

**energy
saving
trust**

Decarbonising travel and transport in the tourism industry

Round table report

January 2023

Richard Drew
Regional Account Manager
Local Government Support Programme
Version number 01



Executive summary

A round table discussion took place on Monday 9th January 2023 to:

- consider the challenges and pressures facing the tourism industry regarding sustainable travel and transport
- understand the support the tourism sector needs to decarbonise travel and transport

There were 20 attendees representing 18 different tourism focused organisations. This was a useful but incomplete sample of the tourism industry.

The round table sought insights about the current level of provision and demand for electric vehicle (EV) charge points.

Key findings were:

- EV chargepoint provision is important for tourism destinations and organisations
- Significant opportunities exist from greater demand for EV charging by visitors
- There are additional benefits for staff and/or fleet requirements
- The most significant challenges when installing EV charge points are:
 - cost of providing the infrastructure
 - limited capacity of the power grid in rural locations
- Other challenges include:
 - complex additional issues for NPAs
 - communicating with DNOs (District Network Operators)
 - extra planning rules for conservation areas and/or world heritage sites
 - installing and maintaining the charging equipment
 - selecting, and future proofing, the right technology
 - rural digital connectivity
 - unclear responsibility for delivering EV chargepoints
 - payment apps
- A range of solutions are available
- Contacting DNOs early to discuss the scope for adding EV infrastructure is vital

Key actions outlined in the report are:

- Identify any funding sources to support the sector – including outlining concerns over lack of funding with government departments
- Research the range of possible solutions to speed up the roll out of EV infrastructure in the sector
- Develop guidance materials to support the sector in decarbonising transport

- Conduct further research regarding the perceived skills gap in delivering EV infrastructure and maintenance in some regions
- Engage more closely with DNOs to create stronger working relationships to help manage issues relating to power grid limitations

Energy Saving Trust will also follow this up by preparing some case studies featuring real examples of provision for low carbon travel in the tourism sector.

1. Contents

2.	Introduction	5
2.1.	Organisations represented	5
2.2.	Current levels of demand for EV charging	6
2.3.	Charging provision for staff	7
2.4.	Demand for EV charging from visitors	7
2.5.	Concerns regarding providing for EV charging	8
3.	Roundtable discussion	9
3.1.	Importance of providing for EV charging	9
3.2.	Opportunities arising	9
3.3.	Benefits for staff and/or fleet	10
3.4.	Key challenges	10
3.5.	Solutions	12
3.6.	District Network Operators (DNOs)	13
4.	Next Steps	13
4.1	Follow Up Actions	13

2. Introduction

To meet the UK's target of reaching net zero carbon emissions by 2050 or sooner, the Department for Transport commissioned Energy Saving Trust's Local Government Support Programme to support local authorities to decarbonise travel and transport in their local areas. To do this, it is vital to engage with a wide range of stakeholders and sectors. The tourism sector is a significant potential producer of CO2 emissions because many visitors travel by car to holiday destinations and visitor attractions.

Research¹ conducted by Visit Britain has highlighted some interesting trends amongst the visitor economy. For example, more than a 1/3 (37%) of visitors to Britain stated that they have used public transport or greener alternatives when on holiday, while 35% stated that difficulty in accessing low-carbon modes were a barrier to engaging in sustainable tourism behaviour.

We held a roundtable discussion to:

- understand the needs of the tourism sector
- identify how Local Authorities can support tourism stakeholders
- inform central government policy

2.1. Organisations represented

The roundtable included representatives from a range of organisations including tourist boards, academia, local authorities and other public sector bodies (see Figure 1 below).

The full list of organisations represented were:

- Northumberland National Park Authority
- Lake District National Park Authority
- Grimsthorpe and Drummond Castle Trust Ltd
- Dr Nikolas Thomopolous, lecturer in the Department of Tourism and Transport, University of Surrey
- Historic Houses
- Shakespeare's England
- Innovate UK KTN
- Warwick District Council
- Isle of Wight Council
- Cumbria Tourism
- Penshurst Place Estate
- Iford Manor Estate
- The Walsingham Estate

¹ MIDAS: A Global Report – Motivations, Influences, Decisions and Sustainability in a Post-Pandemic Era. [MIDAS - full report \(visitbritain.org\)](https://www.visitbritain.org), Kubi Kalloo; December 2022

- Blenheim Palace
- Visit Britain (N.B not present during the session but completed a follow up call with Energy Saving Trust)

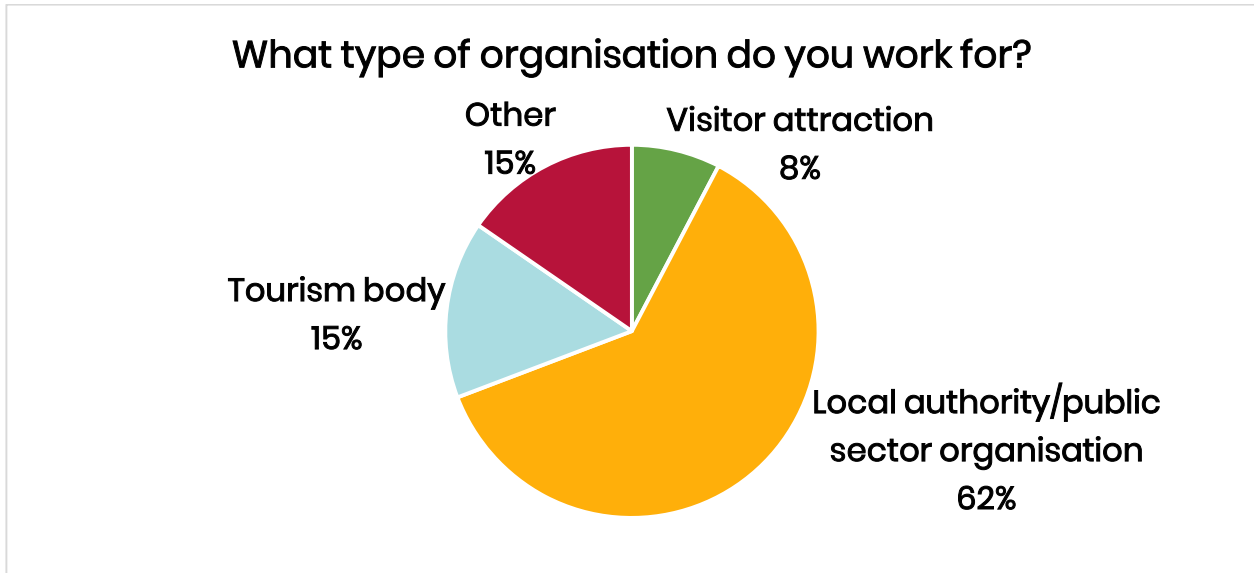


Figure 1: What type of organisation do you work for?

Local authorities and other public sector bodies, in this case National Park Authorities, were well represented. National Parks are significant tourist destinations and – due to their designated status and very rural, remote locations – pose challenges to ensuring low carbon travel within their boundaries. So, it was very useful to have input from NPAs.

However, the group size present did not fully represent all tourism stakeholders, so the conclusions were of interest but were not authoritative for the whole tourism sector.

2.2. Current levels of demand for EV charging

We began by asking about the demand for EV charging and any concerns arising.

Q1. Do you already have EV chargepoints on site?

77% did, and 23% did not. This was encouraging, suggesting that the sector, including SMEs, are considering providing EV charging infrastructure on site.

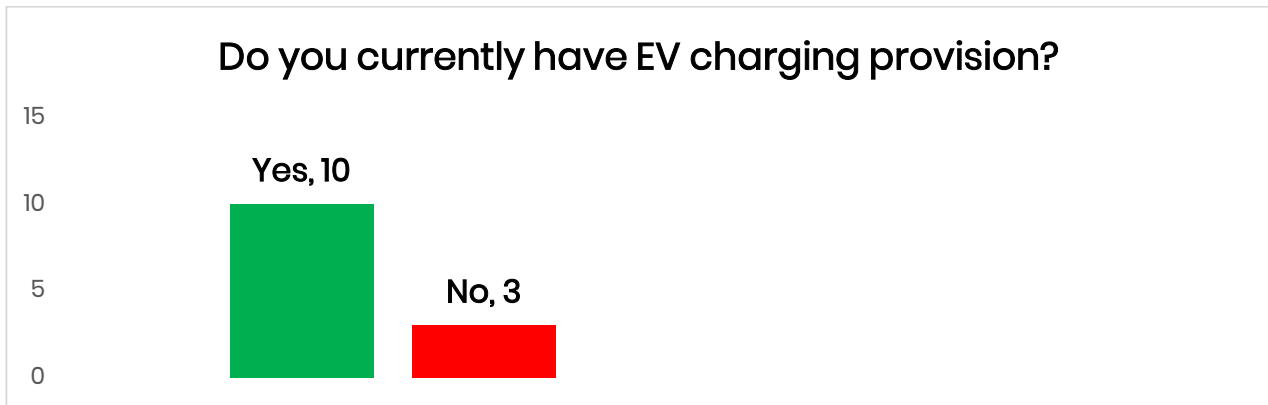


Figure 2: Do you already have EV chargepoints on site?

2.3. Charging provision for staff

Q2. Do you currently provide EV charging on site for staff?

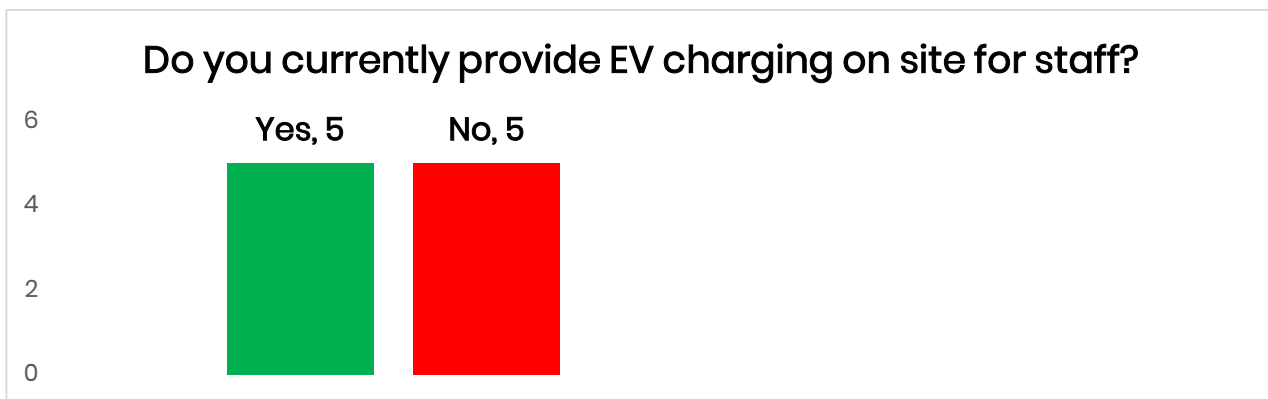


Figure 3: Do you currently provide EV charging on site for staff?

50% did provide for staff to recharge an EV; 50% did not. Though encouraging, more progress is needed. Staff need to be able to travel to and for work using low carbon solutions. [NB: councils and academia mostly provide no EV charging facilities specifically for tourists].

2.4. Demand for EV charging from visitors

Q3: Do you find there is demand for EV charging from visitors?

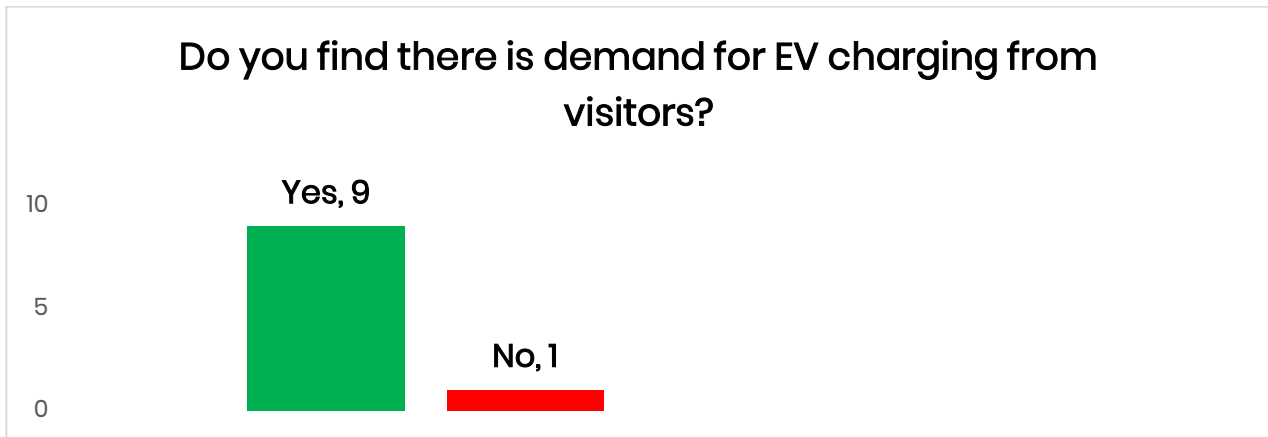


Figure 4: Do you find there is demand for EV charging from visitors?

90% did have demand for EV charging from visitors, and only 10% did not, confirming there is demand for provision and suggesting there is potential income for the sector.

2.5. Concerns regarding providing for EV charging

Q4: What are your concerns about providing EV charging infrastructure?



Figure 4: What are your concerns about providing EV charging infrastructure?

The main concerns raised were:

- cost of providing infrastructure
- limited grid capacity, especially in rural areas

3. Roundtable discussion

3.1. Importance of providing for EV charging

How important do you think EV chargepoint provision is for your destination/ organisation?

The overwhelming consensus was that providing EV charging is vital due to:

- The 2030 ban on selling new petrol and diesel cars/vans
- The need for tourism sites to remain competitive
- Those seeking '[Green Tourism](#)' status by providing for EV charging will enhance their sustainability credentials
- Many sites are inaccessible except by private car
- A small but growing minority of visitors come by EV
- EV ownership is growing and so destination charging must also grow

Rural public transport was also a concern:

- Residents who have no car and live near to key attractions, and particularly within national parks, will need access to public transport, but current services are often limited
- Better services are therefore needed, using low carbon solutions

Follow up actions:

- Further research into opportunities to expand EV infrastructure provision
- Further research into how to expand low carbon public and/or shared transport

3.2. Opportunities arising

What opportunities are there from greater demand for EV charging by visitors?

All present agreed there are benefits in providing EV charging on site:

- To meet environmental goals
- To help meet the UK government's goal to be net zero by 2050
- Longer visitor dwell times will lead to spending more in cafes & gift shops
- To gain competitiveness by attracting EV driver visitors, especially where there is a limited EV charging network locally

3.3. Benefits for staff and/or fleet

Are there any additional benefits for staff and/or your own fleet requirements?

Other benefits included helping to retain staff, and providing hassle-free operations for those sites using large EV fleets.

Follow up actions:

- Consider developing a **marketing campaign** for tourism destinations
- Consider preparing **guidance** for the tourism sector

3.4. Key challenges

What are the biggest challenges faced by tourism operators, visitor sites, and organisations installing EV charging for visitors?

Everyone was positive about EV charging, but there were two main concerns:

Rural power grid capacity is limited. Some rural areas are off grid altogether. Urban areas are often prioritised for improving grid capacity and connectivity.

Costs of upgrading underpowered rural grid capacity is a concern. CPOs often will not invest in rural areas as the business case to install and maintain chargepoints is weaker than in urban locations (being more profitable and with fewer DNO issues). Rural sites worry they will have to fund very costly grid upgrades (Note: from April 2023, OFGEM are introducing RII0-ED2 price controls which will regulate and hopefully reduce the revenues DNOs can collect from grid reinforcement works).

Apart from those two main concerns, there were others, as follows

National Park Authorities have specific concerns; they are:

- Ineligible for government grants even though they have residential populations living within their boundary
- Poorly placed to attract significant funding for extremely remote sites
- Limited in what they can provide on-site
- Limited in what they can provide for residents living within their boundaries
- Delayed when wanting to install EV chargepoints as they must deal with multiple highways authorities within their park boundary

Poor communications within DNOs can cause problems. For example, one site wanted to install EV chargers and an on-site solar farm; but the power grid could not support multiple chargers. When asked for a solution, the DNO said there was enough grid

capacity, from a planning perspective, for current demand so there was no need for a solar farm.

Conservation areas or world heritage sites have additional planning constraints to contend with. Civil works must have minimal impacts locally. Chargepoints must meet local conservation requirements, which often means higher costs.

Installation and maintenance of equipment: This is a challenge, especially in parts of the northwest. There is a lack of skills locally to build EV charging infrastructure and provide effective ongoing maintenance. This happens regardless of how much funding is available and/or preparatory development work is done. Maintaining existing EV chargepoints requires much work, time and effort to ensure it is done properly.

Technology selection and future proofing: Sites worry about whether costly charging technology will be suited to the local environment and/or if it might become redundant or outdated once built. Also, as EV ranges increase, will there be demand for low power chargepoints? Site operators need advice on which kit to select that works best for their location. This concern is perhaps the easiest to manage and educate around but is important to understand and take steps to mitigate.

Rural digital connectivity: limited mobile phone and/or internet connections – needed so EV chargepoints work properly – pose extra difficulties in rural areas.

Unclear responsibility for delivering EV chargepoints: is it the highways authority (or authorities), site owners, or are multiple stakeholders involved? When responsibility for EV charging is unclear or shared between bodies, it risks a piecemeal, non-integrated approach.

Payment apps are all different, requiring EV drivers to download and understand multiple apps, all of which risks giving a poor user experience.

Planning and route connectivity: In follow up conversation with Visit Britain, this was identified as a potential challenge. Planning decisions should factor in the visitor economy and consider what additional demands may be placed upon any infrastructure installed. Local Visitor Economy Partnerships can help by liaising with planners and should be given a chance to influence on a local level with planners. Final mile consideration is key: how can we get visitors them to locations using less carbon intensive modes, i.e. rural sites not close to mainline stations?

Funding: infrastructure changes require support to ensure funding enables a long term lens, rather than a short term fix

Follow up actions:

- Identify scope for potential funding sources

- Raise funding concerns with government stakeholders
- Raise the regional skills gap with CPOs and FE colleges to look for ways to upskill the local workforce
- Engage with technology suppliers, Innovate UK, research establishments (including [Connected Places Catapult](#)) to better understand what the limitations are and how these can be minimised
- Create stronger working partnerships between local authority transport and highways planning teams and local visitor economy partnerships to ensure that the sector is considered during the planning process for implementing EV infrastructure

3.5. Solutions

What solutions/alternatives could work and what is needed to facilitate this?

Lively discussions identified some suggestions (not all are deliverable in the short term):

- To minimise the need for visitors to bring their own private vehicles, consider offering alternatives, such as offering car club vehicles, and/or micro-mobility (hiring a bike, e-bike or e-scooter)
- Collaborate more between tourism organisations, by pooling resources to jointly fund EV charging or alternative travel options
- Consider installing cable gullies in pavements, where space and/or cost is an issue, particularly in more urban locations, to charge EVs at the roadside using domestic power supplies
- Provide chargepoints with tethered cables (in areas where security is not an issue) to avoid the risk of visitors' cables becoming locked in a chargepoint or damaged during use
- Consider induction charging particularly where accessibility for disabled users is an important consideration
- In areas with limited mobile phone or internet connectivity, consider 'plug & pay' charging, whereby the car recognises the chargepoint and payment happens directly without needing an app or contactless payment. It should be noted that we are reliant on OEM manufacturers to deliver this technology – currently only Tesla provide this solution with their supercharger network.

3.6. Distribution Network Operators (DNOs)

Have you had any contact with DNOs to discuss the scope for EV infrastructure provision?

(Distribution Network Operators: one of 6 utility companies that connect the high voltage power grid to homes, businesses and industrial electricity users)

Not many present had liaised or worked closely with their DNO.

When investing in grid strengthening, DNOs prefer urban sites as they are more profitable. That risks creating rural charging ‘deserts’. Rural EV drivers will then add to charging demand in urban areas. Tourist visitors will also need to recharge at destination sites away from urban areas.

In South Warwickshire there are three different DNO offices to engage with. A single point of contact would be most useful to support EV chargepoint roll out.

Certain DNOs (ENW, SSEN) have been particularly supportive for expanding EV infrastructure at tourist sites in their regions. SSEN have produced a report (based on research in the Isle of Wight) that offers solutions for on-site charging.

Follow up actions:

- Engage more with DNOs to improve working relations and understand the scope for expanding EV charging infrastructure across the regions served
- Develop case studies about successfully improving grid capacity

DNO response (from SSEN):

The suggestion that DNOs focus more on urban sites as they are profitable is untrue. DNOs recover the same margin of costs from supporting new connections whatever the location, however the costs may vary significantly and this is where Charge Point Operators may prefer urban sites because the costs to connect may be lower than in rural locations and the charger usage may well be higher, which would result in those urban sites being more profitable for them, which is where you can end up with organisations cherry picking sites. We aren't focussed on profits like that, but are very much focussed on fairness and ensuring there's service provision for customers across the country, no matter where they live.

4. Next steps

4.1. Follow up actions

In addition the solutions to the key challenges outlined during the discussion and identified in section 3.5, we have pulled together the actions identified throughout the conversation in table 1 below

Section	Follow up actions
3.1 Importance of providing for EV charging	Further research in to opportunities to expand EV infrastructure provision
	Further research into how to expand low carbon public and/or shared transport
3.3 Benefits for staff and/or fleet	Consider developing a marketing campaign for tourism destinations
	Consider preparing guidance for the tourism sector
3.4 Key challenges faced by the sector	Identify scope for potential funding sources
	Raise funding concerns with government stakeholders
	Raise the regional skills gap with CPOs and FE colleges to look for ways to upskill the local workforce
	Engage with technology suppliers, Innovate UK, research establishments to better understand what the limitations are and how these can be minimised
	Create partnerships between local authority officers and local visitor economy partnership representatives to ensure the tourism sector is considered when developing EV infrastructure networks
3.6 Distribution network operators (DNOs)	Engage more with DNOs to improve working relations and understand the scope for expanding EV charging infrastructure across the regions served
	Develop case studies about successfully improving grid capacity

Table 1: Follow up actions

Our next step in this process is to share the content of this report with a range of key stakeholders and begin working to achieve the follow up actions where possible. Energy Saving

Trust have begun the process of developing case study materials and will update this report with these case studies once complete and the results of any work towards achieving the follow up actions identified here.