

# Harlech summer shuttle bus pilot: evaluation report



**29<sup>th</sup> October 2018**

**Martin Higgitt**  
Associates

---

Martin Higgitt Associates Ltd  
28 Wharfe View Road  
Ilkley  
LS29 8DU  
T 07856 525244  
E info@martinhiggittassociates.com

[www.martinhiggittassociates.com](http://www.martinhiggittassociates.com)

#### Report Record

Job No.	Report No.	Issue No.	Prepared	Approved	Status	Date
2009	1	1	Martin Higgitt	Martin Higgitt	Draft final report	1/10/2018

---

# Contents

## Table of Contents

1	Introduction .....	1
2	The programme .....	2
	Introduction .....	2
	The shuttle bus service .....	2
	Highway signage .....	4
	Marketing activity .....	5
	Monitoring framework .....	10
3	The results.....	11
	Shuttle bus service performance .....	11
	Castle visitor numbers .....	13
	Marketing and promotional activities .....	14
	Use of discounts in retailers.....	15
	Car park data.....	15
	On-line visitor survey .....	16
4	Assessment of performance and impact of scheme.....	21
	Marketing and promotion.....	21
	Shuttle bus service performance .....	21
	Impact on Harlech.....	21
	Visitor attitudes.....	22
5	Conclusions and reflections .....	23
	Some lessons learned .....	23
	Broader thoughts about accessibility to Harlech and improvements to transport.....	25
	Methods for closing the revenue gap and continuing to run the service .....	26
	Potential revenue sources .....	26
	<i>Bus Fares</i> .....	26
	<i>Parking revenues</i> .....	27
	<i>Sponsorship and support</i> .....	28
	Potential cost savings.....	28
	<i>Time of bus operation</i> .....	28
	<i>Type of bus operation</i> .....	29
	Appendix A: Additional information .....	31
	Materials for project .....	31

---

Costs for re-running the Hoppa service ..... 31

Additional information from the on-line survey..... 32

---

# 1 Introduction

- 1.1 A shuttle bus service was run in Harlech during the summer holidays, providing access from the Beach car park and the lower town to the upper town and castle, as a pilot project supported through LEADER funding.
- 1.2 The purpose of the pilot was twofold: first of all to provide better visitor access to the town during the peak visitor season when the upper town becomes very busy and parking is at capacity; and second, to determine whether a financially sustainable model for running the service can be established which will pay for itself from a combination of user revenues and contributions from the visitor attractions, traders and Community Council.
- 1.3 Therefore a range of data was collected during the operation of the shuttle bus service to understand its impact and benefit to the town.
- 1.4 This report logs the measures undertaken during the summer and reports on the data collected. It concludes by assessing the impact of the service and its performance, lessons learned from the trial and makes further comments on improving the amenity of Harlech for visitors and addressing access and connectivity issues in the longer term.
- 1.5 The report is structured as follows:
  - Section 2 provides a description of the activities undertaken – the shuttle bus service and the marketing activities undertaken.
  - Section 3 describes key data including numbers of passengers carried by the shuttle bus service, visitor stats for Harlech, parking data etc.
  - Section 4 assesses the impact of the service.
  - Section 5 draws conclusions on the benefit and costs of the services, lessons learned and longer term steps for improving access to Harlech and its amenity.
  - Appendix A provides checklist of actions to provide summer shuttle, together with links to materials developed for running the pilot.

---

## 2 The programme

### Introduction

2.1 The intervention consisted of:

- Running a shuttle bus service from the Beach Car Park and lower town to the upper town and castle for the duration of the summer holiday, from July 21<sup>st</sup> to September 2<sup>nd</sup> 2018;
- Highways signage on approaches to Harlech advising visitors of the shuttle service and encouraging them to park at the Beach car park and use the shuttle instead of driving to the upper town to seek scarce parking there;
- Marketing and promotional activity to promote the shuttle service, including information on Visit Harlech and Harlech Castle websites, distribution of flyers and advertising via social media across the region. Promotional discounts were also negotiated with the castle and many Harlech retailers;
- Monitoring: development of a monitoring framework and collection of data to assess the programme.

### The shuttle bus service

2.2 An initial proposed route, stopping locations and timetable was prepared and shared with stakeholders before being agreed.

2.3 The service ran from Beach Car Park to Bron y Graig Isaf car park via A496 and Ffordd Isaf. The bus stopped at Beach Car Park, the railway station (using existing A496 bus stop) and Bron y Graig Isaf car park. There was also an informal request stop at Min-Y-Don holiday park.

2.4 The service was specified to run every day during the school holidays from Saturday 22<sup>nd</sup> July to Sunday 2<sup>nd</sup> September (as previous evidence showed that the number of visitors to the town is relatively even across all days of the week). The service ran every 30 minutes from 10am to 5.30pm from the Beach Car Park and from 10.15am to 5.45pm from upper Harlech with a timetabled running time of 5 minutes. A driver's break was incorporated into the timetable with the 1.30pm service from Beach Car Park and 1.45pm return missed out. This enabled the service to be provided by one driver, reducing costs. The service was timetabled so that it would integrate with rail arrivals and departures from the south and the north at Harlech rail station.

2.5 The service was procured as a local bus service. It was advertised on Sell2Wales, with a brief explaining what was required, together with the contract that the successful bidder would sign. Tenderers were required to provide copies of their operating licence and insurance certification. Two tenders were received and Lloyds Coaches was selected to run the service. They were required to register the service with the Traffic Commissioner 56 days before the service started. (This meant that the tender exercise had to be completed by late May).

---

*The bus timetable*

**From Beach Car Park to Upper Harlech**

Harlech Beach Car Park	10:00	10:30	11:00	11:30	12:00	12:30	13:00
Railway Station	10:02	10:32	11:02	11:32	12:02	12:32	13:02
Upper Harlech	10:05	10:35	11:05	11:35	12:05	12:35	13:05

**From Upper Harlech to Beach Car Park**

Bron y Graig Car Park	10:15	10:45	11:15	11:45	12:15	12:45	13:15
Railway Station	10:18	10:48	11:18	11:48	12:18	12:48	13:18
Harlech Beach Car Park	10:20	10:50	11:20	11:50	12:20	12:50	13:20

**From Beach Car Park to Upper Harlech**

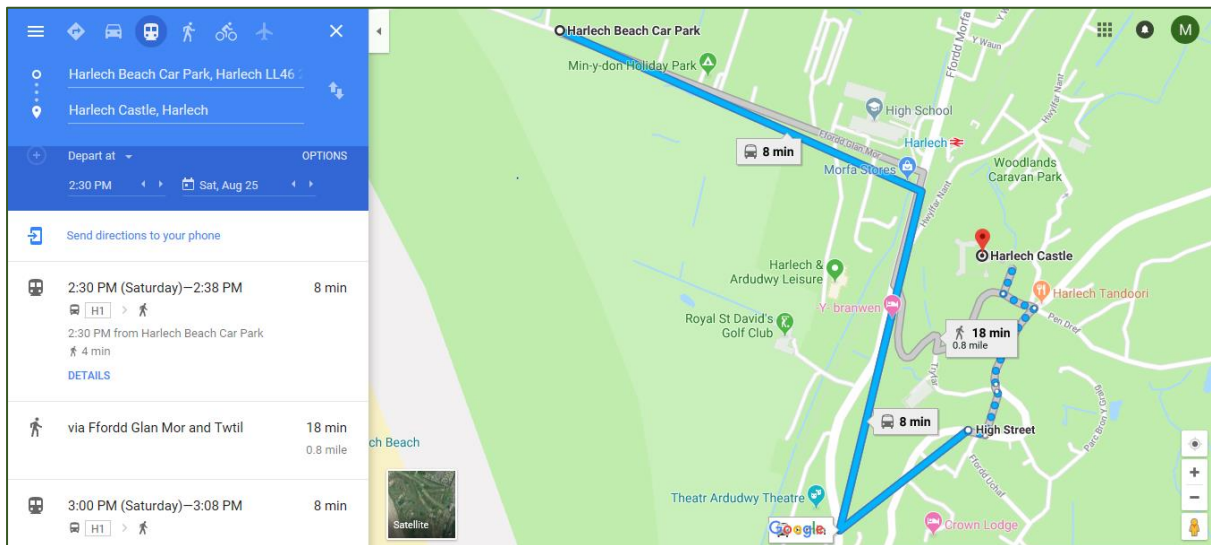
Harlech Beach Car Park	14:00	14:30	15:00	15:30	16:00	16:30	17:00	17:30
Railway Station	14:02	14:32	15:02	15:32	16:02	16:32	17:02	17:32
Upper Harlech	14:05	14:35	15:05	15:35	16:05	16:35	17:05	17:35

**From Upper Harlech to Beach Car Park**

Bron y Graig Car Park	14:15	14:45	15:15	15:45	16:15	16:45	17:15	17:45
Railway Station	14:18	14:48	15:18	15:48	16:18	16:48	17:18	17:48
Harlech Beach Car Park	14:20	14:50	15:20	15:50	16:20	16:50	17:20	17:50

- 2.6 A briefing meeting was held with the successful operator before beginning the service. Special requirements for the service were laid out, which included the need for drivers to hand a promotional leaflet to passengers and to advise them that their bus ticket would provide discounted entry to the castle. It also covered the data requirements (laid out in the contract) that would need to be provided so that we could evaluate the trial.
- 2.7 As part of the briefing meeting, a field visit was conducted to examine the route, stopping points and any manoeuvres that the bus would need to undertake. At the Beach Car Park, the best position for the bus to pull in was agreed and, with permission of Gwynedd Council, we were able to place traffic cones to protect the bus stopping point (as this is not an existing bus stop). Following the meeting, the bus operator prepared a risk assessment.
- 2.8 The bus timetable was designed for inclusion in bus stop timetable cases. Gwynedd Council arranged for these to be placed within timetable cases.
- 2.9 Because the service was registered as a local bus service, it was automatically incorporated into journey planners, such as google maps, shown below.

*The bus route, as shown on google journey planner*



**Highway signage**

- 2.10 Highway signage was procured in order to make visitors aware of the option for using the shuttle bus service. The location of the beach car park means that cars approaching from both the north and the south need to ignore signs for Harlech and the castle along the B4593 and continue along the A496.
- 2.11 An initial proposal for where to locate highway signs and what they should say was prepared.
- 2.12 A road signs firm was then appointed to review the proposed locations and the design the signs. They prepared a signage schedule for approval by Gwynedd (see Appendix A). Following approval, they arranged for preparation of the signs and positioning them at the agreed locations on the highway.
- 2.13 A total of 10 signs were placed, five to the south, with the first one at Llanfair and five to the north, with the first sign at 200 yards before the A496/B4593 junction (again see Appendix A for map showing locations of signage).

*Examples of signage commissioned...*





...and the signage in place



### Marketing activity

2.14 A major element of the programme was to ensure the service was as effectively presented and marketed as possible.

#### Branding and identity

2.15 Menter Môn developed branding for the service, utilising the Visit Harlech colour palette. This design was carried into all marketing materials.

2.16 They then utilised a design agency to design exterior branding for the bus.

#### Branding developed for exterior of bus



### Promotional offers for bus users

- 2.17 At an initial meeting with community representatives and Harlech Castle, agreement was reached for discounted offers to be provided for shuttle bus users.
- 2.18 Harlech Castle agreed to provide a discount on entry tickets equivalent to a single fare, on presentation of the bus ticket. Discounts were provided for adult, child, concession and family group tickets.
- 2.19 Community representatives collaborated with retailers in Harlech to provide a discount for Harlech Hoppa users. A deal was agreed where retailers offered £1 off for every £10 spent. Eight retailers joined the scheme. A poster was designed for them to display in their premises.

### Retailers offering discounts to Hoppa users were given posters to display



### Publicity

- 2.20 Various marketing channels and materials were used to promote the service and raise awareness, including:
- Visit Harlech website hosted a page on the Harlech Hoppa service at <https://www.visitharlech.wales/harlech-hoppa>.
  - They also promoted the service through their facebook page.
  - Harlech Castle included reference to the service on their home page.
  - Flyers were produced promoting a day out in Harlech and advertising the Hoppa bus service. These were distributed to accommodation providers, including major camping and caravan parks. (see overleaf).
  - Bus passengers received a flyer welcoming them to Harlech and providing information on discounted entry to the castle and discounts available at local retailers.

- Flags were provided at the Beach Car Park to clearly advertise where the bus departed from. A-boards providing information about the service were also placed at Beach Car Park, Min-Y-Don holiday park and Bron y Graig car park.
- Timetable information was incorporated into timetable cases at the relevant bus stops.
- Signage was provided at the rail station directing rail passengers to the bus stop on the main road, along with information on the Hoppa service.
- A video advertising the service was made and promoted via facebook and social media.
- Press releases were provided by Visit Harlech and Min-Y-Don holiday park promoting the service.

*A flyer was produced in English and Welsh promoting a visit to Harlech and use of the Harlech Hoppa service*

**EXPLORE HARLECH**  
**ON THE *hoppa* HARLECH BUS SERVICE**

**THE HARLECH VOUCHER**  
We'll also give Hoppa Harlech users a Harlech voucher which entitles you to £1 off every £10 spent at various attractions or shops in the town.  
Find out more and plan your trip to Harlech at [www.visitharlech.wales](http://www.visitharlech.wales)

**VISIT HARLECH**  
No trip to this special part of Wales can be complete without a visit to Harlech and its UNESCO world heritage castle. Come and discover some fascinating history and take in the breathtaking scenery from the castle.  
As well as the castle, there's a beautiful historic town to explore and we're full of wonderful restaurants and cafes to relax and watch the world go by.  
You can then relax on our beautiful beach, or if you're feeling more active, take a dip in our community run swimming pool or try out the climbing wall.

**THE HOPPA HARLECH BUS SERVICE**  
To make your visit more relaxed and easier, we're laying on a Hoppa Harlech bus service over the summer holidays starting on the 21st July until 2nd September 2018.  
Park at the Beach Car Park and jump on the Hoppa Harlech Bus which runs every 30 minutes from 10am to 5.30pm every day of the week. The bus takes 5 minutes to take you to Upper Harlech and the castle.  
The bus costs £1 for adults and 50p for children (5-15) and is free for under 5's and Welsh concessionary pass holders.

**DISCOUNTED ENTRY TO CASTLE**  
Visitors to the castle will get the cost of their bus ticket off the price of castle entry or can buy a special discounted family ticket for £17. (2 Adults and up to 3 children under 16).

**hoppa HARLECH**  
Every 30 minutes every day of the week from 21<sup>st</sup> July to 2<sup>nd</sup> September, 2018.

Harlech Beach Car Park	2 mins	Railway Station	5 mins	Upper Harlech
------------------------	--------	-----------------	--------	---------------

**Departing beach car park for Upper Harlech:**  
10:00 10:30 11:00 11:30 12:00 12:30 13:00  
14:00 14:30 15:00 15:30 16:00 16:30 17:00 17:30

**Returning from Upper Harlech to beach car park:**  
10:15 10:45 11:15 11:45 12:15 12:45 13:15  
14:15 14:45 15:15 15:45 16:15 16:45 17:15 17:45

Logos: Menter Môn, NDA, European Union, Visit Harlech, etc.



Flags, A-boards, posters, signage and timetable cases provided information on how to use the service



*A video promoting the service and showing people how to use it was promoted via facebook and social media channels*



*A press release*

## Warm welcome for the summer shuttle bus service in Harlech

The Hoppa Harlech summer shuttle bus service, which will run every 30 minutes to take people from the beach, holiday parks and train station up into Harlech town centre, has been welcomed as great news for the town.

The pilot service, which will run from July 21 to September 2, may be accompanied by a voucher scheme offering bus passengers discounts in local shops. Harlech Castle is offering to refund the cost of the bus journey if passengers visit the UNESCO World Heritage Site.

Councillor Judith Strevens, Harlech Community Council chairman and owner of Castle Gift Shop, said the hopper Harlech service was designed to overcome parking problems in upper Harlech by encouraging car owners to park in the long stay car park in the lower part of the town. She explained that a shuttle bus service was originally run while work was being carried out to the castle visitor centre and now Gwynedd Council is looking at ways to regenerate and improve Harlech. "The Hopi Harlech park and ride shuttle service will pick up passengers in the beach car park, stop at Min-y-Don and Castle View Holiday Parks and the train station and then drop them off in upper Harlech," she said. "We have such a problem with parking in upper Harlech that we must encourage people to park at the bottom and then ferry them up into the town. We are encouraging businesses to support a voucher scheme to offer passengers discounts in town shops. A feasibility study is being carried out to see if it's worthwhile doing."

Tony Bywater, chairman of Salop Leisure, owner of [Min-y-Don](#) and Castle View Holiday Parks, warmly welcomed the shuttle service: "It's great news for Harlech and the people who visit our holiday parks," he said. "There are around 260 families staying with us at certain times throughout the season and this service will take them up into the town to spend money in the shops and businesses that will benefit everybody in Harlech."

The project has received funding through the Welsh Government Rural Communities – Rural Development Programme 2014-2020. The programme is funded by the European Agricultural Fund for Rural Development and the Welsh Government. The project is also part funded by the Nuclear Decommissioning Authority and Gwynedd Council.



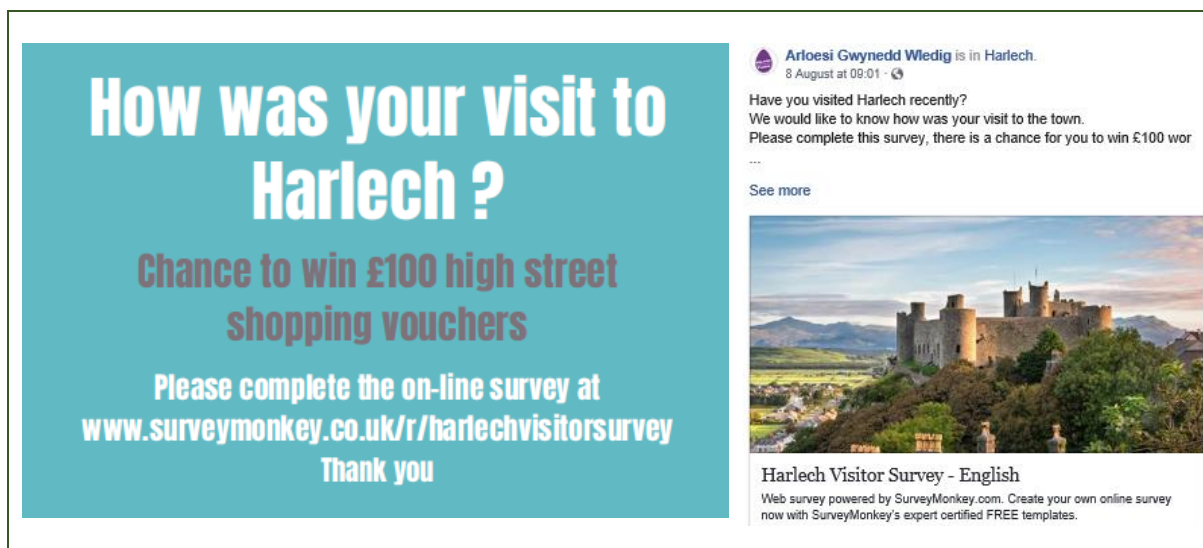
---

## Monitoring framework

2.21 A monitoring framework was designed to assess the success of the trial and the impact of the service. This included:

- Shuttle bus users: numbers using each service during the day for the duration of the service operation, with a breakdown of concessions, adults, children and revenue. (provided by operator);
- Castle visitors: numbers of visitors to the castle by day throughout the summer holidays and numbers of visitors redeeming their bus ticket for discounted entry by day. (provided by Castle);
- Number of visitors who utilise the discount voucher in local retailers, provided by the retailers;
- Number of website clicks on the Visit Harlech website for getting shuttle bus information and number of facebook views of promotional material. (provided by Visit Harlech);
- Car park users: utilisation and duration of stay in the castle car park, Bron y Graig Uchaf, Bron y Graig Isaf, Hen Ysgol and Beach car parks and for the on-street parking in upper Harlech. (Gwynedd Council and 'beat surveys');
- Online visitor survey: on-line survey for visitors to complete to provide information about their visit, whether they used their bus, experience of bus or car parking, activities they undertook in Harlech, to understand visitors experience and to discover whether bus passengers displayed different behaviour from non bus users;

***A business card was handed to visitors to encourage them to take part in the survey and it was promoted via facebook***



**How was your visit to Harlech ?**

**Chance to win £100 high street shopping vouchers**

Please complete the on-line survey at  
[www.surveymonkey.co.uk/r/harlechvisitorsurvey](http://www.surveymonkey.co.uk/r/harlechvisitorsurvey)

Thank you

Arloesi Gwynedd Wledig is in Harlech.  
8 August at 09:01 · 🌐

Have you visited Harlech recently?  
We would like to know how was your visit to the town.  
Please complete this survey, there is a chance for you to win £100 wor  
...

See more

Harlech Visitor Survey - English

Web survey powered by SurveyMonkey.com. Create your own online survey now with SurveyMonkey's expert certified FREE templates.



---

### 3 The results

- 3.1 The results of the trial are described below, comprising shuttle bus patronage, visitor numbers to the castle, marketing visibility, use of the Harlech voucher, car parking activity and the results of the on-line visitor survey.

#### Shuttle bus service performance

- 3.2 The shuttle bus carried 3,561/3,756 passengers over the 44 days of operation, which broke down into categories as follows:

Type	Number	Revenue
Adult	2,370	£2,370
Child (5-15 years)	724	£362
Infant (0-5 years)	?? / 195	£0
School	249	£0
Welsh concession	209	£0
Pass	9	£0
<b>Total</b>	<b>3,561 / 3,756</b>	<b>£2,732</b>

- 3.3 This translates to:

- An average of 80.9 (85.4) passengers per day;
- An average of 2.7 (2.8) passengers per service;
- An average of £0.77 (£0.73) revenue per passenger.

- 3.4 Bus data showed that 2,534 trips were made up the hill (with 67% starting at Beach Car Park, 11% starting at Min-y-Don and 23% starting at rail station), with a further 1,222 trips made down the hill. If we assume that two thirds of trips down the hill were return trips by people who had used the bus to travel up the hill, whilst a third of trips down the hill were one-way, this would imply a total of 2,942 unique users.

#### 3.5 Lloyds: Number of trips per day

- 3.6 Drivers were asked to fill in individual journey logs showing where passengers boarded and alighted over a period of two weeks, so we could understand in more detail the well-used and less well-used, services, the numbers of people using the bus to travel to upper Harlech and the number using it to travel back down, and the numbers making use of intermediate stops.
- 3.7 The two tables overleaf show the average daily loading of each service, first for services from Beach car park to upper Harlech and then for services from upper Harlech to the Beach car park, based on records kept from Friday 17<sup>th</sup> August to Thursday 30<sup>th</sup> August.
- 3.8 Over this two week period of detailed journey by journey and boarding logs, on average, the service was used by 85 people per day, with 58 using it to reach upper Harlech and 27 using it to return to the beach car park. This equates to just under 4 people on average for upward journeys and just under 2 people for return journeys.

- 3.9 For travel up the hill, the bus averaged more than 3 people per journey for services from 11am until 3pm. For travel down the hill, the peak times were 14:15 until 16:45. Two thirds of passengers boarded at the Beach Car Park, with a further 10% boarding from Min-y-Don and 21% boarding at the rail station. For the downhill journey, 95% of trips were to the Beach Car Park, with just 5% to the rail station and none to Min-y-Don, presumably to the easier walk on the return.
- 3.10 Looking at both upwards and downwards services together, 93% of all passengers were carried between 11am and 4.45pm. The four return service runs at 10am, 10.30am, 5pm and 5.30pm carried just 3% of passengers.
- 3.11 These daily records also confirm that Mondays to Thursdays were the busiest days, with the service relatively lightly used on Fridays to Sundays.

***Average passenger loadings by service for journeys from Beach Car Park to Upper Harlech***

Departure time	Passengers boarding at:			
	Beach car park	Min y Don	Rail Station	Total
10:00	0.36	0.50	0.36	1.21
10:30	0.57	0.14	1.50	2.21
11:00	2.29	1.57	1.00	4.86
11:30	4.71	0.86	0.71	6.29
12:00	3.64	0.29	1.57	5.50
12:30	5.29	0.43	1.79	7.50
13:00	4.43	1.21	1.50	7.14
14:00	5.86	0.14	0.79	6.79
14:30	5.14	0.50	1.14	6.79
15:00	2.93	0.00	0.29	3.21
15:30	0.71	0.00	0.36	1.07
16:00	0.69	0.00	0.00	0.69
16:30	1.31	0.00	0.77	2.08
17:00	0.77	0.00	0.69	1.46
17:30	0.23	0.23	0.00	0.46
Total	38.93	5.87	12.46	57.26

***Average passenger loadings by service for journeys from Upper Harlech to Beach Car Park***

Departure time	Passengers disembarking at:			
	Beach car park	Min y Don	Rail station	Total
10:15	0.14	0.00	0.00	0.14
10:45	0.07	0.00	0.07	0.14
11:15	0.71	0.00	0.14	0.86



11:45	0.64	0.00	0.00	0.64
12:15	0.36	0.00	0.00	0.36
12:45	1.50	0.00	0.00	1.50
13:15	2.07	0.00	0.29	2.36
14:15	5.00	0.00	0.14	5.14
14:45	2.00	0.00	0.00	2.00
15:15	3.43	0.00	0.00	3.43
15:45	3.38	0.00	0.31	3.69
16:15	3.38	0.00	0.23	3.62
16:45	3.46	0.00	0.15	3.62
17:15	0.62	0.00	0.00	0.62
17:45	0.00	0.00	0.00	0.00
Total	26.77	0.00	1.34	28.11

3.12 A final piece of data that was examined was passenger numbers on the existing no.39 service from Porthmadog to Barmouth / Dolgellau, which provides a few daily services between lower and upper Harlech. It was hoped that the provision of the Hoppa service would not abstract passengers from this local service. Data showed that people boarding at Harlech comprised 12.5% of passengers on this route. The average daily patronage by Harlech boarders declined by 11.7% during the summer holidays, but declined by 8.7% across the whole route during this time. The decline in Harlech passengers was 3.2% greater than the decline on the rest of the route, with an estimated 25 passengers lost. In revenue terms, this represented a 0.4% loss of revenue across the route. Therefore, it is concluded that the Harlech Hoppa had a negligible impact on the existing local service.

### Castle visitor numbers

3.13 The castle received 17,769 visitors during July, a 2.8% increase on the previous July. It received 28,789 visitors during August, a 10.6% decline on the previous August.

3.14 During the summer holiday, a total of xxx people visited the castle.

- Number of adult tickets / child tickets / concessions / family tickets sold.
- Profile of daily visitors and arrival times by hour

3.15 The castle maintained a record of the number of discounted entries bought by Hoppa Bus users.

3.16 In total, 590 discounted tickets were purchased between Thursday 26<sup>th</sup> July and Sunday 2<sup>nd</sup> September as follows:

- Adult ticket: 337
- Senior / student / military: 108

- Child: 74
- Family of 4: 50
- Family of 5: 21

3.17 This equated to 824 individuals entering the castle on a discounted Hoppa bus ticket, at a total cost of around £700 to the castle (in terms of revenue foregone on normal ticket price). This represented an average of 18.7 people per day using a Hoppa discount, equating to 22% of all Hoppa passengers carried. Using the assumptions made above on unique users, this would imply 28% of people boarding the shuttle bus went on to visit the castle.

3.18 Daily records show the average number of people buying discounted tickets by day of week. Monday to Thursday are the busiest days, and Friday to Sunday are the quietest. Around twice as many people visited the castle with a discount ticket on Mondays – Thursdays compared to Fridays – Sundays.

***Average number of Harlech Hoppa discount entries to castle by day of week***

<b>Day</b>	<b>Average</b>
Monday	27.8
Tuesday	30.4
Wednesday	28.2
Thursday	24.5
Friday	12.2
Saturday	17.0
Sunday	11.3
	151.4

3.19 The castle also maintained a log of weather conditions (sunny, overcast or raining). It showed that sunny days (36% of all days) had 10% more than average visitors and rainy days (21% of all days) had 22% less visitors using the Hoppa bus discount.

3.20 Interestingly, data from the visitor survey suggested that only 47% of Hoppa bus users who visited the castle said that they used their discounted entry entitlement.

3.21 A total of 73 Arriva Trains 2 for 1 discount entry tickets were sold during the same period, equating to 146 castle entries. The Hoppa Bus discount was used by five times as many people.

**Marketing and promotional activities**

3.22 Marketing activities had the following outreach:

- Visit Harlech: the Hoppa web page on the Visit Harlech website received 900 hits;
- Facebook postings reached a good audience. The promotional video of the Harlech Hoppa has been viewed on 19,867 occasions as at 25<sup>th</sup> October 2018;
- 2,000 A4 flyers for distribution to holiday accommodation were produced, together with 2,000 A5 voucher flyers for people boarding the bus.

## Use of discounts in retailers

3.23 A total of 30 visitors used their discount vouchers at two of the retailers participating in the scheme. **(Community: to confirm how many vouchers were used).** In the visitor survey, 61% of Harlech Hoppa users remembered receiving the flyer with the discount voucher and 38% of these said they had used their Harlech Hoppa discount in local shops.

## Car park data

3.24 Gwynedd Council car park ticket sales showed:

- **Total number of tickets sold in castle car park, Bron y Graig Uchaf, Bron y Graig Isaf, Hen Ysgol and Beach car parks.**

3.25 Periodic utilisation surveys of the car parks were undertaken on four occasions throughout the holiday period. Casual observation showed that the car parks in upper Harlech started filling up between 10.30am and 11am and then the main car parks remained full til around 3pm when utilisation started to reduce. Across the four car parks in upper Harlech, utilisation was over 100% (i.e. some parking outside of parking bays) throughout the core period of the day (11am til 3pm). The beach car park was never observed to have utilisation above 40%. Spot surveys were undertaken on other days which showed similar levels of utilisation at this time.

### *On-street parking utilisation from beat survey on Tuesday 14th August*

Approx Time	Hen Ysgol		Bron y Graig long-stay		Bron y Graig short-stay		Castle		Beach	
10:30	11	50%	26	57%	17	32%	-		-	
12:30	20	91%	50	109%	53	100%	27	100%	-	
14:30	25	114%	46	100%	52	98%	27	100%	90	38%
16:30	11	50%	27	59%	27	51%	20	74%	43	18%
Total spaces	22		46		53		27		234	

3.26 Beat surveys were undertaken of on-street parking at roughly two-hourly intervals on Tuesday 14<sup>th</sup> August. Spot surveys were also undertaken on three other days which confirmed similar levels of utilisation. Of the 32 marked out on-street bays, on average during the busy time of day just under 90% were occupied. However, there was a lot of illegal parking outside of bays. This meant that overall on-street occupation was typical 9%-16% over capacity for much of the day. The beat surveys on 14th August logged number plates in order to gauge the amount of over-staying. It showed that up to 12 cars (representing 38% of official bays) were staying for longer than the official time limit. Many of these stayed for several hours, suggesting that they belonged to residents or local businesses.

### *On-street parking utilisation from beat survey on Tuesday 14<sup>th</sup> August*

Time	10:45	12:45	15:00	16:30
Total spaces	32	32	32	32

Occupied	29	28	27	25
Empty	3	4	5	7
Illegally parked	8	9	8	5
<b>Total</b>	<b>37</b>	<b>37</b>	<b>35</b>	<b>30</b>
Overstayers		12	10	8
Utilisation	116%	116%	109%	94%
% overstayers as % of total cars	n/k	32%	29%	27%
% overstayers as % of total spaces	n/k	38%	31%	25%

### On-line visitor survey

3.27 120 people completed the on-line visitor survey.

3.28 The purpose of their visit to Harlech was as shown below, although it should be noted that the survey had no mechanism for controlling the sample. Its title, "Harlech Visitor Survey" hopefully meant that mainly tourist visitors or people visiting friends and family filled it in, so it will under-represent shoppers and people from the locality who come to Harlech frequently.

<b>Purpose of visit</b>	Number	%
Tourist visit	83	69%
Shopping	11	9%
Visiting friends & family	17	14%
Other	9	8%
Total	120	

3.29 Tourist visitors were asked how many times they had visited Harlech before. Nearly a third were first time visitors, but the majority had visited more than twice. Of these, 45% had last visited Harlech this year, 39% the previous year, with the remaining 16% having visited longer ago. This shows that Harlech has a strong repeat visitor market with tourists visiting frequently.

<b>How often have you visited Harlech?</b>	Number	%
This is the first time	22	31%
Once	7	10%
Twice	3	4%
More than twice	40	56%
Total	72	

3.30 14% of tourist visitors were on a day visit, with the remainder on longer stays. The average duration of stay was 6.8 nights.

<b>Length of visit</b>	Number	%
------------------------	--------	---

Day visit	10	14%
2-3 nights	12	17%
4-5 nights	13	19%
6-8 nights	23	33%
9-13 nights	6	9%
>14 nights	6	9%
Total	70	

3.31 Tourist visitors were asked about the size and composition of their groups. 45% of groups were adults only and 55% were mixed adult and children groups. The average number of people per group was 3.7, with 2.6 adults and 1.1 children. The commonest group type was two adults with no children (26%).

Adults	Children	0	1	2	3	4	5	6	Total
1		2	2	3					7
2		18	5	11	5	1			40
3		5	2	2					9
4		3	0	1	2				6
5		1	1						2
6		2		2				1	5
	<b>Total</b>	31	10	19	7	1	0	1	69

3.32 Tourists were asked how they travelled to Harlech. 3% were already staying in Harlech, a small number arrived by foot or by train, with the vast majority arriving by car (83%).

Tourist arrivals	Number	%
by car	57	83%
by train	5	7%
by foot	5	7%
already in Harlech	2	3%
Total	69	

3.33 All survey respondents were asked whether they used the Hoppa Bus service. 29% had used it.

Who used the Hoppa bus?	Yes	No	Total	%
Tourists	20	60	80	25%
Shoppers	3	7	10	30%
Visiting friends & family	8	9	17	47%
Other	3	6	9	33%
Total	34	82	116	29%

- 3.34 For those who had used it, 52% were aware of it before travelling to Harlech, whilst 48% saw the signs on the road. This presents good prior awareness of the service, but demonstrates the importance of good road signage.

<b>Were you aware of the Hoppa service before you set out for Harlech?</b>	Number	%
Yes	17	52%
No, saw signage on road	16	48%
Total	33	

- 3.35 Those who were aware of the Hoppa service in advance were asked where they had heard about it. 65% had heard about it on-line and 47% had heard about it via word of mouth. Several people had heard about it from multiple sources. This demonstrates the importance of modern on-line channels and old-fashioned word of mouth.

<b>Where did you learn about it?</b>	Number	%
on-line	11	65%
word of mouth	8	47%
poster / leaflet	3	18%
email	1	6%
Total	23	135%

- 3.36 Users of the service were asked to rate their experience of it against four criteria: easy to understand, reliability, friendliness of drivers and value for money. The service was rated very highly across all areas, with 88% of responses across all criteria rating it as very good or good. The average score (out of 5) was between 4.41 for easy to understand to 4.66 for friendliness of driver.

<b>Rating of Hoppa service</b>	Very good	Good	Reason-able	Poor	Very poor	Total	<b>Average</b>
Easy to understand	21	6	3	1	1	32	<b>4.41</b>
Reliability	20	8	3	0	1	32	<b>4.44</b>
Friendliness of driver	25	5	1	0	1	32	<b>4.66</b>
Value for money	20	8	3	0	1	32	<b>4.44</b>

- 3.37 Hoppa bus users and non-Hoppa users were asked if they visited the castle. 61% of Hoppa users did compared to 54% of non-Hoppa users. Hoppa bus users who visited the castle were asked whether they made use of their discount voucher for castle entry. Nine of the 19 Hoppa bus users who visited the castle said they used the voucher (47%). 67% of castle visitors thought they would have visited the castle anyway, without the Hoppa service, 22% were unsure and 11% wouldn't have visited.

<b>Did you visit the castle?</b>	Hoppa bus users	People who didn't use Hoppa
Yes	19	43
No	12	36
Total	31	79

%	61%	54%
---	-----	-----

3.38 Both Hoppa users and non-Hoppa users were asked what other activities they undertook during their visit to Harlech. 78% of Hoppa users visited shops and had refreshment, compared to 74% of non-users and 78% had refreshments compared to 71%. On average, Hoppa users undertook 2.5 activities in Harlech compared to 2.0 activities for non-users (24% greater). They undertook an average 1.56 'economic activities' (visiting shops / having refreshment), compared to 1.45 for non-Hoppas users (8% greater).

<b>What other activities did you do?</b>	Hoppa users	%	Hoppa non-users	%
visit shops	25	78%	59	74%
have refreshment	25	78%	57	71%
explore town	22	69%	37	46%
other	7	22%	6	8%
Average number of activities	2.47		1.99	
Average visit shops / refreshment	1.56		1.45	

3.39 Hoppa users were asked whether they received their Harlech flyer on boarding the bus (which contained the Harlech Hoppa discount voucher for use in local shops). 68% said they did receive it, 13% said they didn't, with the remaining 19% unsure. Of those who remembered receiving it, 38% said they used it. This would imply that about 26% of groups boarding the bus used the Harlech Hoppa discount voucher in shops.

3.40 Users and non-users were also asked how long they stayed in upper Harlech. Hoppa users averaged 3 hours, 17% longer than non-users who averaged 2.56 hours.

<b>How long did you stay in Harlech?</b>	Hoppa users	%	Hoppa non-users	%
Less than an hour	0	0%	8	10%
1-2 hours	9	29%	25	32%
2-3 hours	9	29%	22	29%
3-4 hours	7	23%	12	16%
4-5 hours	2	6%	2	3%
5-6 hours	2	6%	1	1%
Longer than 6 hours	2	6%	7	9%
Total	31		77	

3.41 Harlech Hoppa users were asked whether they felt they would have stayed as long in upper Harlech if they hadn't used the bus. 40% thought they wouldn't have stayed as long.

<b>Would you have stayed as long if you hadn't used the Hoppa service?</b>	Number	%
Yes	10	33%
No	12	40%
Unsure	8	27%

Total	30	
-------	----	--

3.42 A total of 55 (46%) survey respondents said they drove to upper Harlech and parked there. 63% parked in a car park, 27% on-street and 10% elsewhere (mainly private off-street residential parking).

Where did you park?	Number	%
In car park	33	63%
on-street	14	27%
Other	5	10%
Total	52	

3.43 Car parkers were asked to rate their experience of car parking for ease of understanding and value for money. Despite the parking pressure in upper Harlech, most people were reasonably happy with parking, though their satisfaction rating was significantly lower than Hoppa bus users.

Rating of service	Very good	Good	Reason-able	Poor	Very poor	Total	Average
Easy to understand:	12	8	22	4	4	50	<b>3.40</b>
Value for money	12	8	23	2	0	45	<b>3.67</b>

3.44 Hoppa non-users were asked whether they were aware of the bus before they came to Harlech. A significant minority of people who parked in upper Harlech were aware of the service beforehand. A majority of people who didn't use the Hoppa and didn't park in upper Harlech were aware of the service. Overall, 42% said they were aware of it beforehand, which is quite a good level of awareness.

Were you aware of the Hoppa service?	People parking in upper Harlech		Didn't use Hoppa / didn't park in upper Harlech		Total	%
Yes	17	35%	13	54%	30	42%
No	31	65%	11	46%	42	58%
Total	48		24		72	

3.45 People were asked what they particularly liked about Harlech and what they felt could be improved. The full set of responses are shown in Appendix A.

3.46 Key themes for what people liked were the castle, the views, the shops and cafes, the friendliness of the town and the beach.

3.47 Key themes for what people felt could be improved were easier parking, less traffic congestion, better pavements and less trafficked areas to walk, more shops, more restaurants open in the evening and reinstatement of a pub

3.48 Finally they were asked whether they would recommend Harlech as a place to visit. 100 people answered this question with 98 saying yes and 2 saying no.



---

## 4 Assessment of performance and impact of scheme

4.1 Below we assess the performance and impact of the scheme.

### Marketing and promotion

4.2 There was extensive promotional activity undertaken, including on-line promotion, a web page on Visit Harlech, facebook and twitter postings, as well as printed advertising through promotional flyers, information at bus stops, in the rail station and in upper Harlech, as well as highway signage on the approaches to Harlech.

4.3 The brand for the Hoppa reflected Visit Harlech brand and was well received. The external branding of the bus was considered to be very eye-catching and professional.

4.4 All this material is ready to be re-used if the shuttle bus continues next summer.

4.5 The highway signage was well delivered by the contractor. 48% of Hoppa users said they became aware of the service through seeing the signs on their approach to Harlech.

### Shuttle bus service performance

4.6 Operationally, the shuttle bus ran very well. All timetabled services over the summer period were operated and departed on time. The external advertising gave the bus a good appearance. Passengers were very complementary about the quality of the service, rating it very highly on ease of use, reliability, friendliness of drivers and value for money. Menter Môn were able to interview a family using the bus to capture their positive feedback. <https://youtu.be/z4K4mY0uGTk>.

4.7 However, patronage on the bus was far lower than expected at **3,561 / 3,756** passengers in 2018. When a free shuttle bus was run during the summer of 2014, when the castle car park was closed, a total of 8,020 passengers were carried, an average of 196 per day, compared to 85 per day this summer (**44%** of summer 2014 levels). Whilst passengers thought the fare represented good value for money, it is unclear whether ridership was lower because of the cost or because there was a stronger encouragement to use the bus in 2014 (the highway signage suggested "Castle car park closed: please use free Park & Ride").

4.8 The revenue raised represented 22% of service costs, significantly lower than had been hoped.

### Impact on Harlech

4.9 The Castle reported that visitor numbers during the summer of 2018 were 10.8% lower than in summer 2017. It is felt that last year's CADW dragons events drew in a lot of visitors and CADW report that numbers of visitors declined across their sites throughout Wales this summer.

4.10 Conversely, the traders of Harlech considered this summer was very busy and successful and anecdotally felt that the town was a little less congested during the summer compared to normal.

- 
- 4.11 The visitor survey sought to find out whether Harlech Hoppa users were more likely to visit the castle, more likely to undertake other activities in the town and to stay longer. It must be noted that the numbers of responses to the survey, particularly from Hoppa bus users, were less than had been hoped, so these figures are presented on a very small sample size.
- 4.12 Harlech Hoppa users were 13% more likely to visit the castle than those who didn't use it. 11% of Hoppa users suggested they wouldn't have visited the castle if they hadn't used the bus, whilst a further 22% were unsure.
- 4.13 Harlech Hoppa users said they undertook an average of 2.5 activities whilst in the town (out of visiting shops, having refreshment, exploring and other), whilst non-users did an average of 2.0 activities (25% greater for Hoppa users). Users were slightly more likely to visit shops or have refreshments in the town (1.56 activities compared to 1.45 activities, an 8% difference).
- 4.14 Harlech Hoppa users stayed 25 minutes longer (3 hour 1 minute duration of stay) in upper Harlech compared to non Hoppa users (2 hour 36 minute duration of stay), 16% longer.

### **Visitor attitudes**

- 4.15 Visitors love Harlech. The town has a strong level of repeat visitors, with many having been several times before. Almost all would recommend Harlech as a place to visit.
- 4.16 What they particularly like about the town is the castle, the views, the shops and cafes and the friendliness of the locals, as well as the beach.
- 4.17 Visitors' responses to what could be improved were coded into different themes. 90 different comments were logged. 21 of these were that "nothing could be improved". 41 of the comments related to transport issues. "Improving parking" was the most common (11 comments), followed by improving pedestrian facilities – mainly suggestions to improve pedestrian provision on the High Street, including some people suggesting it should be car-free (9 comments), traffic / congestion / difficult access (8 comments), encouragement to continue / extend Hoppa service (8 comments) and improve signage (for pedestrians, cars and Hoppa users) (5 comments).
- 4.18 16 comments related to improving the town's offer, in particular the number and range of shops and the reinstatement of a pub, and quite a few comments about a lack of facilities being open in the evening.
- 4.19 12 "other" comments were received, which included suggestions for improvements to castle experience, better emptying of bins and better access to the beach.

---

## 5 Conclusions and reflections

- 5.1 The running of the summer Hoppa shuttle service was popularly received and appreciated by visitors and residents / retailers. The service was well run and rated very highly by users. There was some evidence (based on small survey response numbers) that Hoppa bus users were more likely to visit the castle, more likely to use local facilities such as shops and cafes, and stayed a little longer in upper Harlech.
- 5.2 However, the numbers of people using the service was significantly below what had been anticipated and consequently recovered a much smaller proportion of its revenue.
- 5.3 This section now reflects on lessons learned, or what we would do differently if we were to run it again, before concluding with some broader observations about access to Harlech.

### Some lessons learned

- 5.4 With regard to bus service operation, we felt that the route, stopping points and the 30 minute frequency were appropriate for the service. Possible improvements could be:
- The bus service was timetabled as taking 5 minutes from the Beach Car Park to upper Harlech, but experience showed the running time was typically 7-8 minutes.
  - Stronger pedestrian signage could have been provided from Bron-y-Graig car park drop off point to the castle (which would have benefited Bron-y-Graig car park users too). We had been worried that some bus users might be annoyed that the bus did not go all the way to the castle, instead dropping them at the car park. This decision was appropriate on traffic management grounds due to the congestion on the High Street and the lack of turning space at the castle. However, no feedback was received
  - Better advertising of the bus service at the castle, with a map of the town. This should be focused on pedestrians to promote the service generally and perhaps suggest a trip to the beach, rather than car drivers arriving and finding the castle car park full, as it would be unlikely that drivers, having arrived in upper Harlech would then divert to the Beach car park to make a bus trip back into town.
  - The first two services (10am, 10:30 departures from Beach car park and 10:15 and 10:45 returns from upper Harlech) and the last two services (17:00, 17:30 departures from Beach car park and 17:15 and 17:45 returns from upper Harlech) were very lightly used. These represented 26% of services run, carrying 3% of the passengers. Possibly running the service from 11:00 to 16:45 could have reduced operational costs, though would still imply the need for a driver's rest at some point during the day.
  - The need to incorporate a driver's rest in the middle of the day took a service out from the schedule during its busiest time.
- 5.5 In terms of marketing of the shuttle bus service, we think the following would help:
- A longer lead time to promote the service and plan around it, particularly tying it in with castle promotion. We understand that the castle usually produces an annual flyer that gets distributed around tourist information centres, tourist attractions and

---

accommodation providers early in the season (March?). It would have been good to be able to promote the Harlech Hoppa service on this leaflet.

- The on-line information could have been more prominently displayed. Whilst Visit Harlech kindly hosted the Hoppa bus information, it would have been helpful to have the information more visible from the home page. The castle was unable to display information on its website until late in the holiday season.
- More generally, we wonder whether Harlech would benefit from running some sort of “Make a Day of it” campaign. Lots of visitors come primarily for the castle and have short visits, typically between 1-3 hours. Some advertising, particularly targeting overnight visitors in the broader area, could emphasise the range of activities to do in Harlech – the castle, the upper town, the beach and leisure centre – emphasising the ability to spend a day here. This could be strongly linked to train access and to the Hoppa service.
- In relation to this, we gather that the community is working on various interpretation trials for visitors to explore upper Harlech, including a nature trial, literary trial and artists trial. We believe this would superbly complement the efforts to encourage visitors to spend longer in the town and could form part of the above marketing offer.

5.6 A large number of Harlech Hoppa users found out about the service en route to Harlech, demonstrating the importance of highway signage, although many non-users said they were not aware of it. The highway signage could be improved as follows:

- Earlier advance signs from the north, particularly from the Pont Briwet link road from Porthmadog.
- Some people said they failed to see signs from south until they were at the junction with Ffordd Isaf, although the signs were correctly placed in prominent locations at Llanfair, a mile to the south and then 300 yards south of the junction and at the junction.
- The original bilingual signs used the Welsh word “am” for “for”. Anecdotal reports suggested English-speaking tourists were interpreting this as meaning the Park & Ride was only available during the morning. This was changed.
- When people turned onto Beach Road, there was no further signing along Beach Road. A sign following the turning to advise people to continue to the car park at the end of Beach Road would help.

5.7 In terms of the visitor survey, the response numbers were lower than planned, particularly for Harlech Hoppa users. We had originally hoped to get at least 100 responses from users and 100 from non-users. We ended with 40 responses from users and 80 from non-users. A visitor survey business card was printed and handed to businesses in Harlech and some of these businesses did actively encourage visitors to fill in the survey. It was noticeable that after visiting these businesses to encourage them to hand out the card, the survey response significantly increased temporarily. Details of the visitor survey were included in the flyer handed to bus passengers, but it was apparent this was missed. In hindsight, we should have handed out the visitor survey business cards to Hoppa users as they boarded the service.

---

## **Broader thoughts about accessibility to Harlech and improvements to transport**

- 5.8 We believe that the Hoppa service could be much better used if car parking strategy sought to encourage as many people as possible to park at the Beach Car Park.
- 5.9 Car parking management would need to play a critical role in this.
- 5.10 Currently, there seems to be little or no enforcement of on-street parking and limited enforcement in car parks. At peak times, we regularly observed in the region of 8-10 cars illegally parked on-street, sometimes causing traffic problems. At peak times, up to a third of cars parked on-street had overstayed the time restrictions advertised. It seemed likely that most of these cars belonged to local residents or workers. We would observe that from a visitor management point of view, we want to encourage visitors to spend longer and undertake more activities in upper Harlech, so having one hour on-street restrictions on car parking is encouraging them to avoid parking in a car park and to shorten their trip. We would therefore suggest that it may be appropriate to reclassify some on-street parking as resident only (e.g. the parking to the north of the castle junction) and the parking adjacent to the church, and to restrict all other on-street parking to 30 minutes (aimed at local people using the shops). Trips beyond this duration should be encouraged to use the car parks.
- 5.11 From a traffic management point of view, we want visitors arriving in upper Harlech by car to route directly to an appropriate car park. Prior awareness of appropriate car parking and clear signage would assist. Currently from the south, there is a parking sign to Hen Ysgol car park, which is small and up a challenging access route. We would suggest this is better used as a car park for local people, perhaps for residents permits (especially if there were occasional removal of on-street parking in the High Street, as suggested below) and so should not be signed from the main road. Visitor traffic should be clearly and directly signed to Bron-y-Graig car parks, with clearer signing to show the short-stay car park and the long-stay car park beyond.
- 5.12 There is a lack of disabled car parking in upper Harlech. Guidance suggests that a minimum of 4% of car parking spaces should be for blue-badge holders, though higher proportions are considered appropriate. Only 5 of 141 spaces in the upper Harlech car parks are for disabled users. The ageing of the population, the older than average profile of rural areas and the fact that older people are one of the key tourist markets to Harlech makes us consider that a higher proportion of disabled parking should be provided. In particular, we suggest that the castle car park should include a greater number of disabled bays.
- 5.13 Given the massive pressure on car parking in upper Harlech during the summer season and the attendant traffic congestion issues it brings, it would be sensible to use pricing and information to direct car-borne visitors to appropriate parking. Conversely, the Beach car park is significantly under-used.
- 5.14 If the Hoppa service were to continue, it would be desirable to alter the pricing regimes of the car parks. We would suggest that the castle car park should become a 'premium' car park (e.g. £5 for 2 hours). At the same time, we would suggest dropping the Beach Car Park tariffs, as well as providing a range of short-stay through to long-stay tariffs here. Lots of people use this car park for dog-walking or short trips to the beach and the lack of short-stay tariffs might either put people off using it, or simply mean they don't pay. The long-stay rate should be significantly lower than in upper Harlech to further

---

encourage use of the Hoppa service. Ideally, a long-stay tariff could incorporate use of the Hoppa service.

- 5.15 We believe that small increases to tariffs in upper Harlech, reduced tariffs at the Beach Car Park and better enforcement could be revenue neutral, due to the underuse of the Beach car park, overuse of on-street and perceived large amount of payment avoidance.
- 5.16 Coach parking should be provided at Bron-y-Graig Uchaf to support coach trips coming to upper Harlech.
- 5.17 The car parking tariffs should be prominently communicated via on-line information. We need as many visitors as possible to know that it is much cheaper to park at the Beach car park before they arrive in Harlech and to be discouraged from heading to the castle car park. Variable message signing on the approaches to Harlech (“Upper Harlech car parks full, please use Park & Ride from beach”) would assist, though is expensive and requires an active management regime
- 5.18 There is a clear need to improve pedestrian facilities in the High Street, both from an amenity and a safety point of view during the busy summer season, though the nature of the through road, narrow carriageway and lack of continuous footway makes this very challenging.
- 5.19 One pragmatic step would be to have a surface treatment in the village centre which denoted the change in the nature of the road to an area with a large number of pedestrians, supported by a 20mph limit through the village (from Bron-y-Graig through to beyond the castle junction).
- 5.20 More ambitiously, the possibility of temporary suspensions to on-street parking on the High Street could be examined. This could be just for the peak visitor times of day (11am to 4pm for example during the summer holidays), meaning that local people could still use the convenience of the on-street parking at other times. Alternatively, such a scheme could be trialled in association with a castle event day. This could include on-street activities such as cafés spilling out onto the street.

### **Methods for closing the revenue gap and continuing to run the service**

- 5.21 This final section considers the financial potential for running the service again. This requires the revenue gap to be closed which could come from two sources: increasing revenue sources for the service or reducing service costs.

#### **Potential revenue sources**

##### ***Bus Fares***

- 5.22 In 2018, bus fare revenues were £2,732, representing 22% of service costs.
- 5.23 The potential revenue sources for the bus include:
- Greater income from passengers, either by increasing ridership or increasing fares;
  - Parking revenue from Community Council 10% share of net revenue or from Gwynedd Council providing greater share of revenue, or from increasing gross parking revenue by modifying parking tariffs;



- Sponsorship / financial support from community including castle and retailers;

5.24 Based on the data provided, an assessment has been made of the potential for increasing revenue for the bus service through increasing fare tariffs.

5.25 We first of all assume 10% organic growth in passenger numbers due to increased awareness of the availability of the Hoppa service and the high number of repeat visitors to Harlech. This would increase revenue by 25%.

5.26 Option 1 is to double fares, charging £2 for adults and £1 for children. We have assumed that doubling fares would lead to a 40% reduction in fare-paying passenger levels, based on standard industry price elasticities. We assume that non fare-paying passengers numbers would not be affected, except for U5's who would be travelling as part of a fare-paying family group. The impact of this is a major reduction in patronage (-29%) but a reasonable growth in revenue (+32%).

5.27 Option 2 is to charge £2 adult / £1 children for a day ticket or return ticket. Currently we estimate that around two thirds of people who catch the bus up the hill just use it one way. We estimate that about a third of people catching the bus down the hill just use it one-way. Charging double the fare for a day or return ticket would not impact people already using the bus both ways or people who do not pay a fare (apart from U5's travelling as part of a fare-paying group). We have assumed that fare-paying passengers using the bus one way would reduce by 40% in line with standard industry price elasticities, but then half of these would then use the bus both ways. The impact of this is no change in patronage from the +10% organic growth but a 47% increase in revenue.

#### ***Impact of changing bus fare tariffs on patronage and revenue***

<b>Impacts of changes in fares</b>	<b>Patronage</b>	<b>Revenue</b>	<b>% costs covered</b>
Organic growth	+10%	+12%	26%
Double bus fares	-29%	+32%	27%
Double bus fare for day ticket	+10%	+47%	31%

#### ***Parking revenues***

5.28 Another potential source of income to support the service is revenue from car parks. The Community Council currently receives 10% of net parking revenues from Harlech car parks. Whilst Gwynedd Council has not been able to provide car park data, from headline revenue data for each car park it is thought that revenue raised from the car parks is significantly below its potential. It also appears that enforcement is very limited.

5.29 It was suggested earlier that for traffic management purposes, it would benefit Harlech if more cars used the underused Beach Car Park and fewer used the busy upper Harlech car parks during the peak summer season. Parking tariffs could help to encourage this behaviour alongside the provision of the Hoppa service. Based on very limited parking data available, we have sought to model the impact of changing parking tariffs as follows:

- Castle Car Park: increase number of disabled parking spaces to 6 and make the rest of the car park a "premium" car park with a charge of £5 with a maximum stay of 2 hours.

- Increase cost of Bron y Graig short stay car park to £1.50 for up to 1 hour, £2.50 for 2 hours and £3.50 for 3 hours (from £1.10 / £2.20 / £3.30 respectively at moment).
- Increase cost of Bron y Graig long stay car park to £4 (currently £3.30) for 0-4 hours and £6 for up to 8 hours (currently £4.50).
- Drop price of Beach Car Park and introduce short-stay tariffs: 50p for up to 1 hour, £1 for 2 hours, £1.50 for 3 hours, £2 for 4 hours, £3 for 5-7 hours, £4 for 8-12 hours.
- Change on-street parking restrictions to make a third of bays resident only and to make the remainder 30 minute maximum wait.
- Make Hen Ysgol a residents car park for Harlech / Gwynedd residents.

5.30 It is estimated that the impact of these changes would be:

- To reduce parking volumes in upper Harlech by about 6%;
- To increase parking volumes at the Beach car park by about 43%;
- To increase net parking revenue by around 12%.

#### ***Sponsorship and support***

5.31 A further revenue source would be contribution from community.

- Retailers: if the eight retailers that contributed via the Harlech Voucher all paid £50 towards the running of the service, this would equate to £400. If a sponsor was found, such as a large holiday park, this could supplement further income.
- The castle could contribute an amount of revenue to the service as well as or instead of offering a discount to castle visitors. 824 castle visitors utilised the bus discount to access the castle which equated to about £700 revenue foregone, although 53% of Hoppa users who visited the castle said they didn't use the discount. The survey also suggested that Hoppa users were more likely than non-users to visit the castle and to spend longer in the town and 13% of Hoppa users said that they wouldn't have visited the castle if they hadn't used the service. So could it be worth the Castle to provide some subsidy towards the service as it brings extra visitors who otherwise might not have come?

#### **Potential cost savings**

##### ***Time of bus operation***

5.32 The service also showed disparity during the week, with Mondays – Thursdays being busier than Fridays – Sundays. However, it is felt that for the bus to become a reliable trusted method of accessing Harlech, it needs to be provided on all days, especially as many of the events days occur at weekends.

5.33 It was observed that the first two and last two services of the day were very lightly used. If the service was run from 11.00 til 16.45, this would only impact 3% of patronage observed in summer 2018, whilst cutting 25% of services. Its impact on service costs would be lower due to the fixed costs of providing a bus and a driver. The driver would



also still require a break within the schedule. Emailed Lloyds to ask what impact on cost would be

- 5.34 The first weekend and last weekend of operation showed very low passenger numbers so it could be possible to run the service for 40 days, from the first Monday or the summer holidays to the last Friday of the summer holidays, reducing operating costs by 10%.

***Type of bus operation***

- 5.35 It is possible that a community transport operator could be found to operate the service. It is likely that their costs will be substantially lower than a commercial bus operator. This was investigating prior to the 2018 pilot, but there are issues relating to the willingness and ability of local community transport operators to run a service, their ability to provide an appropriate type of vehicle for general passenger use, the reliability of volunteer staff for running a timetabled service and their ability to charge a fare.
- 5.36 These issues could potentially be addressed by not running the service as a local registered bus service, but offering it instead and asking for a donation by passengers. At the Beach Car Park, price for the bus service could be incorporated into a parking ticket.
- 5.37 It has been asked whether the school bus could be utilised for running this service whilst it is idle during the school holidays. This would not be a particularly appropriate vehicle for a Park & Ride shuttle service and there may be insurance and other challenges affecting the school's ability to loan out the vehicle, together with the above issues facing community transport operators and the issue of finding volunteer drivers.

<b>Revenue sources</b>	
Bus revenue	£4,000
Parking revenue	£5,000
Retailers contribution (8 * £50)	£400
Sponsorship	£500
Castle contribution (50p per castle entry, in addition to discount)	£500

<b>Costs</b>	<b>£14,800</b>
Cost of bus service	£12,500
Marketing activities	£2,300
<b>Possible cost savings</b>	
Reduced marketing requirements (based on fact that many marketing materials already produced)	£900
Reduced bus service (40 days, 11:00-16:45)	£10,500
Community transport operation	£6,000

- 5.38



---

## Appendix A: Additional information

### Materials for project

A range of materials were developed during the project which would help with running a shuttle bus service if it were decided to continue it in future summers.

Menter Môn has a complete record of these materials.

These include:

- Procurement brief for bus service outlining the service required
- Procurement contract for signing with successful operator
- Highways signage schedule, prepared by JTM roads signs
- Marketing materials including
  - Design logo for the Hoppa;
  - Design logo for the bus exterior branding;
  - Posters for display on A boards at bus stops;
  - A4 posters advertising the service for display around town;
  - Timetable designs for incorporating into bus stops;
  - A4 leaflets for distributing to accommodation providers and tourist information centres;
  - A5 leaflets for bus passengers, incorporating the Harlech Hoppa voucher;
  - Business cards advertising the survey;
  - On-line (SurveyMonkey) version of the survey.

### Costs for re-running the Hoppa service

Below we show the costs for the 2018 running of the service with an assessment of the costs of running the same service in a future summer.

Total project costs, excluding staff time were just under £15,000.

In italics are items that have already been produced (e.g. logos and leaflets) or acquired (e.g. A boards and fomex signs) and so overall costs could be around £14,250.

<b>Gwasanaeth/ Service</b>	<b>Cyflenwr/ Supplier</b>	<b>Cost/ Price</b>
Bus service @ £285 a day x 44days	Lloyds Coaches	£12,540.00
Bus Design & Branding	Re-Designs	£780.00
Road signage	JTM Signs	£420.00
<i>Design logo Hoppa</i>	<i>Imbyll Designs</i>	<i>£140.00</i>
<i>Design A4 leaflets &amp; posters</i>	<i>Imbyll Designs</i>	<i>£240.00</i>
Print 2,000 A4 flyers	Imbyll Designs	£160.00
Print 2,00 A5 Vouchers	Imbyll Designs	£200.00
Print Posters for Railway	Gwasg Cymru	£28.80
<i>Print A-Boards x2 £60 each</i>	<i>Gwasg Cymru</i>	<i>£120.00</i>
<i>A4 Fomex signs for Railway</i>	<i>Gwasg Cymru</i>	<i>£142.80</i>
Windchaser flags x 2	The Sign Factory	£144.00
<i>Water bases</i>	<i>The Sign Factory</i>	<i>£91.20</i>
<b>Total Project Cost</b>		<b>£14,838.00</b>

## Additional information from the on-line survey

Below we provide some additional responses to the survey, notably where overnight holiday visitors were staying, all survey respondents home location, what they liked about Harlech, and what they thought could be improved.

Respondents who were staying on holiday were asked where they were staying:

Arthog	1
Barcdy caravan park	1
Barmouth	5
Betws-y-Coed	2
Bontddu	1
Borth	1
CATechnology	1
Conwy	1
Dolgellau	3
From Goch	1
Gellilydan	1
Hafan Y Mor	1
Harlech	17
Llanaber	1
Llanbedr	1
Llanbedrog	1
Llandanwg	2
Llanfair	1
Llwyngwriil	1
Min y Don	3
Pencaenewydd	1
Pensarn	1
Pwllhelli	1
Porthmadog	1
Talsarnau	3
Talybont	2
Trawsfynydd	2
YHA Bryn Gwynant	1

Respondents who were tourist visitors were asked where their home was. 3 were from abroad, 13 from Wales and the remaining 52 from England. The West Midlands (11) and Cheshire (8) were the commonest origins, although it is noticeable that visitors came from a dispersed range of locations.

Germany	Germany	Abroad
Netherlands	Netherlands	Abroad
Charlotte, North Carolina, USA	USA	Abroad
Aberdare	Aberdare	Wales
Aberystwyth	Aberystwyth	Wales
Bangor	Bangor	Wales
Brecon	Brecon	Wales
Cf448sa	Glamorgan	Wales
Corwen	Denbighshire	Wales
Llandudno Junction	Conwy	Wales
Garndolbenmaen	Gwynedd	Wales
Llanfor	Gwynedd	Wales
Llanfor	Gwynedd	Wales

Llanaber	Gwynedd	Wales
Wrexham	Clwyd	Wales
Wrexham	Clywd	Wales
Bath	Avon	England
Aylesbury	Buckinghamshire	England
CH38EX	Cheshire	England
Ch7 3gb	Cheshire	England
Ch7 3gb	Cheshire	England
Crewe	Cheshire	England
CW84LH	Cheshire	England
Malpas Cheshire SY14	Cheshire	England
Northwich, Cheshire	Cheshire	England
Warrington	Cheshire	England
Derby	Derbyshire	England
Honiton Devon	Devon	England
GL50 3LN	Gloucestershire	England
GI52 8pe	Gloucestershire	England
sk8 7jr	Greater Manchester	England
Basingstoke, Hampshire	Hampshire	England
Leominster	Herefordshire	England
Pe210de	Hertfordshire	England
Sg7 5aj	Hertfordshire	England
St. Albans	Hertfordshire	England
Kent	Kent	England
ME4 5PW	Kent	England
Hinckley, Leicestershire	Leicestershire	England
London	London	England
UB10 8RW	London	England
HG3 5HW	North Yorkshire	England
Northampton, England	Northamptonshire	England
Alnwick, Northumberland	Northumberland	England
Abingdon, England	Oxfordshire	England
Oxford	Oxfordshire	England
Shrewsbury	Shropshire	England
Sy11 2LE	Shropshire	England
Tf93hw	Shropshire	England
st10 1qp	Staffordshire	England
Stafford	Staffordshire	England
GU1 1BT	Surrey	England
Bn25xj	Sussex	England
B459uh	West Midlands	England
Birmingham	West Midlands	England
DY8 1SE	West Midlands	England
DY8 1SE	West Midlands	England
DY8 1SE	West Midlands	England
Sutton Coldfield, B76 1XD	West Midlands	England
Ws117ll	West Midlands	England
WS149RU	West Midlands	England
Ws32aq	West Midlands	England
Ws6 6nb	West Midlands	England
Ws7 4rd	West Midlands	England
BD17 5HB	West Yorkshire	England
Huddersfield	West Yorkshire	England

Respondents were asked what they liked about Harlech and what could be improved. Their comments are provided unedited, though organised alphabetically by type of visitor.

### What do you like about Harlech?

#### Tourist visitors

Amazing views, quirky shops, great views of the castle, gorgeous dunes and beaches. Plus despite me not being even remotely able to speak Welsh locals are very friendly atmosphere

Beach fun

Beach, pleasant, views, ice cream, relaxed atmosphere, surrounding countryside and the people

Beach, view and surrounding area

Beach, views, ice cream, peace and quiet

Beach, village, pubs, restaurants

Beautiful clean beaches, lots of activities for the children. All staff happy to help - I'm a wheelchair user

Beautiful town with lots to do. Hoppa bus is a great addition especially for those days when the hill just seems a pain to climb or you just want to quickly pop up to town for an ice cream. Especially ideal for teenagers who want to pop to the town without mum and dad. We were glad to see Harlech finally have the facilities of other Welsh seaside towns e.g. St David's who also offer and benefit from this service.

Castle

Castle

Castle and fantastic views. Beautiful village

Castle and village

Castle and village shops

Castle is always a delight, as is the cafe

Castle is fantastic, great views, a handful of nice shops

Castle, views, interesting shops

Cemlyn Tea Shop

Compact and the impressive castle

Easy to walk from upper Harlech to the beautiful beach. No need to drive or use the Hoppa bus.

Love the view, country side and people.

Everything particularly the lovely welcome from the locals. The cafes are excellent and the shops interesting. Views are amazing.

Everything the shops are nice the people are friendly the castle is a must see even though I have Warwick castle on my doorstep I still returned for a second visit in a year

Friendly

Fun

History / heritage

I like the castle and the views

I liked the fact that it hadn't been modernized to a great extent and the castle was still kept in good condition after hundreds of years.

I love everything about harlech , walking up to the castle hard work but love it , nice walk up to the beach and walking to the rocks ,it is extremely relaxing and calming atmosphere x

I visit approx 6 times a year. Love the friendly feel of Harlech, the beautiful views, quirky shops and delish eateries.

Interesting/quaint shops and castle

It feels cosy and tucked away

---

It was clean and not too busy. The pharmacist was incredibly lovely. Dr Luff was the nicest doctor I've ever met. The Catholic priest and parishioners were very welcoming. The beach was beautiful and I liked the area for no dogs although people broke that rule a lot. The independent shops were very classy.

It's quiet & quaint little village, love the Castle & new information centre

It's where I grew up, and it's lovely to be able to take my family there.

Love the friendly atmosphere and the cafes

Love the little shops in upper harlech, the premier shop by the beach road is excellent too. The beach in harlech is fantastic and the rail service is excellent

Lovely little town and beautiful castle with stunning views. We enjoyed a gorgeous ice cream, moving on for coffee and cake at the cafe near the castle, finally going for a walk and paddle on the beach. A wonderful place to spend a few hours.

not a lot

Not as busy as other towns on the coast

Peace. Beach. Links for railway

People and activities

Picturesque town, lovely shops to browse and buy, friendly people. Good quality food and gift offerings. Visited castle last time - great experience, especially view from cafe.

Quaint, wonderful views of beach & mountains.

small and friendly

Small friendly little town

The beach

The beach, the shuttle bus, the shops and cafes, the general atmosphere, the beautiful castle, the little winding streets, the views.

The bus hoppa!! Very handy Shops castle and climbing wall and swimming pool fantastic

The castle

The castle

The castle

The castle Great coffee shop with amazing cakes and scones

The castle and surrounding view

The castle and views

The castle is magnificent

The castle is wonderful

The castle itself and the shops around.

The castle was absolutely beautiful, lovely village and stunning beach

The castle was great to explore. The town was very pretty with lots of nice shops and great views of the beach and surrounding areas.

The castle, and very pretty village

The castle; the ambiance; the hiking nearby; having lunch at Bwtry Bach

The castle was more complete than expected. The visitor centre was very good selling a range of local goods. We bought some local beer and jewellery.

The food offer is very good. Excellent views.

The friendly locals and lovely shops

The state of the castle and the view. Marvellous

The town in upper Harlech has a lovely old feel and full of character

Unusual shops

Views

Views and the history

Views, beach

We like to visit each year and park in the theatre ca park and walk up the path that comes out by a bench overlooking the bay. The view is spectacular. We like to visit the shops and to see the changes that happen from year to year - the new centre at the castle is great and it gives tourists the chance to sit and have something to drink while enjoying the views.

What's not to like

### Visiting friends and family

The opportunity to visit with family and old friends

Beach and town , friendly shops and lovely food at As Is restaurant , really enjoyed our visit .unspoilt beach and town .

Beautiful views

Everything

Having the park and ride helped a lot in avoiding the traffic congestion in the town

I love Harlech. Its where I grew up and return to as often as possible.

I was born here

It's very historical and very beautiful. Everyone is very friendly and employees in shops are very kind.

Knight School at the castle

Picturesque, the beach and on cool morning we went to the seeing baths

The castle.

The diverse shops, the cleanliness and its character

The pop up tikka bar and shop. Asis restaurant. The castle. The pottery.

the quaintness and people

### Shopping

Beach

Beautiful setting, friendly shop keepers, lovely little shops

Everything, it was a beautiful place, the sights was breathe taking. The beach was lovely an clean, loved the fact there was doggie bags attached to the fence in case the dog owners forgot theirs.

Friendly people, love the castle and the cafe

Harlech Pottery, the new cafe at the castle, the new delicatessen near the castle, and the ice cream/chocolate shop.

Shops, friendliness of shops especially season and reading on the corner

### Other

Beach Swimming pool Castle Walks

Everything

Fabulous beach and scenery, good cafes. The Hoppa Bus was brilliant !

Good little town.

History, cafes ,views.

It's a lovely little town, the castle cafe is wonderful for coffee and a brilliant addition to the town.

### What could be improved?

#### Tourist visitors

1. I think the Hoppa is a great idea! I hope I will be able to make use of it on my next visit. 2. I do hope a pub will open/reopen in Upper Harlech. I miss the Lion.

A different route to the castle carpark - it was horrendous.

A good pub in upper Harlech. Improved walkways and signage.

A more exciting film

Better parking options

Better paths/pavements. Make it more pedestrian friendly

better signage

car access through the town needs thinking about. I visited on bin day and it was absolute chaos

Car parking, lots of empty shops, everything seems based round the castle

Clearer signs for parking for the castle.

Could pedestrianise roads by castle, and clearer parking out of centre



---

Definitely more info signs for the hoppa bus save people parking near castle so we could enjoy the walk around more with our child with out fearing the passing cars may be drop the car park fee a little at the beach to help once you add that the bus and entry to castle with a refreshment or two even with discounts it is still an expensive visit

Easier access to the beach for wheelchair users.

Fewer hills!!

Food! There was literally nowhere to eat in the evenings, that was child friendly. No pubs, no tapas, no fish & chip shop, just one rather pricey restaurant. Luckily we had a self catering cottage, and spar sells fish fingers, but it didn't really give me a break from cooking.

footpath or no parking on high street from carpark to shops castle

Free parking, it's quite expensive especially if you intend to go to the castle then have something to eat & you have to travel by car if your not staying in Harlech

Having some actors in peak season to act different parts of the castles history.

I believe that Harlech was extremely enjoyable and I don't think that it could've been improved any.

I think in the height of summer the main road through upper Harlech is a NIGHTMARE! The road is narrow and with parked cars one side it can be a squeeze to get through. Not sure what the solution is but it seems to get busier every summer.

I think the parking at the beach for £3 is extortionate, considering it's only £1.20 in nearby llandanwrg

I would like to see the path up to the town from the theatre cut back a bit as it has become overgrown but I guess that is because the college has closed. We often see an art exhibition on in the hall by the castle and I would like to see a permanent craft/art shop there. Miss the post office and the books and cards it sold.

Improve direction signs from bus stop to castle etc. Advertise the Hoppa as a Park and Ride maybe?

Larger pavements (we were with coaches) A Welsh-language service everywhere it would be ideal. We really enjoyed Harlech

Less traffic in the centre, and it would be great if the shoe shop were open in the week! I do understand the reasons it's not though!

Locals rate

May use Hoppa next time Market?

More dog friendly restaurants. This year we have a dog as part of our party and found it limiting where we could get a meal. We ended up cooking more than usual/eating out less as dogs are only really welcome on terraces e.g. la plas and castle cafe. In the rainy/cold evening this obviously doesn't work. The sweet shop cafe has only one table where dogs are allowed and when taken, we ended up walking past and going without our holiday treats. As to leave a dog in a caravan is not recommended, please, please can we have more dog friendly eateries.

More parking facilities

more shops

More shops and events on in the castle. Shame the evening food in the castle bistro has stopped.

More shops and more places to sit and enjoy the beautiful views

More shops especially for locals

More varied shops

N/A

No

No dogs in castle

No parking on smaller streets

Not sure there is anything

Nothing

nothing

Nothing  
Nothing  
Nothing  
Nothing I love it!  
Nothing its perfect  
Nothing needs improving  
Nothing, it was perfect 😊  
Nothing, we enjoyed our visit  
Nothing. Love it.  
One way traffic system or pedestrian only and parking permits.  
Parking in upper Harlech  
Parking is a little tricky and access for vehicles was generally quite difficult due to on-street parking, but it may be difficult to resolve this.  
Pedestrians only on the high street, more seats, improve the kids playground more interactive events in the castle and surrounding countryside history walks and talks etc  
People need to be warned it's a good 15 min walk to the beach....  
Pity the pub has closed  
Shopkeeper in the *name of shop* was horrible and rude. Would avoid at all costs in the future  
Sort out the traffic issues in town. It makes it v he difficult for people in wheelchairs or with pushchairs  
Sunshine every day.  
Toilet facilities both in the town centre, on the road below the castle and on the beach car park. They need to be cleaned more often, hand washing and drying facilities need to be improved  
Traffic, more frequent buses  
Was very windy which wasn't a problem apart from at the top of the castle. Could do with higher barriers to be safer especially as I had children with me.  
Weather permitted

### Visiting friends and family

Being disabled more parking for the disabled  
Can't think of anything  
Derelict hotel .....st David's ? Such a blight on Harlech . Needs to be developed ? Urgently !  
For someone to refurbish the college and theatre not allow any new work to spoil the present environment, things like modern glass and concrete buildings  
More eating places  
Nothing  
Nothing  
Nothing I can think of.  
Public transport (trains and buses except for the Hoppa) passes through the town more often  
Seeing less litter in the overflowing street bins  
somewhere to have a drink and a bar snack  
That the hoppa could be used by local people who live near the garage  
The swimming baths  
To make my visit more enjoyable, I would like the town council to empty the bins, especially the one in front of the castle near the statue.  
Where do you park for the park and ride service?

### Shopping

Free/low cost parking season ticket  
Less empty shops  
Nothing really, I visit Harlech at least once a year and like its individuality.  
Parks be a bit tidier  
The up town was dead come 9pm, nothing was open apart from a few take away. No pub or atmosphere in the village.

---

The visit we had was amazing, we have made some very lovely memories that we will be able to tell our grandchildren. And hopefully they will go, and see just how breathe taking it is.

**Other**

Encourage more opening consistency of some of the restaurants in the evening. It's hard knowing if the eating establishments open in the evening Demolish st David's hotel and college block Re vitalise the Harlech funicular railway scheme as feel this would be a better long term 'green, solution re transport/parking issues. AND able a tourist attraction in itself especially as CAT Machynlleth seems quiet these days.

Extend the season for the Hoppa Bus.

It's probably impossible but car free streets would be brilliant, also, like other towns, empty shops are an eyesore. the Hoppa service is a good way of improving the parking situation.

More things for the kids to do

Pull down the tower block and old St David's hotel

Reopen some of the closed shops.

---

# Martin Higgitt Associates