



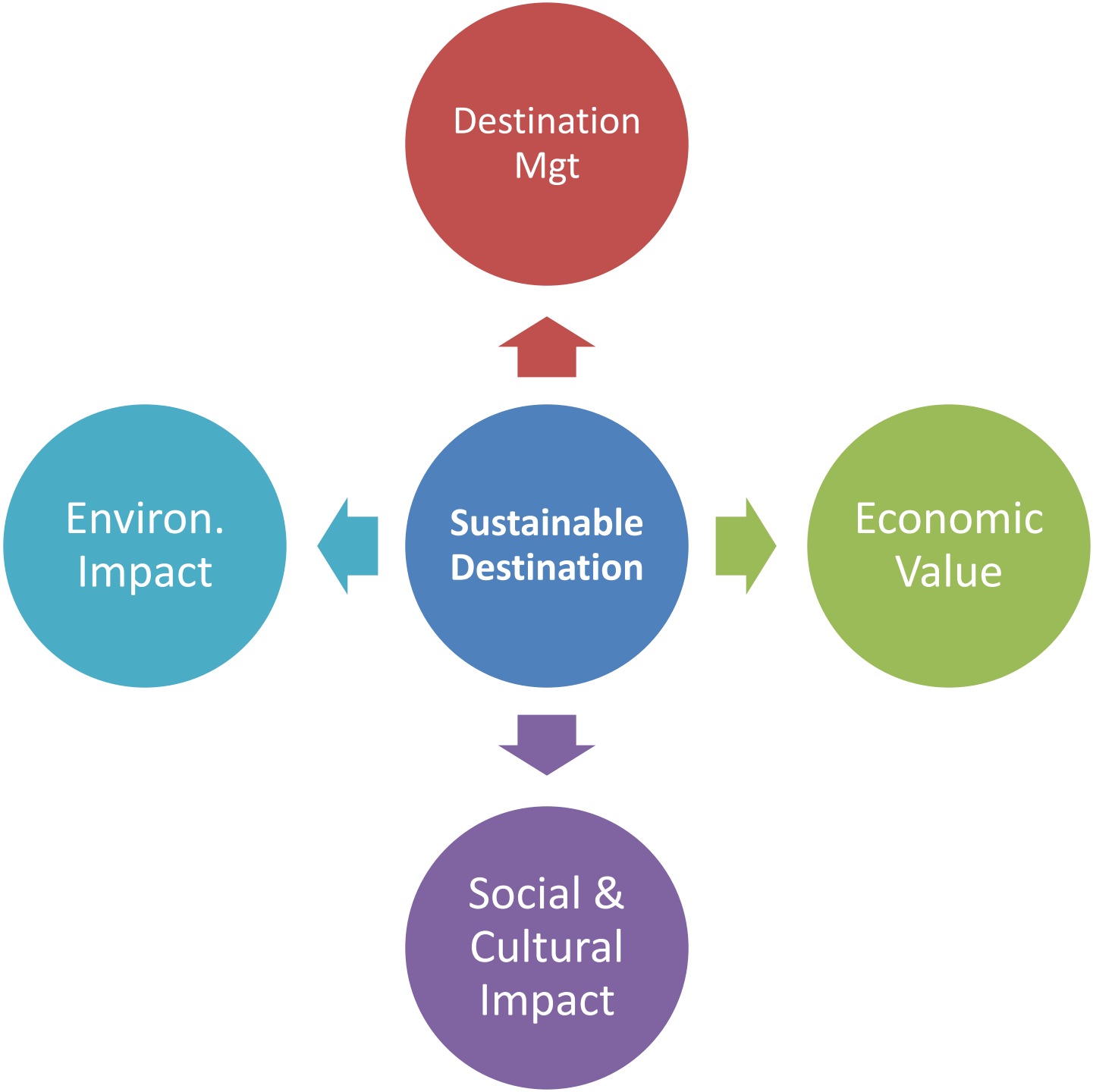
# A collective approach to destination management

Transport Impact in the Burren & Cliffs of Moher Geopark

# Principles of ETIS

**“Engaging a group to come together and work together to collect and report information is a powerful way to undertake effective destination management”**

- Shared decision-making**
- Shared responsibility**
- Shared ownership**



# Example: Reducing Transport Impact

Modes of  
transport used to  
get to destination

Average km  
travelled to get to  
destination

Modes of  
transport used  
within destination

*Impact on Residents?*

*Quality of Experience?*

# Burren & Cliffs of Moher Geopark Life Programme Visitor Survey



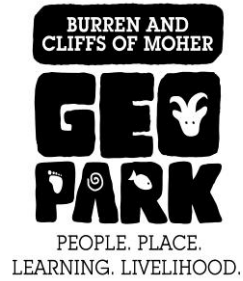
BURREN AND  
CLIFFS OF MOHER



PEOPLE. PLACE.  
LEARNING. LIVELIHOOD.



# A STUDY OF BUS / COACH TOURISM 2014



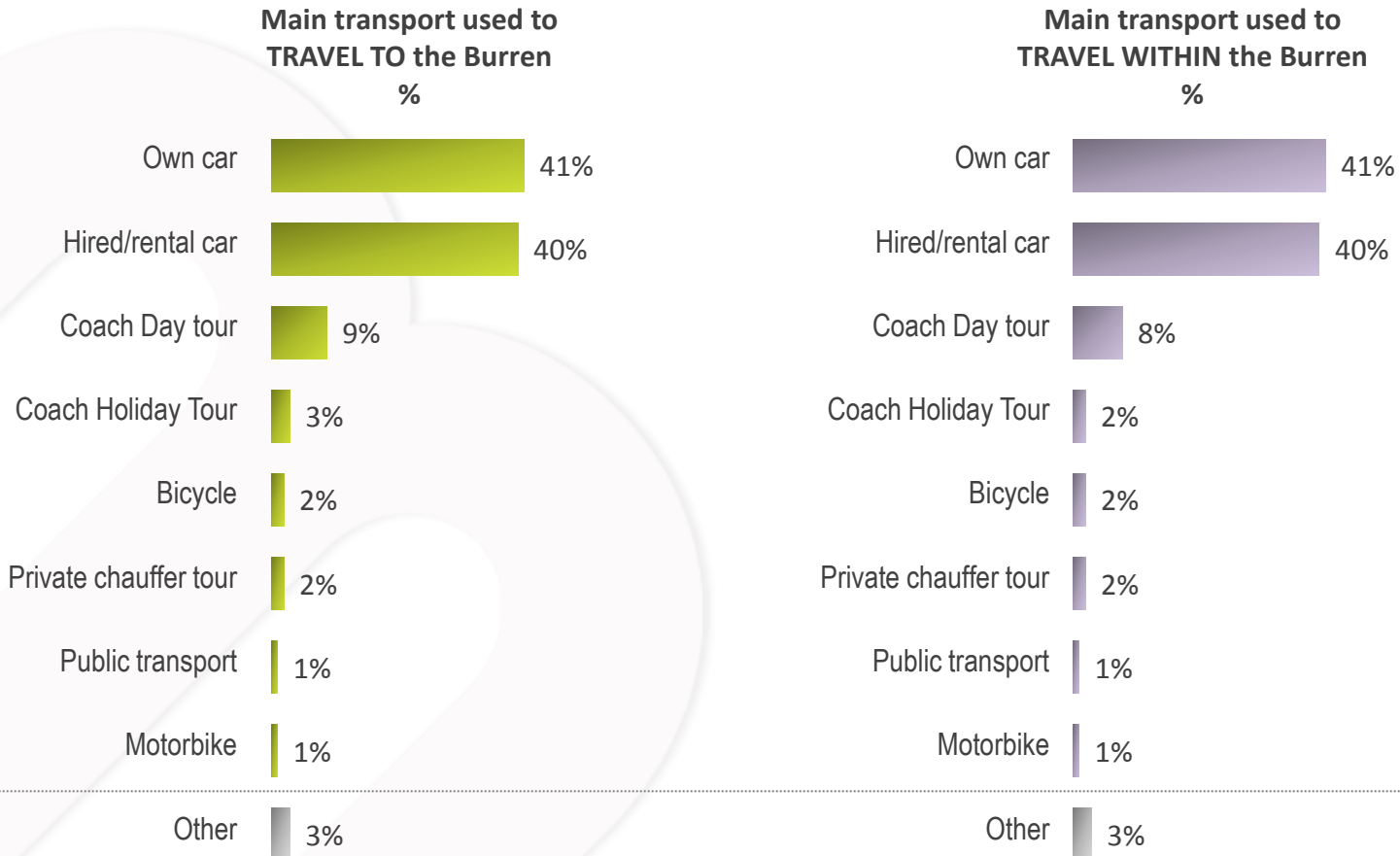
What we now know...

# Modes of Transport

Travelling by car is the most popular mode of transport for visitors



Base: All, n=533



Q.10 What is the main type of transport you used to travel to the Burren?

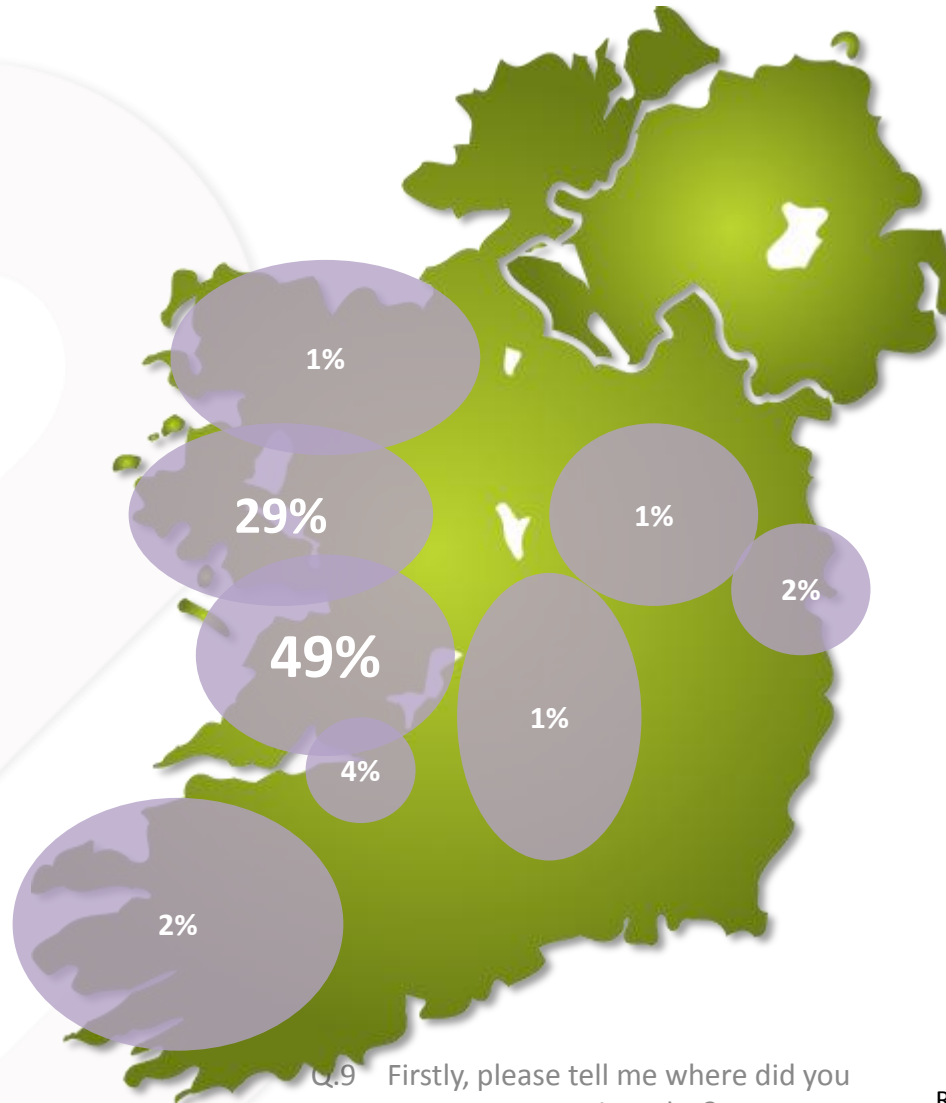
Q.11 What is the main type of transport you are using to travel within the Burren?



# The majority of people have travelled from Clare & Galway region on the day



Base: All, n=533



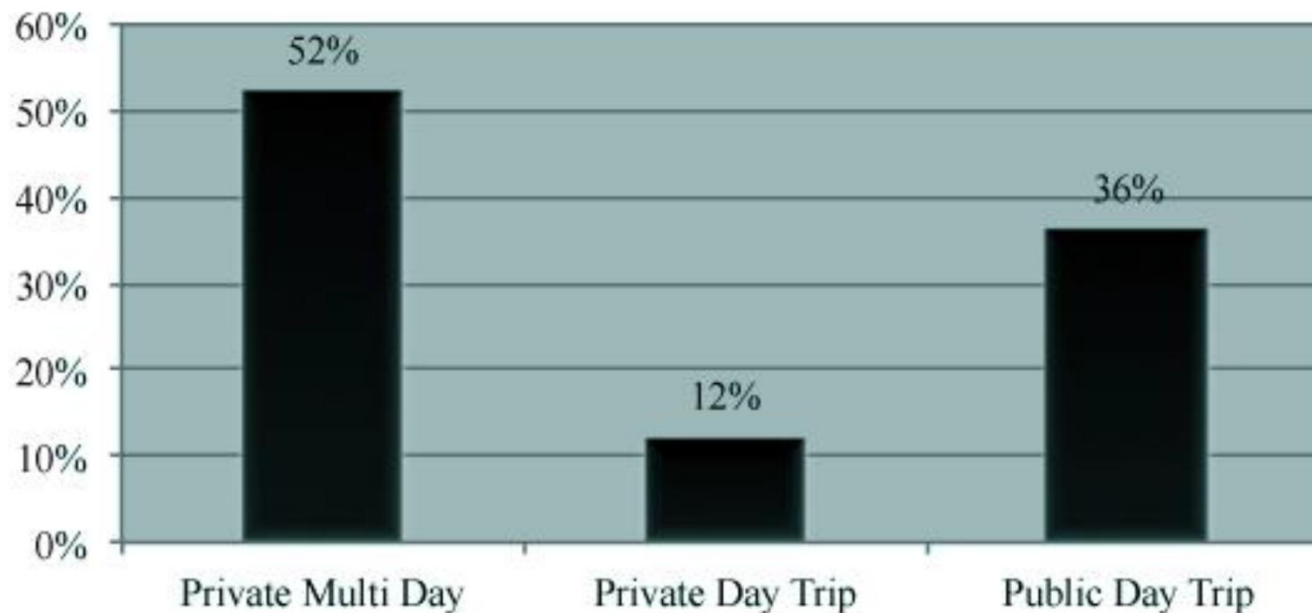
Shading indicates area covered

Q.9 Firstly, please tell me where did you start your trip today?

Refused 11%

# Breakdown of Bus Trip Types

- Private Multi Day = overnight tours usually of 3 -14 days duration
- Public Day Trip = mainly ex. Dublin or Galway, visiting Cliffs of Moher and some picture/brief walking opportunities in the landscape. Sold directly to the public - hence needs National Transportation Authority route licence
- Private Day Trip = e.g. primary and secondary school trips, urban language schools, active retirement groups and specialist interest groups



# 2014 Overview



- **21,152** Bus Visits Carried **571,000** passengers in Geopark
- During July and August, **115** buses carried an average of **3,180** persons each day
- On the busiest day, **145** buses carried **3,900** passengers

These figures demonstrate growth that goes beyond a rebound from recessionary lows in the period post-2008. The number of buses visiting the Cliffs of Moher Visitor Experience has almost doubled (98.3% increase) in 5 years: **9,065** in 2009, **15,672** in 2012, **17,980** in 2014

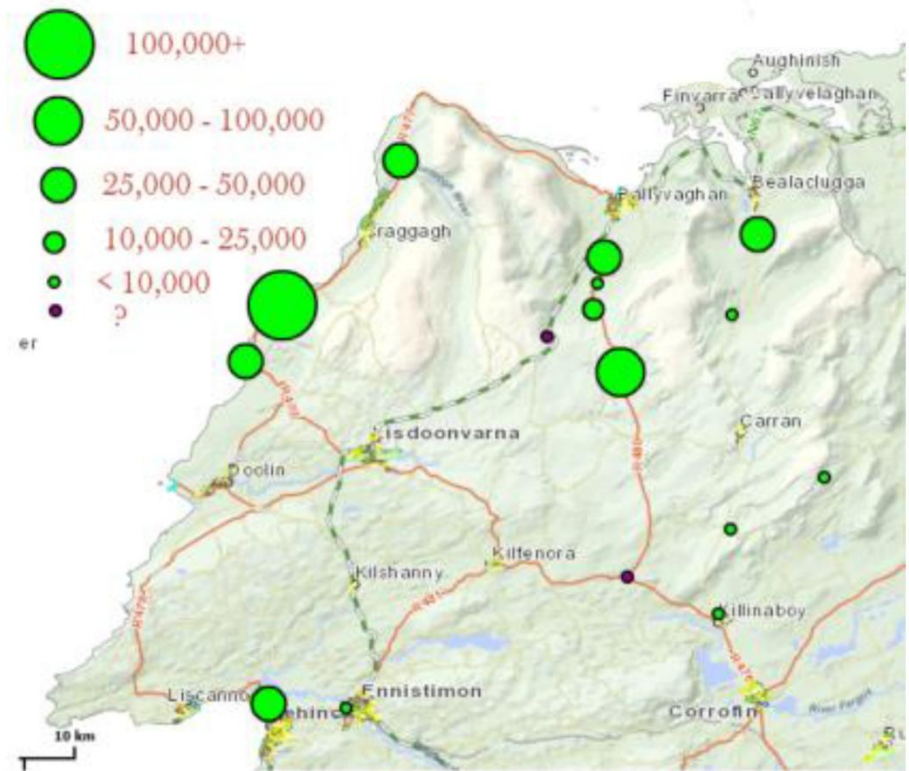
# Where do they Go? 1) Pay-for Sites



- **86%** of all bus passenger visits to Visitor Centres were to the Cliffs of Moher Visitor Experience
- **17,980** buses carried 485,963 passengers to the Cliffs of Moher
- **2,957** buses carried 78,121 passengers to next 10 commercial sites. – Aillwee Cave, Caherconnell, Burren Centre (Kilfenora), Rock Shop, Smokehouse, Lahinch Seaworld, Doolin Cave, Burren Walks, Cusack Centre, Burren Outdoor Centre

# 550,000+ Stop at 'Free' Sites

<i>Alladie</i>	180,000
<i>Poulnabrone</i>	99,000
<i>Ballyreen</i>	60,000
<i>Lahinch</i>	60,000
<i>An Rath</i>	45,000
<i>Corcomroe</i>	35,000
<i>Murroughtoohy</i>	25,000
<i>Ballyalban Hill</i>	18,000
<i>Cahermore</i>	5,000



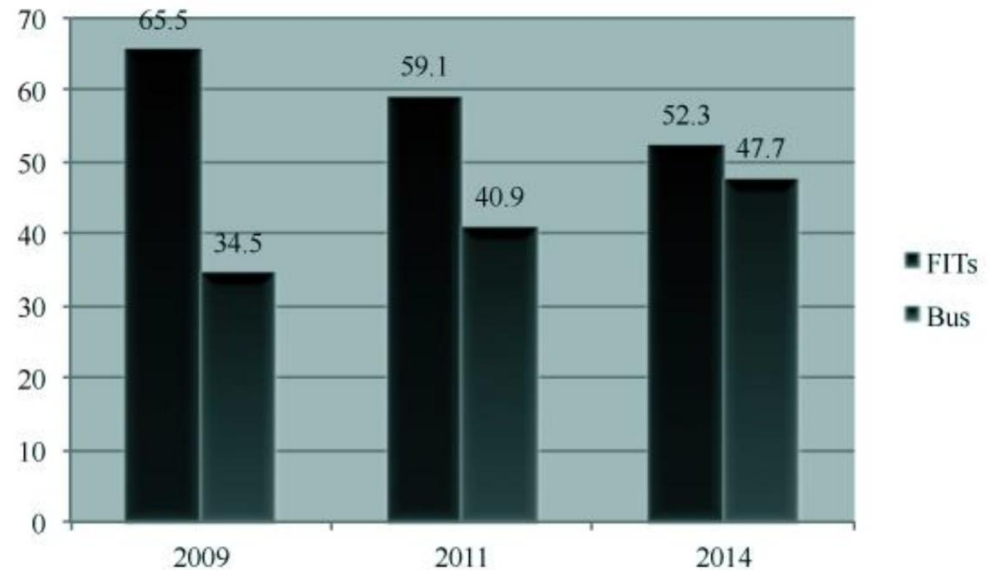
# Trends – Bus Passengers vs FITs (Fully Independent Travellers)



Visitor Breakdown at  
Cliffs of Moher Visitor  
Experience -  
% FITs and Bus  
Passengers

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Steady and significant  
change in period 2009 –  
2014. Bus passengers  
now comprise almost  
half (47.7%) of all  
visitors to COMVE



## Economic Impacts



Bus tourism supports 235 FTE (full-time equivalent) jobs in the Geopark area and

Yielded €6.9 million in income including €2.5 million in lunches, €2.25 million in accommodation and €1.4 million in visitor entry fees. (Remainder on refreshments and entertainment)

*These figures exclude retail sales which were not included due to difficulties in deriving accurate information. All 485,963 bus visitors had at least one shopping opportunity (Cliffs of Moher) and 48% had an opportunity to visit at least one other retail outlet. Income is likely to be in excess of €2 million.*

# Huge Growth of Day Trips since 2010



- 36% of bus passengers, (171,361 pax), travelled on licensed day trips in '14
- 10 operators – 3 of whom (Paddywagon, Galway Tour Company, Irish Day Tours/Extreme Ireland) carried 124,000 or 71% of these passengers

## Factors Behind This Growth

- Completion of M6 ('09) and M7 ('10)
- Strong SEO (Internet ranking) performance
- 6+ new 'Tourist' Offices in Dublin 1 and 2 = Ticket Offices for Bus Companies



## Issues Arising

- Congestion/concentration issues due to similar itineraries and growth esp. with 62 and 64-seaters now coming on route
- Route Licenses are key as local authority has a role in approving stop locations



# Environmental Impacts at Free Sites



- 15 sites identified as stopover points – all assessed initially. 6 heavily used (by buses) sites selected for detailed monitoring/evaluation = Alladie, Ballyalban Hill, Ballyreen, Murroughtoohy, Poul nabrone and An Rath
- Baseline habitat mapping, measurement of bus traffic and % of overall use, identification of site sensitivities, assessment, recommendations
- Ecological impacts at each of the stopping locations is assessed as “localised but slight and capable of recovery.” EirEco Consultants
- But there are concerns about access issues (private property), safety (road and cliff) and quality of tourism experience at these sites.

# Conclusions 1



## Bus business is growing – the good and the bad

- Economic Impacts – Lunch strong; Accommodation weak; Visitor Centre visits strong but distribution poor
- One bus per day for lunch throughout season in Inagh, Carron, Ballyvaughan etc would bring 9,028 people and sales of €123k
- Safety, Access and Capacity Issues need to be addressed – Alladie, COMVE, An Rath, Poul nabrone. Facilities at the Cliffs of Moher and Poul nabrone are close to capacity. Other visitor centres have considerable spare capacity
- There are growing traffic management issues at Doolin, Ballyvaughan and the Coast Road (R477) which, whilst not due solely to buses, is exacerbated by their presence, especially when in convoy
- Greater dispersal can benefit environment, businesses and quality of visitor experience. NTA route license conditions may be a key tool for management of Day Trip sector.

## Conclusions 2



- From a quality-of-experience perspective, particularly in a region whose reputation and brand is based on the quality of natural and cultural experience, heavy concentration of visitors brings potential for reputational damage.
- From 2011 -2014, bus passenger numbers increased by 53% at COMVE. Whilst some of this growth is a rebound from recessionary lows, the marketing impact of the Wild Atlantic Way and new Doolin facilities may offset this. Even a modest increase over 3 years will breach capacity at several Geopark locations but there needs to be consideration of the consequences of the continuation of the current trend which would lead to peak attendances of 200 buses daily/750,000 visitors annually at COMVE, 151,00 bus visitors at Poul nabrone and over 300,000 visitors at Alladie. Private land with no staffing, signage or facilities.
- **As bus numbers are on a consistent upward trend and as capacity at a number of locations is close to being breached, a do-nothing scenario is no longer justified.**

# Coach Tour business to the Cliffs of Moher Visitor Experience

- Total visitors 2015 – 1,251,574 = 15% growth on the previous year
- Of these Coach based (groups) make up 45.6% - 570,686 visitors – 16% growth
- Day tour groups now 17.4% 216,000+ visitors - 20% growth
  - 2007 – 30,000 visitors to Cliffs on day tour coach mainly from Galway
  - 2015 – 216,000+ visitors to Cliffs on day tour coach mainly from Dublin
  - 621% growth in past 9 years



# Capacity issues

- Peak months – May to Sept plus bank holidays
- Peak period 11am – 4pm
- Infrastructure constraints
- Quality of experience impact



# Capacity management measures

- Capacity management measures at the Cliffs
  - Infrastructure measures
  - Extended opening hours
  - Advance booking for all group business
  - Active management of coach onsite
  - Incentive pricing for off peak groups
  - Liaison with National Transport Authority on route licencing
  - Working with operators spread arrivals
  - No new licences available between 11am and 4pm



# Future developments

- Additional infrastructure developments
- Timed online bookings for FITs with off peak price incentives
- Systems integration for better intelligence and operational management



# Further research by BEN Con Ad Committee

## Coach Tourism in Doolin

- From 12:00hrs to 15:00hrs there can be up to 25 large coaches lunching in Doolin.
- Coaches are getting bigger. There are now at least six 64 seater coaches stopping in Doolin on a daily basis.
- There are 11 Public Licensed Day Tour Coaches licensed to stop in Doolin on a daily basis.
- In reality there are now up to 19 Public Licensed Day Tour Coaches stopping in Doolin on a daily basis in addition to a large number of private day tour coaches.
- There is only one Public Licensed Day Tour Coach with a licence to stop at Doolin Pier.
- In reality there are now up to 9 Public Licensed Day Tour Coaches stops at Doolin on a daily basis.
- Many of the Stop permissions granted to the coach companies are not fit for purpose.
- There are 7 Licences with stops in Doolin due for renewal from October to December this year.







## Economic Facts:

The potential for earnings in the area between the FIT sector and coach tourism sector is significantly different.

- On average one Coach Tour guest visiting the Geopark spends €12.08.  
(2014 Geopark study)
- Average overseas visitor spend in Co. Clare in 2014 was €228.16  
(2014 Failte Ireland Figures)
- Coach tourism supports 235 full-time equivalent jobs in the Geopark area. (2014 Geopark study)
- Overseas visitor spend in Clare supports 4352 full-time equivalent jobs  
(2014 Failte Ireland Figures)
- A 5% increase in Coach Tour guests visiting the Geopark would create 12 jobs
- A 5% increase in FIT visitors would create 217 jobs.

# August 2014



*August 2014:*

*Days Tour Coach parked on double yellow line waiting for passengers to load. Traffic tail back of 25+ vehicles waiting for coach to move on*

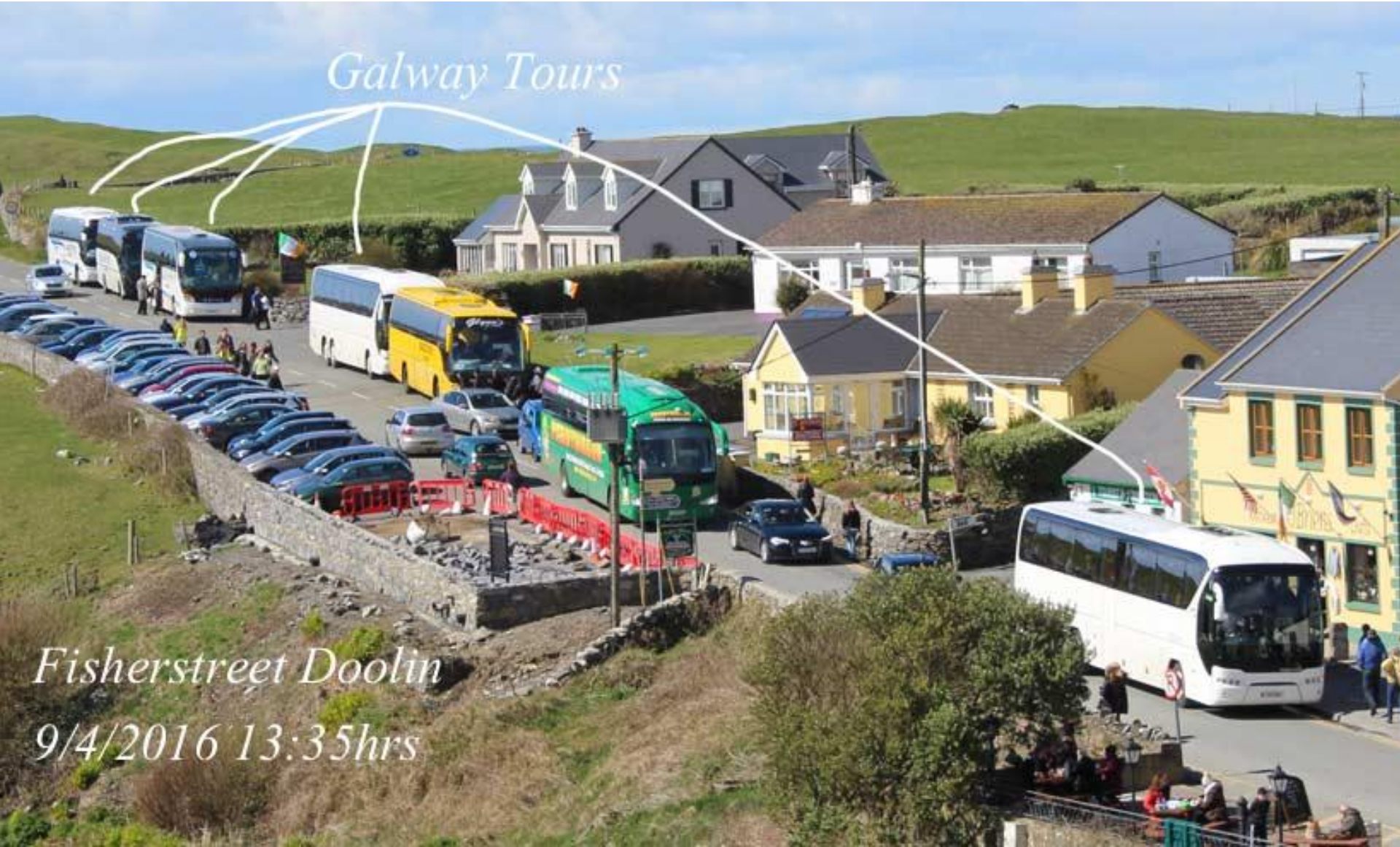
26 AUGUST 2014 13:58

# July 2015



# April 2016

*Galway Tours*



*Fisherstreet Doolin*

*9/4/2016 13:35hrs*

# Role of the National Transport Authority

- Timetabled itinerary open to members of the public and charge passengers on an individual basis must hold a licence issued by the NTA.
- Package tours that include an accommodation /private tours where a single hire fee is paid do not require licences
- The licence includes details of pick up, set down, interim stops.
- It is an offence to operate without a licence; not to comply with the conditions or to alter the provision of a service without first obtaining an amended licence.
- Licences are normally issued for a three year period unless a shorter period of operation is specified
- Each timetabled departure on a licence is valid for a single bus.
- Upon receipt of an application for a licence for a particular service the PTR (Public Transport Regulation) Division assesses the demand, considering the other licence holders and the range of timetables that exists.
- Following an **offer** of a licence further documentation is required before the actual licence is issued. These included:
- Approval from the relevant Road Authority or landowner (in the case of private property) for all of the proposed bus stops. **Stop Approval**
- Details of any subcontracting arrangements that will apply, insurance documentation, Commercial Vehicle Roadworthiness Test (CVRT) certificates for all vehicles, PSV licences for all vehicles and any fees due
- Licences that have already been issued are publicly available online on the NTA website.
- Also has responsibility for liaising with Bus Eireann on their services

- If a licence holder is not adhering to the conditions of the route licence the relevant authority or landowner can write to the NTA withdrawing permission to use the stop at any stage. It is not necessary to wait until the licence expires.
- The PTR work closely with the enforcement teams from the Road Safety Authority which is also part of the NTA.
- The relevant authority or landowner has the ability both to withdraw stop approvals where a licenced operator is causing a difficulty and to impose conditions.
- Some day tour operators operating considerably more services than their licences allow for.
- There are a number of operators routinely ignoring the timetable on their licence.
- There are a number of day tour operator licences which do not appear to include all of the interim stops they are routinely making.

# Role of Clare County Council

- Section 16 Road Traffic Act 2002 (1<sup>st</sup> Feb 2013)
- County Councils to issue or revoke permissions for stop approvals on the **public road**, including previously granted stop approvals
- Responsibility for stop approvals only in suitable places

# Further Data 2016

- **MAC Visitor Survey** (continue and improve Smart Open Data under EU project SDI4Apps, which is under the EU CIP ICT Programmes)
- **OPW Tool Kit test on Demo Sites**
- **National Park Traffic Survey**
- **Residents Survey**



# What Next?

- Baselines: 2014 visitor survey and Coach tourism survey findings on FIT and Coach Tourism?
  - Residents Survey?
  - Desired targets... Who decides these?
  - What actions by whom?
- S**(specific)**M**(measurable)**A**(achievable)**R**(relevant)**T**(time-bound) objectives and actions