 Furthermore, GCRP has a cross-cutting aim to promote equality, inclusion and diversity across all of its activities.
- 3.15 GCRP in partnership with Visit Gloucestershire has developed Train Tripper²⁷; a website which allows anyone to plan a journey and an itinerary of leisure activities across the Gloucestershire area. It was funded by Great Western Railway and Cross Country and aims at encouraging sustainable tourism by promoting rail travel. Destination Management Organisations
- 3.16 Destination Management Organisations (DMOs) are 'local or regional tourist boards built around a visitor destination such as a town, city or county'²⁸. The de Bois review made 12 recommendations about the future of DMOs to best promote tourism, with half of the recommendations aimed at the UK government, four recommendations for Destination Management Organisations, one recommendation for Local Enterprise Partnerships (LEPs) and one for Local Authorities.
- 3.17 The Government response to the independent review of Destination Management Organisations in England²⁹ accepted some but not all the recommendations. The main way the government has responded is by committing to a pilot of the de Bois recommendation of a tiering model including multi-year core funding in a region of England. That will provide one top tier Local Visitor Enterprise Partnership (LVEP) or collection of LVEPs (known as a 'Destination Development Partnership'), the space and firm foundation to engage in a wide range of destination management type activities as well as prompt increased private sector investment" It suggests that "any area chosen should meet a range of criteria, including the ability to demonstrate close working across DMOs, local authorities and the private sector; evidence of visitor economy growth potential, including opportunities for improvement in tourism products, such as attractions and transport links; and potential to grow visitor numbers and spend."
- 3.18 Following the pilot of the de Bois tiering model, the government will review plans for how best to utilise the role of DMOs in tourism in the future.

²⁷ TrainTripper GCRP. Available at: <https://trainripper.co.uk/> (Accessed: March 27, 2023).

²⁸ de Bois, N., 2021. The de Bois review; an independent review of destination management organisations in England. Department for Digital, Culture, Media & Sport.

²⁹ Government response to the independent review of Destination Management Organisations in England. (2022) Available at: <https://www.gov.uk/government/publications/government-response-to-the-independent-review-of-destination-management-organisations-in-england/government-response-to-the-independent-review-of-destination-management-organisations-in-england> (Accessed: February 17, 2023).

- 3.19 Visit Gloucestershire is the DMO for Gloucestershire, with the Visit Gloucestershire Partnership having been formed in 2020. The Visit Gloucestershire Tourism Strategy³⁰ outlines a number of objectives under the categories of economy, natural and cultural environment, community and infrastructure and place. Within this it has aims such as “Supporting increased connectivity” and “Supporting transport and infrastructure development”. Therefore, improving transport is clearly a significant aim for Gloucestershire, due to the benefits that it can have for leisure and tourism thus enabling Visit Gloucestershire to meet other of its aims.
- 3.20 Following the de Bois Review and the government’s response, Visit Gloucestershire, Cotswolds Tourism, and local DMOs plan to submit a joint application (Cotswolds Plus) to the Local Visitor Enterprise Partnership (LVEP) programme. If successful, partners will be able to work together with Visit England to provide strong leadership and management of the destinations in Gloucestershire and will help to deliver national strategies and activities³¹.

Rural tourism

- 3.21 Gloucestershire is well served by rail services, providing links with all parts of Britain. There are stations in the main centres and in several locations in areas that are attractive to visitors. Therefore, opportunities for rural tourism are an important focus for GCRP, with the potential to support both residents and visitors to benefit from access to the countryside.
- 3.22 Gloucestershire is a predominantly rural county, with 42% of the population living in rural settlements and large market towns. The counties surrounding Gloucestershire are also semi-rural in nature and the Cotswolds Area of Outstanding Natural Beauty (AONB) stretches across parts of Bath and North East Somerset, Gloucestershire, Oxfordshire, Warwickshire, Wiltshire and Worcestershire.³² Designated in 1966, the Cotswolds AONB covers 2038km² and has a population of about 152,000.³³
- 3.23 The UNWTO³⁴ defines Rural Tourism as “a type of tourism activity in which the visitor’s experience is related to a wide range of products generally linked to nature-based activities, agriculture, rural lifestyle and culture, angling and sightseeing”.

³⁰ Visit Gloucestershire Tourism Strategy, 2021

³¹ VisitBritain (2023). Local Visitor Economy Partnerships (LVEP) open for applications Available at: <https://www.visitbritain.org/local-visitor-economy-partnerships-lvep-open-applications> (Accessed: March 24, 2023).

³² Cotswolds.com (2023) The official Cotswolds Tourist Information Site, Cotswolds. Available at: <https://www.cotswolds.com/> (Accessed: March 21, 2023).

³³ [Cotswolds AONB Fact File - Cotswolds National Landscape](#) (Accessed: April 14, 2023)

³⁴ UNWTO-United Nations World Tourism Organisation (2023) Rural Tourism. Available at: <https://www.unwto.org/rural-tourism> (Accessed: March 13, 2023).

- 3.24 There are lots of opportunities for rural tourism to succeed. Sharpley and Roberts³⁵ suggested that “countryside on the urban fringe enjoys a ‘strong day-visitor trade’; conversely, peripheral regions may attract lower levels of visitation although they may offer opportunities for more”. Further to this, Bridenhann and Wickens³⁶ argue that “the development of rural tourism routes stimulates co-operation and partnerships between local areas”. This indicates that Rural Tourism offers unique opportunities that should be utilised.

Access to Nature

- 3.25 GCRP aims to support equity of access and promote healthy travel options.
- 3.26 Access to green spaces is important for physical, emotional and mental wellbeing³⁷ with Frumkin et al³⁸ finding that “nature contact offers considerable promise in addressing a range of health challenges, including many, such as obesity, cardiovascular disease, depression, and anxiety”. Glover identified that England’s system of national landscapes should be a positive force for the nation’s wellbeing, but although landscapes are free and open to all they can seem exclusive and citizens often don’t feel welcome.³⁹

Access for all

- 3.27 GCRP seeks to improve access for all and promote inclusivity, with targeted actions as necessary to promote the interests of certain groups. Particularly relevant to Gloucestershire is addressing the needs of young people, as currently there is an issue of out-migration by this group.
- 3.28 A study by the University of Surrey⁴⁰ found that “British Black and Asian communities reported instances of racial harassment, microaggressions and/or discrimination while travelling, experiences which influenced their decision-making behaviour”. Access to

³⁵ Sharpley, R. and Roberts, L., 2004. Rural tourism—10 years on. *International Journal of tourism research*, 6(3), pp.119-124. cites Lane, B., 1994. What is rural tourism? *Journal of sustainable tourism*, 2(1-2), pp.7-21.

³⁶ Briedenhann, J. and Wickens, E., 2003. Tourism routes as a tool for the economic development of rural areas—vibrant hope or impossible dream? *Tourism management*, 25(1), pp.71-79.

³⁷ Barton J, Rogerson M. (2017) The importance of greenspace for mental health. *BJPsych Int*. Nov 1;14(4):79-81

³⁸ Frumkin, H., Bratman, G.N., Breslow, S.J., Cochran, B., Kahn Jr, P.H., Lawler, J.J., Levin, P.S., Tandon, P.S., Varanasi, U., Wolf, K.L. and Wood, S.A., (2017). Nature contact and human health: A research agenda. *Environmental health perspectives*, 125(7), p.075001.

³⁹ Glover, J. (2018) *Landscapes Review*, GOV.UK. Available at: <https://www.gov.uk/government/publications/designated-landscapes-national-parks-and-aonbs-2018-review> (Accessed: March 24, 2023).

⁴⁰ University Of Surrey (2022) Destinations and travel businesses must address concern about racial discrimination to capitalise on untapped market. Available at: <https://www.surrey.ac.uk/news/destinations-and-travel-businesses-must-address-concern-about-racial-discrimination-capitalise> (Accessed: March 3, 2023).

greenspaces should be equal for all but this is not currently the case. Booth⁴¹ reported that “People from Black, Asian and minority ethnic backgrounds account for about 1% of visitors to national parks despite making up about 14% of the general population”. There is clearly a need to ensure travel and access to green spaces including national parks is available and inclusive for all. About 20% of UK households do not have access to a car⁴² and therefore need to use other modes of transport to reach national parks and rail can meet this need and thus reduce the unequal access. ‘Getaway’ - Gloucestershire Community Rail’s prize-winning programme - addresses social inequalities allowing black/brown youth to access mental health and wellbeing benefits of being out in nature. The programme has taken over 250 young people on day trips by train, helping them build confidence and explore new places.

Tourists’ value of time

3.29 The amount of time taken to reach a destination is a key factor when travelling. Kim, Filimonau and Dickinson⁴³ found that “time savings from faster travel technology influence tourist behaviour changes”, i.e. the amount of time it takes to get somewhere is important to influencing what modes of transport tourists choose. They also suggest that there are three different groups of tourists:

- Busy explorers
- Travel time lovers
- Quality time seekers

3.30 Identifying the appropriate target group can help identify the needs of the tourists. Further to this, the Public Attitudes to Public Transport Report⁴⁴ found that “Around 1 in 3 people stated that improving journey times would make them more likely to support a scheme”. With trains not having to contend with traffic congestion, there are opportunities rail can provide to encourage a move away from other modes of transport.

⁴¹ Booth, R. (2019) England's national parks out of reach for poorer people – study, The Guardian. Guardian News and Media. Available at: <https://www.theguardian.com/environment/2019/feb/04/england-national-parks-out-of-reach-for-poorer-people-study#:~:text=More%20than%20nine%20in%2010,14%25%20of%20the%20general%20population> (Accessed: February 14, 2023).

⁴² <https://www.gov.uk/government/statistics/national-travel-survey-2021/national-travel-survey-2021-household-car-availability-and-trends-in-car-trips>

⁴³ Kim, S., Filimonau, V. and Dickinson, J.E., (2021). Tourist perception of the value of time on holidays: implications for the time use rebound effect and sustainable travel practice. *Journal of Travel Research*, 62(2), pp.362-381.

⁴⁴ Copper and County Councils Network (2022) Public Attitudes to Public Transport Report

Literature review findings

- 3.31 The literature highlights the importance of leisure and tourism for achieving economic and social well-being. Rail can offer more environmentally sustainable means of travel for people to appreciate the countryside and to access tourist attractions.
- 3.32 Rail offers access to leisure and tourism for a broad cross-section of society, not just those who have access to a private car.
- 3.33 Increasing rail travel for leisure and tourism will also contribute to tackling the climate emergency by offering an attractive travel alternative which is less polluting. Taking a train instead of a car for medium length distances, for example, would cut emissions by approximately 80%, as National Rail produces just 41g of CO₂e per passenger km compared with a medium petrol car which produces 192g of CO₂e per passenger km or a medium diesel car which produces 171g of CO₂e per passenger km⁴⁵.

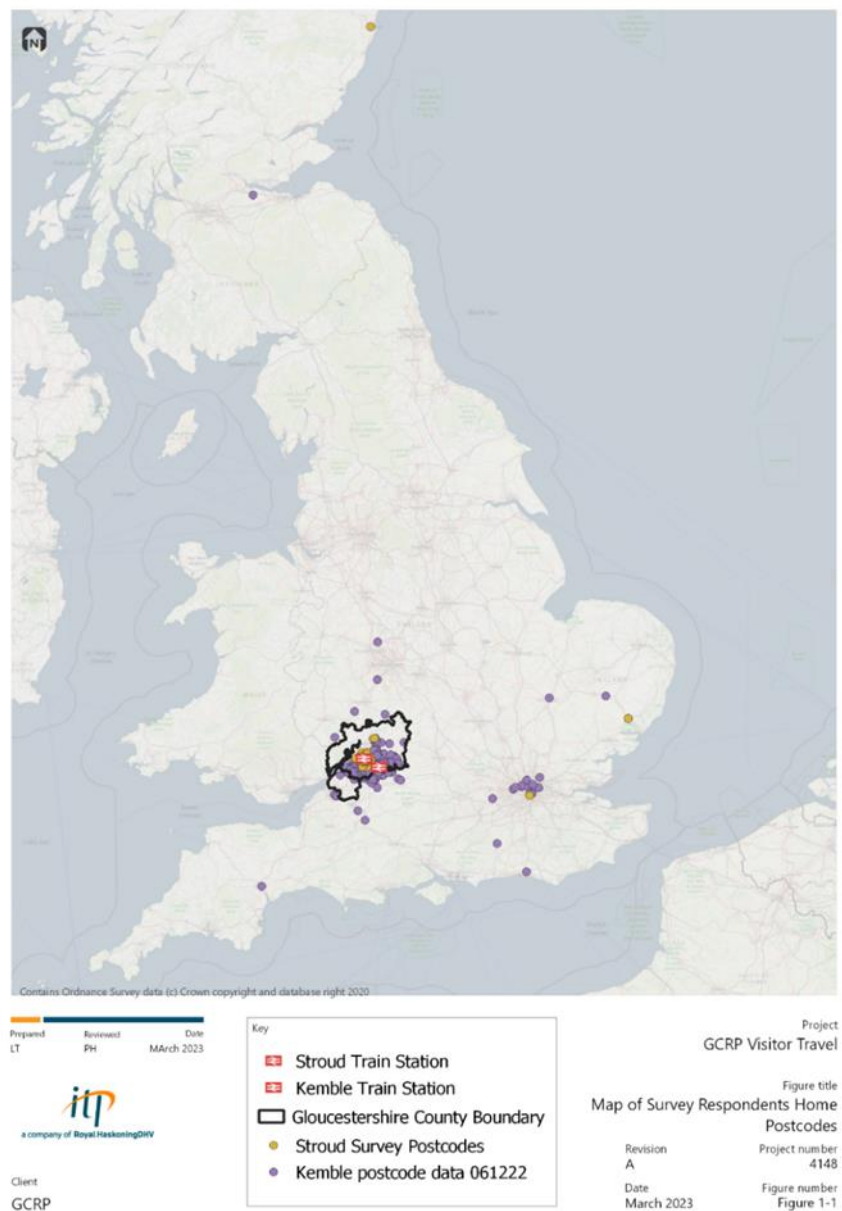
⁴⁵ Ritchie, H. (2020) Which form of transport has the smallest carbon footprint? Our World in Data. Available at: <https://ourworldindata.org/travel-carbon-footprint> (Accessed: March 21, 2023).

4. Gloucestershire Stations Passenger Survey

- 4.1 To develop and promote the role of a rail line in an area it is important to understand how it is used. GCRP, GWR, Cotswold District Council and Stroud Town Council were interested in understanding more about people's experience, behaviour and perceptions of using Stroud and Kemble stations. GCRP initially carried out self-completion user surveys at Stroud station.
- 4.2 Later in 2022, Cotswold District Council commissioned a similar survey at Kemble station. As well as to build wider understanding of how the station is used, the survey informed a study into improving public transport on the Cirencester – Tetbury corridor, particularly links to/from Kemble station.
- 4.3 Stroud and Kemble stations are well-located in Gloucestershire for linking to popular tourist destinations in the area, including:
- Westonbirt Arboretum, which attracts 550,000 people per year
 - Cotswold Water Park, consisting of an area of 110km² of lakes, which attracts 450,000 users every year, generating over 1 million visits⁴⁶.
- 4.4 With the majority of the visitors to these attractions currently arriving by car, the proximity of Stroud and Kemble stations to such attractions meant conducting surveys at them was useful for understanding existing visitor travel patterns and gaining insights into rail's potential as an alternative to the car.
- 4.5 Whilst providing useful insights into travel for all purposes, the surveys took the opportunity to explore people's use of rail for leisure and tourism in more detail. The analyses from these surveys, therefore, support the important links between rail and leisure, offering further evidence for this research.
- 4.6 Surveys at Kemble and Stroud Stations were conducted in 2022. The Stroud survey took place between June and August 2022 and the Kemble survey gathered responses between September and November 2022. The Stroud Survey collected 200 responses and the Kemble survey collected 502 responses.
- 4.7 Figure 4-1 shows the locations of the home postcodes of survey respondents from both surveys. Most respondents were local to the two stations, but there were also respondents from London as well as central and southern England.

⁴⁶ Cotswold Water Park (2022) Available at: <https://waterpark.org/about/what-is-it/#:~:text=Since%201967%2C%20when%20the%20whole,visitors%20come%20here%20every%20year>. Accessed 5 April 2023

Figure 4-1 Home postcodes of Stroud and Kemble Survey respondents



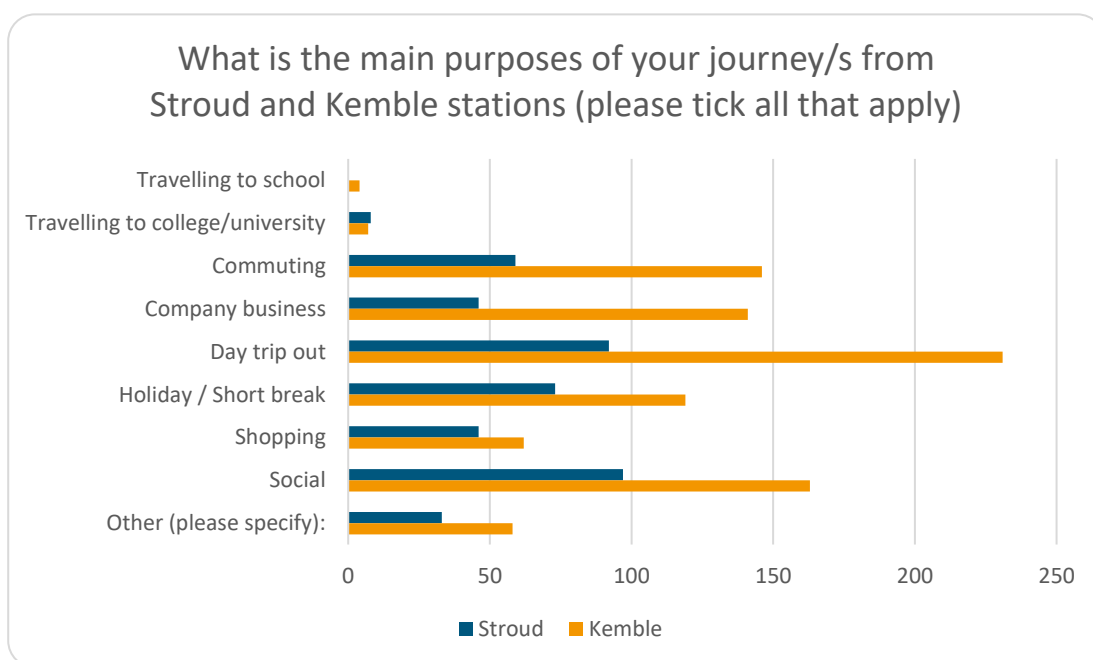
Journey purpose

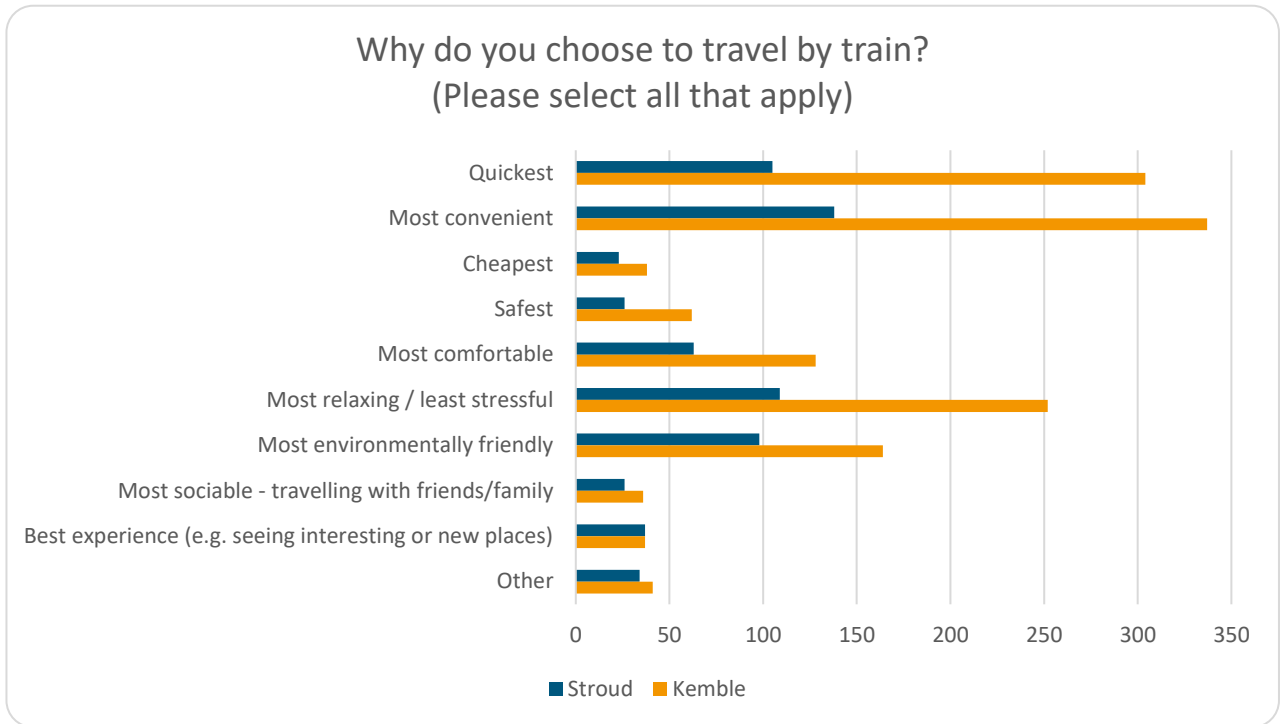
- 4.8 Among the journey purposes reported by survey respondents at Stroud and Kemble stations, tourism featured strongly. 'Day trip out' was the most popular reason for making journeys from Kemble station (46% of respondents) and the second most popular reason for making journeys from Stroud station (45%). In addition, over a third of respondents at Stroud and almost a quarter of respondents at Kemble made journeys from the respective stations for 'holidays/short breaks'.

4.9 This means that a good proportion of the journeys from the stations were tourism related. However, the results do not indicate where the day trips and short breaks were being taken.

Reasons for travelling by train

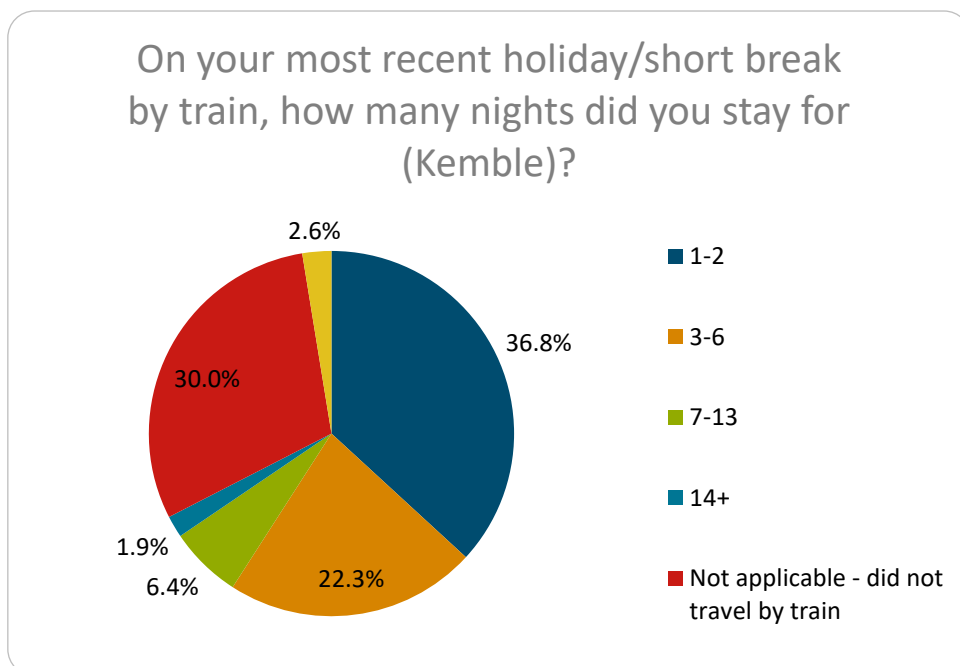
4.10 When answering the survey at Stroud, 55% of people indicated they chose to travel by train because it is 'Most relaxing/least stressful' and 49% chose 'Most environmentally friendly'. For Kemble, 51% of people chose 'Most relaxing/least stressful' and 33% chose 'Most environmentally friendly'. Also, 19% of people at Stroud and 7% of people at Kemble indicated they travel by train because it is the 'Best experience (e.g. seeing interesting or new places)'. This suggests that people's reasons for travelling by train correspond with the research of reasons why rail should be used for tourism.

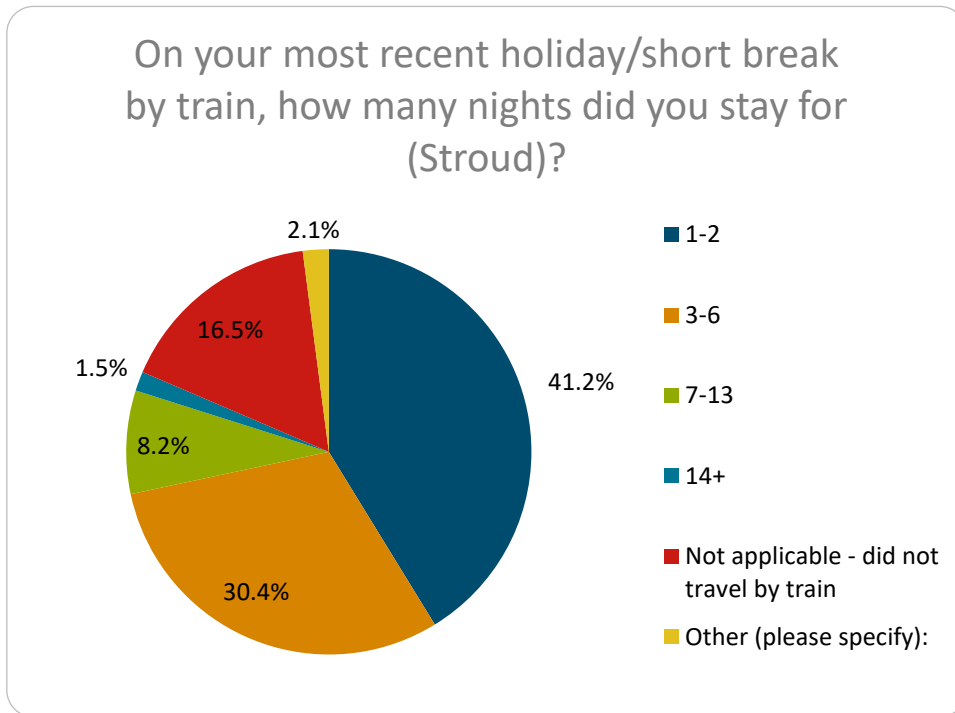




Most recent holiday (by train) number of nights

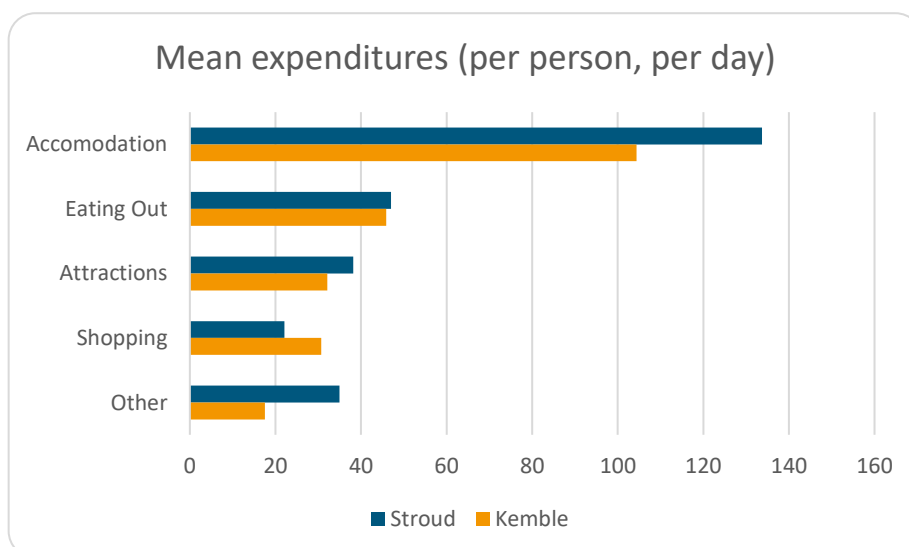
- 4.11 41% of Stroud respondents and 37% of Kemble respondents stayed for 1-2 nights on their most recent holiday/short break by train. Stays of 3-6 nights were the next most popular length of stay. This suggests that the provision and promotion of rail for tourism should focus on shorter holidays/breaks.
- 4.12 It is worth noting that the question asked "On your most recent holiday/short break by train, how many nights did you stay for?" provides no indication whereabouts the break was taken.





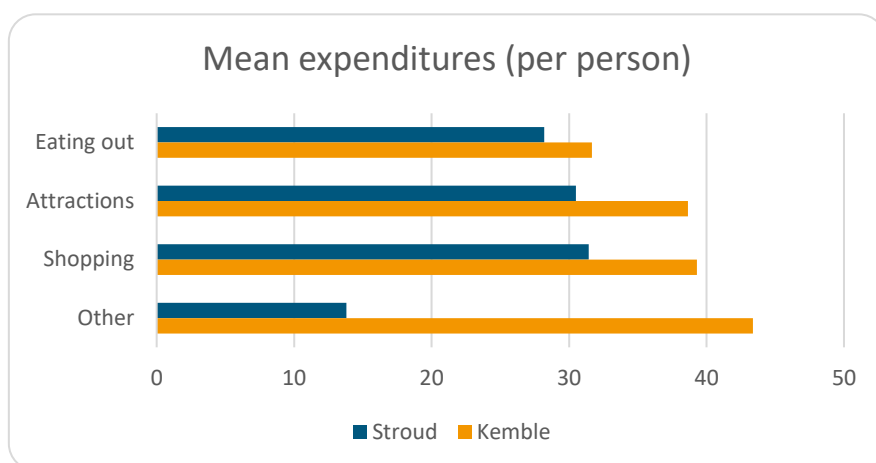
Most recent holiday (by train) spending

4.13 The surveys asked people "On your most recent holiday/short break by train, approximately what did you spend on: Accommodation, Eating out, Attractions/ experiences, Shopping, Other". Respondents indicated that accommodation was the highest expenditure at about around £133 and £105 per person per day respectively. The averages in the graph below are useful as guidelines for how much people spend when travelling but cannot be used as a definite level of spend in the south Gloucestershire area.



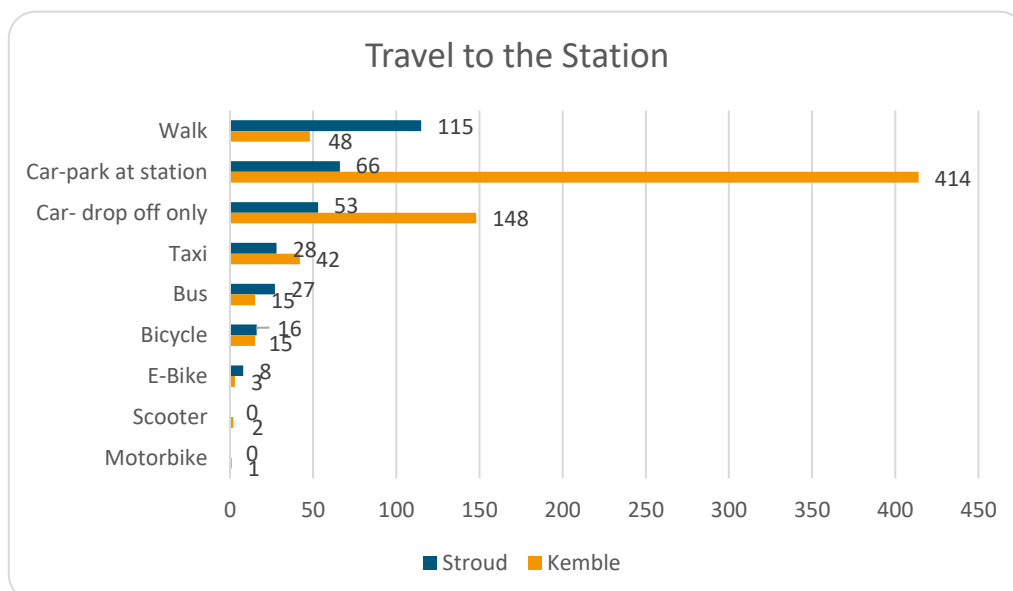
Day trip (by train) spending

4.14 The question asked: "On your most recent day trip by train how much did you spend on: Eating out, Attraction/ experiences, Shopping and Other". Similarly, to the holidays/short breaks this meant there was not specification of where the day trip was. However, the highest expenditures were on shopping, alongside a particularly high "Other" category for Kemble due to one person spending £300 on a medical. Therefore, all areas of tourism should be encouraged as spending was not found to be particularly focused on one type of spending.



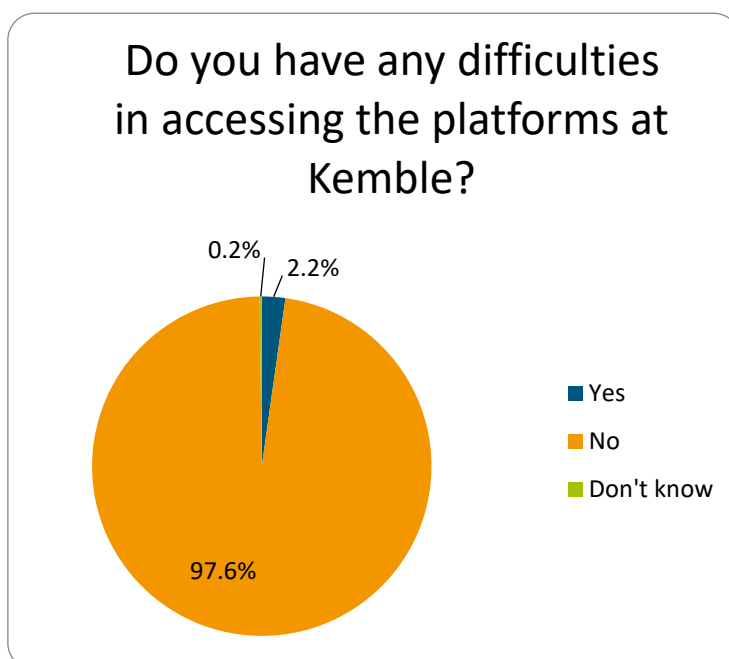
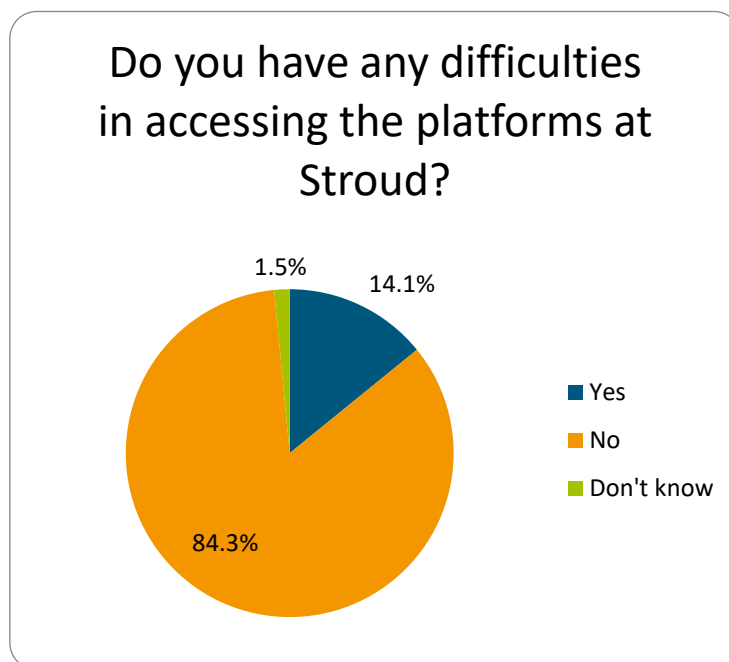
How respondents travelled to and from the stations

4.15 At Stroud station, there was a mix of active travel, public transport and car usage for travelling to the station. For Kemble station, there was a much bigger proportion of almost 60% of people driving to/from the station, highlighting its isolated location. This suggests there is an opportunity to improve public and active transport usage around Kemble station, to help people travel more sustainably.



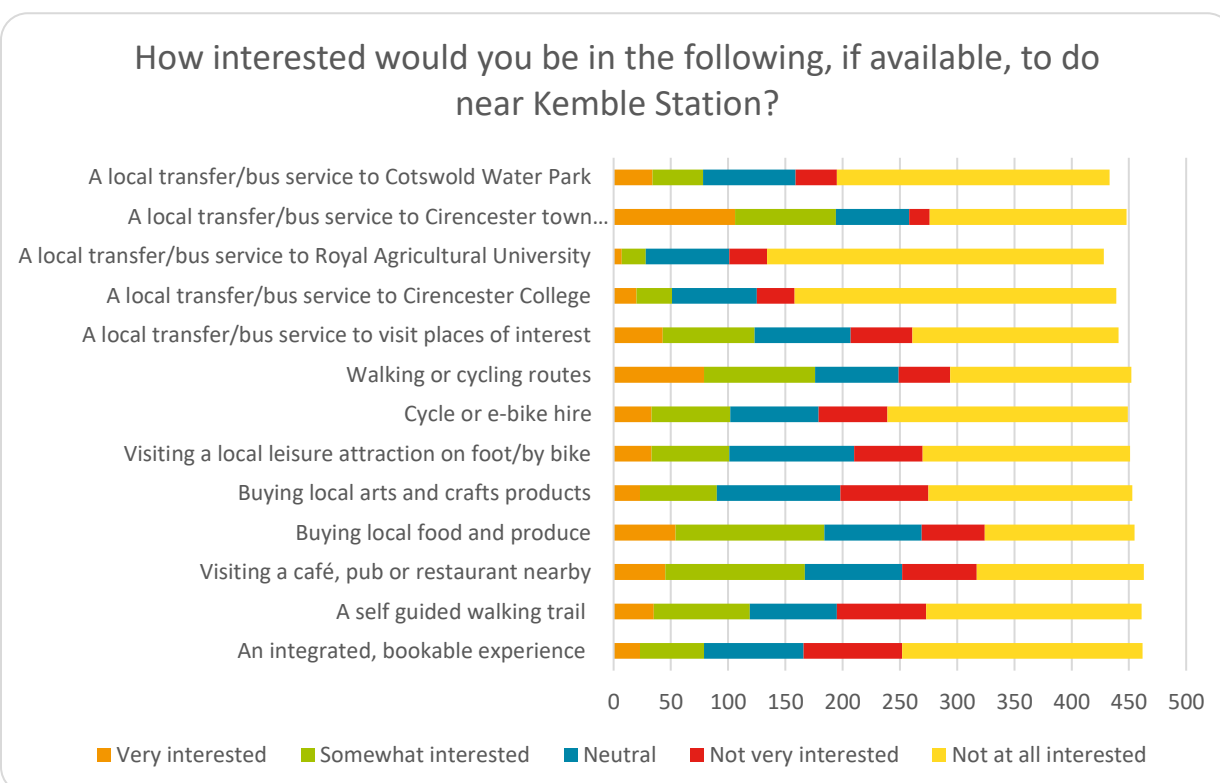
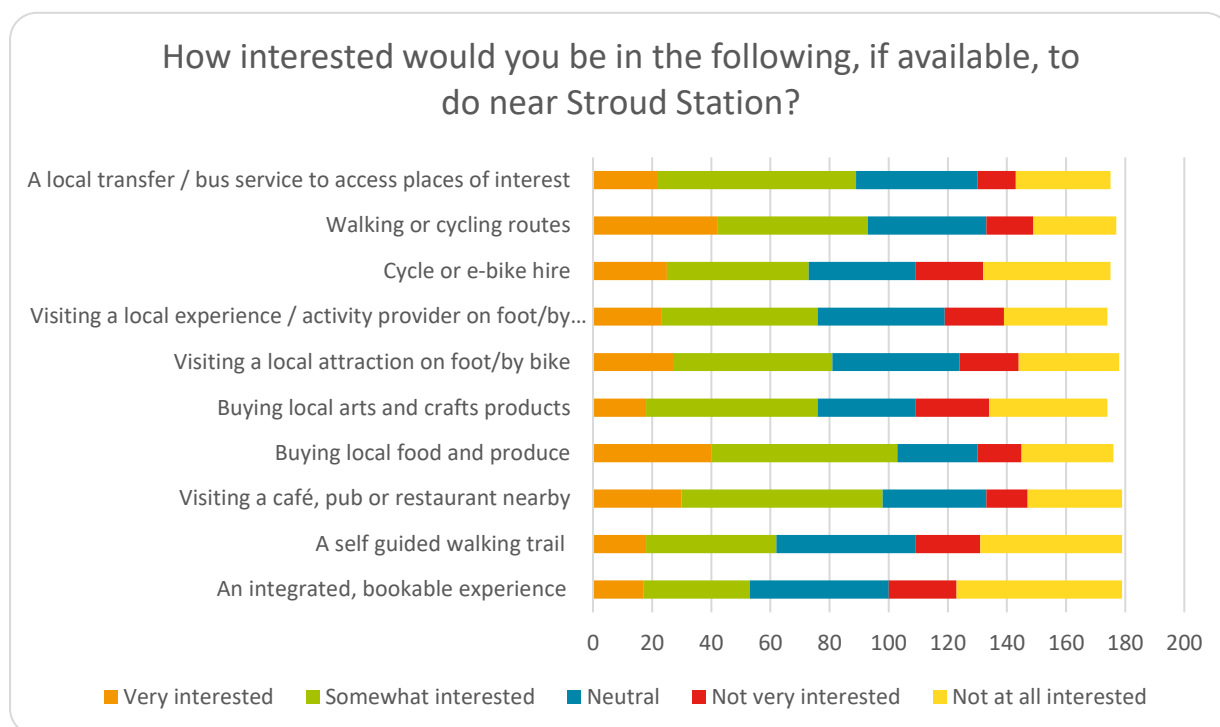
Accessibility of the stations

4.16 14% of people indicated they had difficulties accessing the platform at Stroud station and 2% of people indicated they had difficulties at Kemble station. This shows there is improvement to be made about station accessibility to ensure nobody is excluded from being able to travel by train, which presents an opportunity for increasing the number of people who choose to rail as their mode of transport.



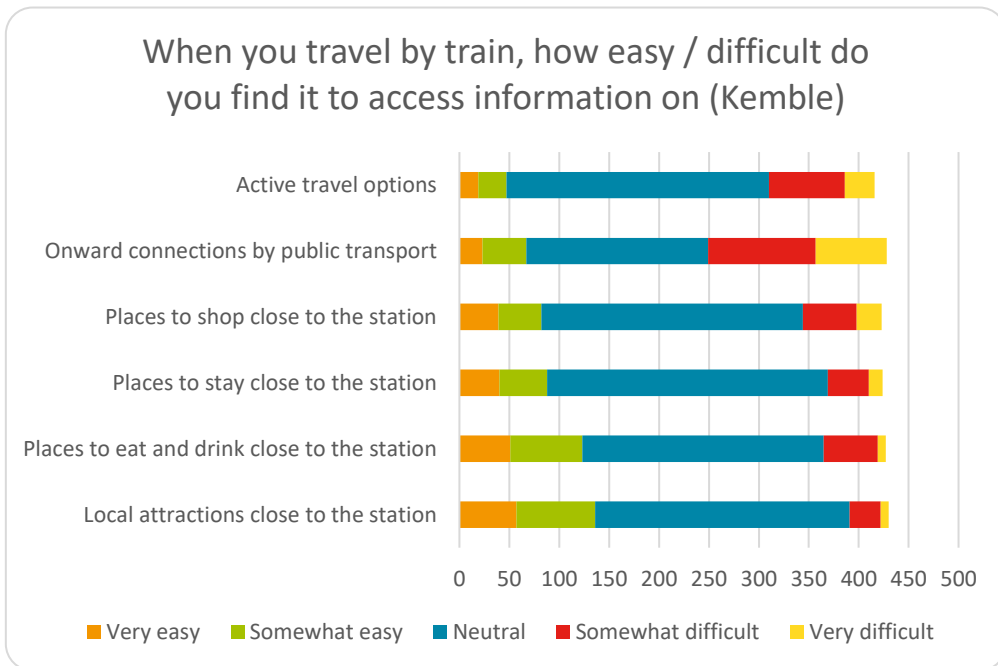
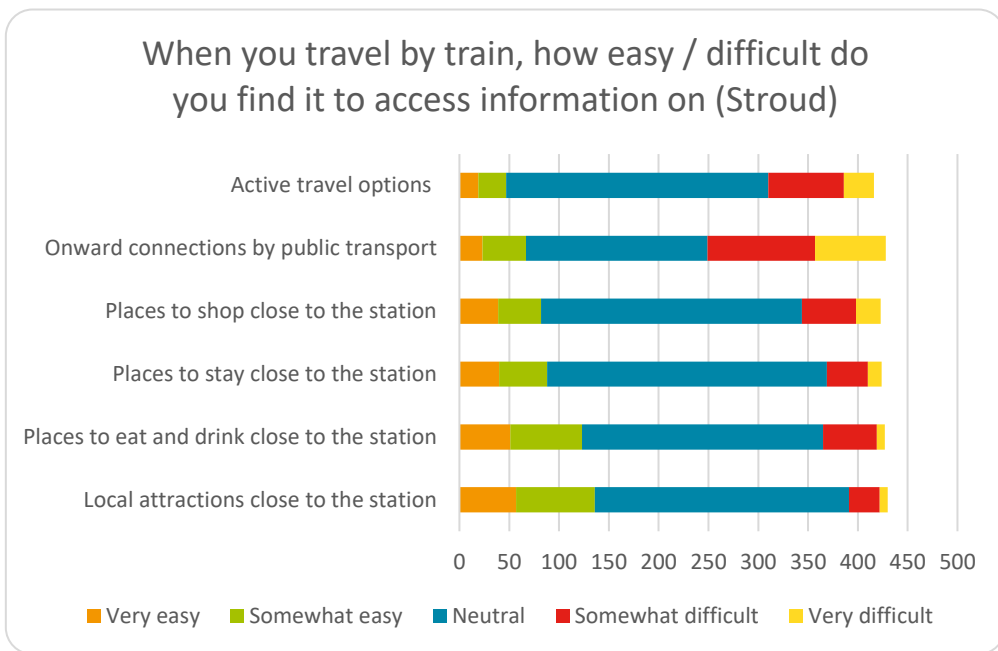
Interest in tourism activities near the station(s)

4.17 Generally, the most interest was around walking or cycling routes, visiting nearby cafés, pubs, restaurants and buying local food and produce across both stations. There was also quite a lot of interest in a local transfer / bus service to Cirencester town centre and hospital from respondents at Kemble station, again suggesting the public transport connections go be improved around Kemble station.



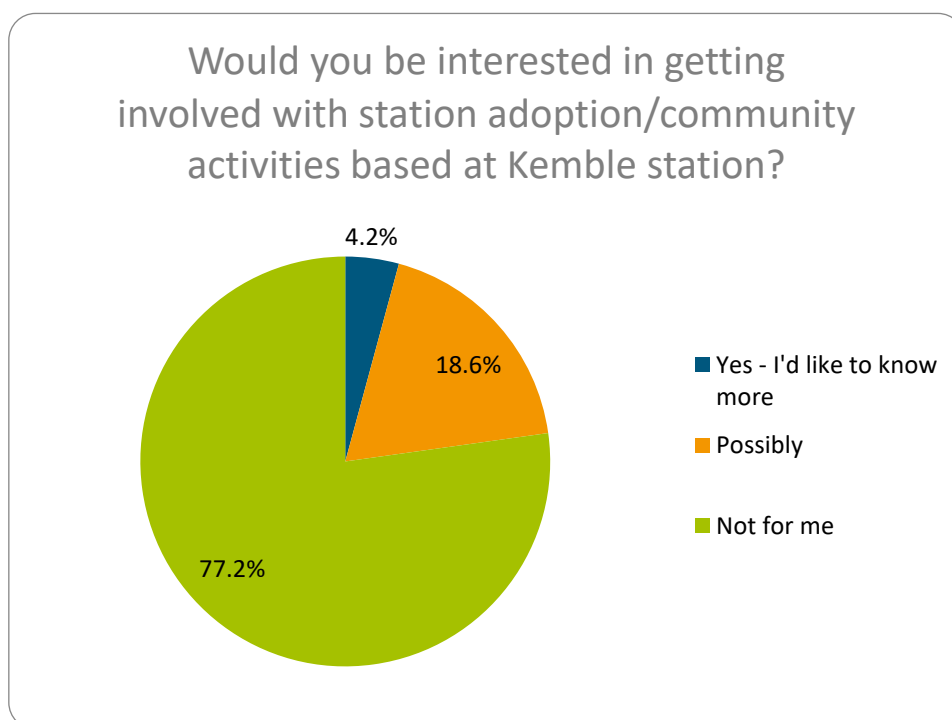
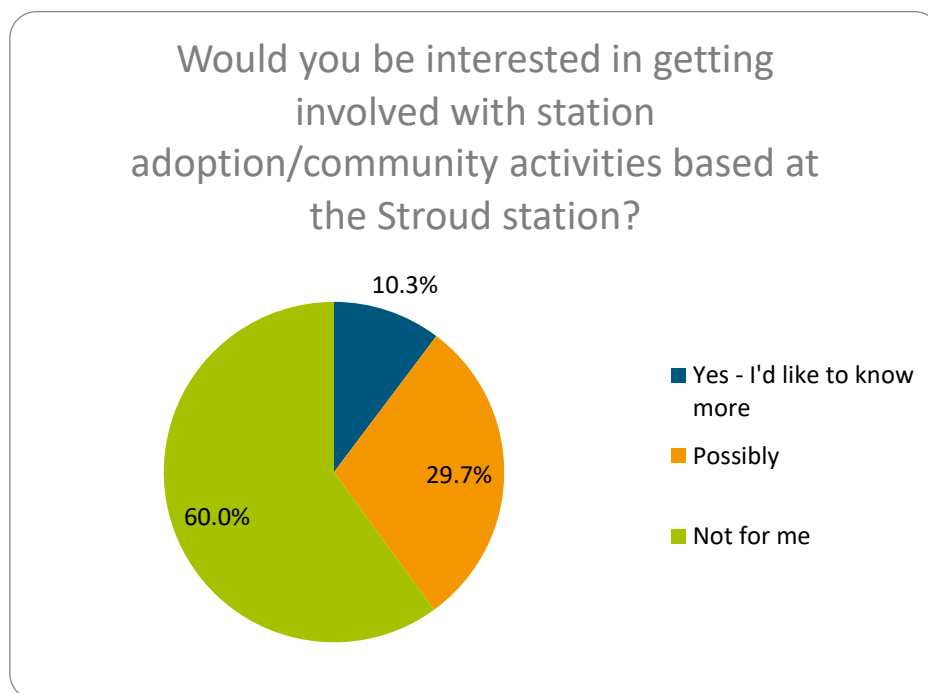
Ease of accessing information

4.18 Survey respondents at both Stroud and Kemble stations indicated that the most difficult information to access when travelling by train was information about onward connections from the station by public transport. Therefore, to promote sustainable travel, information about public transport should look to be improved with also the consideration of increasing public transport provision.



Interest in being involved with the stations

4.19 10% (19 people) of respondents at Stroud and 4% (20 people) at Kemble suggested they would be interested in getting involved in station adoption/community activities. This shows there is some interest by people at getting involved which is positive for community rail.



Summary of survey findings

- 4.20 The main reasons for travelling by train were for speed, convenience and as a more relaxing and less stressful form of travel. These should therefore continue to be highlighted as benefits of travelling by train.
- 4.21 There are opportunities to link up with other modes of transport particularly buses, walking and cycling as car is the predominant means of getting to the stations. By making information more easily available, onward connections by public transport from the stations can be encouraged.
- 4.22 There is interest in a wide variety of tourist activities, especially around Stroud station.
- 4.23 Improving station accessibility should be a priority especially at Stroud station, which would encourage further usage of the station.
- 4.24 Short breaks were more common than longer breaks when travelling by train according to the surveys. As longer trips encourage more spending, they have the potential to benefit the local economy more and should be encouraged via initiatives such as better deals for longer accommodation bookings, with accommodation currently being the biggest tourist expense. However, eating out also averaged over £40 per person per day so is a clear economic opportunity. On day trips, expenditure was split more evenly across eating out, attractions and shopping. Therefore, one aspect of tourism shouldn't be particularly advertised over others. Encouraging people visiting on day trips particularly to large tourist attractions like the Cotswolds Area of Outstanding National Beauty to stay longer and explore more local attractions and businesses could encourage further spending.

Further enquiry needs

- 4.25 The survey posed some useful questions but didn't clearly differentiate between respondents who lived locally to the stations and those who were visiting. The question regarding journey purposes, for example, asked about the purpose for the journey from the station, thus indicating that it was aimed at people travelling away from the station. For future research it would be helpful to survey those arriving at the stations, to potentially pick up more tourists visiting Gloucestershire.
- 4.26 It would also be useful for future research to investigate topics such as spending habits on a more local basis, so that knowledge of tourist spending in Gloucestershire could be gathered.
- 4.27 It would also be worth future surveys being conducted outside of the stations to get a wider understanding of tourist travel behaviour. The existing surveys will have picked

up people travelling by train currently but to encourage a mode switch there needs to be engagement with, and understanding of, other groups such as visitors travelling by car to the area for leisure and tourism purposes.

5. SWOT Analysis

- 5.1 This SWOT analysis considers the strengths and weakness of rail travel for leisure and tourism, based on the considerations in this study and particularly in the context of Gloucestershire.

Table 5-1: SWOT Analysis

Strengths	Weaknesses
Direct rail link from London; and connections with trains to/from all parts of Britain	Potential unreliability of trains, delays or cancellations (recently due to strikes)
Trains are not as affected by traffic congestion so can be quicker than other modes of travel such as cars/buses	Price of train tickets, plus price variability across operators and routes
Visitors don't have to arrive at and depart from the same station. Opportunities for station-to-station walks.	Rail is not a door-to-door mode of travel
Ability to look out of the window and appreciate the views and countryside	Lack of connectivity via public transport of Gloucestershire train stations to tourist hotspots
Ability to use the travel time effectively and do other things whilst on trains, such as reading a book, social media and enjoying refreshments.	Lack of flexibility with some tickets
Station infrastructure is popular	Limited space on board trains for people/luggage
Rail is an option for tourism for those one in five households that do not have access to a car	
No pressures of driving a car or encountering traffic congestion.	
Opportunities	Threats
Increasing environmental benefits of rail over other modes - global and local UK emission targets and increasing awareness and demand for lower emission transport from customers	The cost-of-living crisis is likely to further increase energy prices which will impact rail fares

Improved technologies - Network Rail is partnering with eight UK universities as part of the UK Rail Research and Innovation Network to create innovation and accelerate new technologies in rail.	Recovery of international travel post-Covid could result in less domestic tourism especially with the lack of government investment in rail.
Domestic travel in the UK increased as a result of Covid-19 pandemic	
Rail is an inclusive and accessible mode for most of the population	
Leisure journeys by rail have recovered more than commuter journeys; rail operators report strong usage at weekends	
Inclusion of Oxfordshire in a Community Rail Partnership will further support the interest in tourism by rail and give greater linkage between rail access to the Cotswolds AONB	

How to utilise strengths and opportunities

- 5.2 There are several pre-existing benefits of using rail for leisure such as avoidance of road traffic congestion, health and wellbeing benefits and flexibility, as well as opportunities that can further enhance these strengths such as increasing environmental benefits, improved inclusivity and accessibility and future rail technology. The benefits of rail over other modes of transport need to be better advertised. There could, for example, be a webpage detailing benefits on the Visit Gloucestershire’s website rather than just a link to Gloucestershire Community Rail Partnership when the user clicks on ‘travel’. Similarly, Visit England’s Sustainable Transport webpage⁴⁷ has information on sustainable transport in areas of the country that visitors can use public transport to get around easily so this could be a good way of promoting sustainable tourism in Gloucestershire.
- 5.3 Additional partnership working with rail companies and stakeholders could emphasise and build upon the mutual benefits of rail for leisure as well as the benefits that leisure travel can provide for rail. This could include investigating how innovative technologies can be utilised to improve rail further and therefore make it more attractive to all. One

⁴⁷ Visit England Sustainable Transport Available at: <https://www.visitengland.com/plan-your-visit/sustainable-transport>
 Accessed: 5th April 2023

such technology that is being used in Gloucestershire is TrainTripper which is an online service that helps visitors plan their itinerary including trains for exploring Gloucestershire. However, more innovative technologies could further improve rail for the leisure market in the future.

- 5.4 Stations in Gloucestershire should continue to be maintained to a high standard so that they remain popular and encourage return visitors by rail.

How to overcome weaknesses and threats

- 5.5 Marketing of rail travel could be adapted to highlight the flexibility that not travelling door to door can provide. This could be enhanced by the potential to introduce a two-trip tourist rail ticket which would be valid for a period of time (e.g. a month) for travel between a range of stations in Gloucestershire.
- 5.6 Overcoming the issues which rail strikes present is challenging but could be explored through combined rail and accommodation deals. In the same way as package holidays include flights with destination accommodation, there is an opportunity to combine rail travel and accommodation bookings in Gloucestershire. This would help combat disruption and associated uncertainty which cancelled trains can cause, preventing people from relying on rail travel.
- 5.7 The current economic situation is a threat to leisure travel in general but particularly rail travel. One option for counteracting that is integrated ticketing. For example, an integrated ticket which combines rail travel with entry tickets into local attractions could help to encourage people to visit Gloucestershire.
- 5.8 It is important that tourist attractions themselves are fully involved in promoting more sustainable travel options and consider how they can facilitate visitors getting to their site from the nearest rail station. Equally, they can encourage travel by alternatives to the car by offering those who choose more sustainable methods discounted entry or special offers in the café.
- 5.9 Continued marketing campaigns such as TrainTripper and 'Taste for Travel' could be used to further encourage the ways in which rail can be utilised for leisure and tourism in Gloucestershire as well as combining with websites such as Visit Gloucestershire which can be used to promote everything Gloucestershire has to offer to attract new tourists to counteract the opening up of international travel post-covid.
- 5.10 'Delay Repay' is a national scheme that train companies use to compensate passengers for unexpected delays and cancellations to their services. This scheme should be

advertised as a way of minimising the negative financial impact on passengers of cancelled and delayed trains.

6. Pestle Analysis

Political

- 6.1 Brexit presents a legal barrier to the freedom of travel for EU members into the UK and UK citizens into the EU. This could create a challenge in making it more difficult for EU tourists to travel to destinations within the UK such as Gloucestershire. It may, however, encourage more UK domestic tourism which could increase the number of tourists visiting Gloucestershire.
- 6.2 Government stability is a major factor in the success of tourist destinations. Linking to the country's economic stability, the actions of the UK government will influence whether international tourists decide to visit the UK and areas including Gloucestershire.

Economic

- 6.3 Stability of the economy will influence international tourists' decisions on whether to visit the UK. The stability of the economy directly influences exchange rates - when the GBP falls in comparison to other currencies, it makes the UK more affordable to travel to and vice versa.⁴⁸
- 6.4 Rates of inflation and the associated cost of living crisis reduce the amount of disposable income people have, leading to less leisure and tourism overall and less spending when people do travel. This could present opportunities for domestic tourism if it is seen as more affordable.

Social

- 6.5 Society is becoming more aware and conscious of the environmental impact of travel. This can create opportunities for sectors such as rail as people switch transport modes for leisure and tourism.
- 6.6 Population growth (in the UK) and globally means there is likely to be a resultant increase in the number of tourists which could be beneficial for areas including Gloucestershire.

⁴⁸ VisitBritain (n.d.) Impact of exchange rate on tourism to Britain Report. Available at: <https://www.visitbritain.org/new-research-impact-exchange-rate-tourism-britain> (Accessed: March 21, 2023).

Technological

- 6.7 The availability and reach of Information Communications Technology (ICT) means that access to information regarding rail and leisure and tourism is becoming easier and cheaper. marketing, for example, can be targeted on social media and websites rather than physical marketing or television advertising campaigns which are traditionally more expensive.
- 6.8 Technological improvements can also make rail travel more attractive to customers with increased comfort and facilities such as on-board Wi-Fi and charging points.
- 6.9 Advancements in rail-specific technology such as ticket apps, detection of track failure and improving signalling can make rail travel safer, quicker and easier for customers.

Legal

- 6.10 The Disability Discrimination Act and subsequent Equality Act and the government's Access for All programme⁴⁹ means that stations are required to be more accessible for disabled or elderly passengers or passengers with pushchairs or large baggage. Removing physical barriers to rail travel will help make it an option to groups of people who might have previously been excluded.
- 6.11 The Public Services (Social Value) Act⁵⁰ requires people who commission public services to think about creating wider social, economic and environmental benefits and means that social value is evaluated for major contracts. Community Rail Partnerships are well positioned to manage the creation of all aspects of social value within rail.

Environmental

- 6.12 Transport pollution (as detailed above) is a huge contributor to greenhouse gas emissions, but rail is far less polluting than other modes of transport, particularly airplanes which are used for leisure and tourism and thus the opportunity for mode switch is high. The electrification of rail means the UK's rail network is working to becoming even more sustainable as trains switch from being diesel to electric.
- 6.13 Climate change poses specific threats to rail travel such as increasing the risks of track buckling, frozen points/crossings and track floodings. These challenges need to be

⁴⁹ Transport, D.for. GOV.UK (2019) Access for all: Funding to improve accessibility at rail stations. Available at: <https://www.gov.uk/government/collections/access-for-all-programme> (Accessed: March 23, 2023).

⁵⁰ GOV.UK (2012) Public Services (Social Value) Act. Available at: <https://www.legislation.gov.uk/ukpga/2012/3/enacted> Accessed: 5th April 2023

mitigated against the process of which is being started through Network Rail's Weather Resilience and Climate Change Adaptation Plan⁵¹.

- 6.14 Climate change also presents threats to local businesses from increasing natural disasters/events such as flooding and heatwaves.
- 6.15 The climate crisis does, however, provide opportunities for rail and tourism with people changing behaviours to travel more sustainably which is a priority for Gloucestershire.

⁵¹Network Rail (2017) Weather resilience and climate change action plan. Available at: <https://www.networkrail.co.uk/wp-content/uploads/2021/11/Asset-Management-WRCCA-Plan.pdf> (Accessed: March 23, 2023).

7. Conclusions and Recommendations

- 7.1 Although the post-covid rail market is heavily skewed towards leisure travel according to GWR, rail remains underutilised for leisure and tourism travel. Rail travel could be significantly increased across Gloucestershire to reduce the transport-related greenhouse gas emissions associated with the large quantity of tourists that visit Gloucestershire and the Cotswolds Area of Outstanding Natural Beauty.
- 7.2 Gloucestershire Community Rail Partnership has the grassroots knowledge and experience which, combined with key industry stakeholder expertise, will help to improve the ways in which leisure and tourist travel is managed in Gloucestershire.
- 7.3 Improving the connectivity of train stations in Gloucestershire to local centres and visitor destinations by other sustainable modes of transport is key to having an integrated network that facilitates car-free travel. This means having distinct walking and cycling routes and opportunities for bike rental. In addition, bus routes which serve train stations and coordinate with train timetables is essential. Up-to-date information about onward travel connections should be easy to access and widely publicised at stations as well as online for advance journey planning.
- 7.4 Rail pricing and ticketing offers should be combined with other leisure and tourism offers to make rail an easy, convenient and cost-effective option for tourists. Offers could include onward travel from train stations, attraction tickets or even accommodation. Settle-Carlisle Community Rail Partnership, for example, have organised events such as stargazing at Ribbleshead which were scheduled to coordinate with the rail timetable⁵² Similar initiatives should be pursued in Gloucestershire to actively encourage rail-based leisure and tourism in the county.
- 7.5 Critical to encouraging more sustainable travel behaviour amongst visitors is the provision of information to potential visitors at the time of planning their trip, so there is no doubt that making the visit without a car is not only possible, but desirable. This needs all stakeholders to ensure that they promote visits by alternative means, highlighting the possibilities and incentivising their use wherever possible. Furthermore, promoting the visit as a package of travel and tourist-interest (itineraries) will help provide confidence and reassurance, including travel options, days out ideas, walks, tours, discounted entry and special offers.

⁵²Settle Carlisle Railway 2020 Available at: <https://settle-carlisle.co.uk/community-rail/> (Accessed March 27th 2023)

Appendix A

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Hannah McDonnell
Executive Director
Gloucestershire Community Rail Partnership

07717 411614
hannah@gcrp.org.uk
[Gloucestershire Community Rail Partnership](https://www.gcrp.org.uk)



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