

Buses in the Burren 2014



A Study of the Impacts and Issues

January 2015

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research & communications

Funded by

TRANS  TOURISM

 Northern
Periphery
Programme
2001-2013
Integrating research
to Europe's Northern
Periphery & Islands
and programme areas



Introduction

This study on bus and coach tourism has been commissioned by the Burren & Cliffs of Moher Geopark and has been funded jointly under TransTourism, the Northern Periphery Interreg IVB Programme and the EU LIFE + GeoparkLIFE Programme.

The Burren is one of Europe's most unique landscapes whose landscape and culture attracts increasing visitor numbers each year. The astonishing character of this karst region has evolved through a powerful combination of geology, ecology, archaeology, agriculture, history, heritage, commerce, creativity and community. These rich and diverse influences infuse the area with a haunting, spectacular and world-unique beauty.

Tourism is a valuable source of income for many businesses and families in the region. The quality of the tourism product and the care with which it is offered are crucial attractions for visitors. It's clear to all that tourism brings challenges as well as opportunities and that the unique natural assets of the region need to be protected and cared for.

To ensure the protection and sustainable use of this natural resource, a co-ordinated approach to visitor management and environmental protection has been underway for over a decade implementing the principle of ecotourism in the area and linking environmental, community and tourism interests with statutory agencies and business operators. These efforts have been accelerated since the award of UNESCO recognised Global Geopark status in 2011.

In order to plan more effectively for sustainable tourism practices in the area, the Burren & Cliffs of Moher Geopark have commissioned this study to establish baseline information on the extent and impacts of coach tourism in the area. It is part of a wider set of research projects activities on tourism and environment carried out in the area in 2014.¹

Such a study is unprecedented in the area and although buses and coaches are, by their nature, highly visible, until now there was little shared information as to their overall movement and impact. This study overcomes this by collecting robust empirical information gathered over the entire calendar year 2014. This includes interviews with and/or data from 40 organisations and businesses, 35 location counts (of people and traffic) and behaviour observations as well as 21 site assessments.

¹ Other studies conducted in 2014 include *Pilot Visitor Observation Studies of Environmental Impacts at the Burren & Cliffs of Moher Geopark (CAAS Ltd)*, *Ecological Study of Visitor Movement at GeoparkLIFE Demonstration Sites (EirEco)*, *Observation of Visitor Behaviour at GeoparkLIFE Demonstration Sites (Zena Hooctor)*, *Visitor Survey at GeoparkLIFE Demonstration Sites (Millward Brown)* and *Enterprise Survey of Burren Ecotourism Network (Burren & Cliffs of Moher GeoparkLIFE programme)*.

It therefore provides an authoritative baseline from which to undertake longitudinal studies and monitor ongoing activity as well as to discuss and decide tourism and traffic policy initiatives in the region.

The study has required deep co-operation from agencies, visitor centres operators, accommodation providers and bus companies (owners, managers, drivers and guides). The extent of the co-operation has been heartening and this will be a significant factor in planning even better outcomes for local people, visitors, businesses and the environment in this world-renowned location.

Contents

1. Key Findings	5
2. Aims, Methodological Note and Definitions	7
3. Irish Tourism Overview	12
4. Coach Tourism and Traffic: Numbers, Routes, Locations	14
5. Economic Impacts	26
6. Environmental Impacts	33
7. Discussion and Conclusions	43

Appendices

1. List of Consultations
2. Ongoing Actions for Longitudinal Study
3. Questionnaires and Surveys
4. Ecological Monitoring Report

Key Findings

- In 2014, there were an estimated 21,152 bus trips to and within the Burren carrying approximately 571,000 persons.
- Excluding retail sales, the estimated total revenue in the Geopark area from the bus sector is €6.9 million. This includes revenue of €2.5 million on lunches, €2.25 million on accommodation and €1.4 million in visitor entry fees.
- Bus tourism supports 235 full-time equivalent jobs in the Geopark area.
- The large majority of bus traffic enters the Geopark at either Ballyvaughan (N67) or Lahinch (R478). Lower volumes enter via Corofin/Lemenagh (R476 – R480) whilst levels are very low via Corofin/Ballyportry (R460). There are up to 3-5 buses per day in summer on the L1014 (Bellharbour/ Carran / Sheshymore).
- The environmental impact of buses stopping and passengers alighting at each of the sites is rated as “*localised but slight and capable of rapid recovery*”. However, current practices give rise to concerns about safety, access and the overall quality of the tourism experience.
- 47% of all visitors to Cliffs of Moher came by bus. This proportion has increased significantly from 39% in 2009 and is on an upward trend, reflective of the rise in bus tourism.
- 52% of the bus passengers travelled on Private Multi-day Tours (typically tours of Ireland lasting 5 – 13 days) and 12% arrived on Private Day Trips (typically educational groups, language schools, seniors groups, community organisations.) The remaining 36% or 175,361 persons, came as part of Public Licensed Day Trips, from Dublin and Galway (and to a much lesser extent from Limerick, Ennis and Cork). This sector is growing rapidly.
- Three companies carry 71% of these day trippers i.e. over 124,000 passengers. This is 26% of all bus passengers (multi-day tours and day trips).
- Whilst the Cliffs of Moher attracts approximately 86% of buses in the Burren each day, there were 2,957 bus visits carrying 78,121 passengers to next 10 largest private facilities.
- In 2014, there were over 20,000 stops at free sites in the landscape with over 600,000 passengers alighting.
- The most popular stop is at the coastal site of Alladie where approximately 6,500 buses with 180,000 passengers made a stop. Other major sites include Poulabrone (99,000), Ballyreen (60,000), Lahinch Prom (60,000) An Rath, Ballyalban (45,000) and Corcomroe Abbey (35,000).

- Total visitor numbers across the country are rising and bus tourism is rising as part of it. The Wild Atlantic Way has proven to be a strong brand and the industry is making strong use of it. We are likely to see a further rise in bus tourism focused on this route.
- From a capacity perspective, whilst no site's capacity for visitors or for parking is consistently breached at present, there is evidence that facilities at the Cliffs of Moher and Poul nabrone are close to capacity. The former is attempting to encourage buses to arrive at off-peak times whilst the latter's four bus spaces are often full in summer. This is the situation whilst many other visitor centres have considerable spare capacity.
- 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.
- As the numbers of buses are on a consistent upward trend and capacity at a number of locations is close to being breached, a do-nothing scenario is no longer justified. .

Aims, Methodological Note and Definitions

Aims

This study has three principal objectives:

- 1) to provide an authoritative baseline of bus/coach numbers and their activities in the Geopark area
- 2) to establish environmental and economic impacts of this activity and
- 3) to identify changing trends, if any, in this sector and assess their potential impacts.

Methodological Note

The study used a range of empirical and secondary research methods. It included interviews and questionnaires with approximately 40 industry managers and 300+ bus drivers, 35 locational counts, 21 site assessments, behaviour observations, film and video capture, examination of policy documents and analysis of data returns from visitor centres and accommodation providers.

The following describes the methods used in each of the study's three aims.

To Enumerate buses

Objective: to enumerate and account for bus/coach traffic travelling through the Burren and to acquire further information on routes, stopping points, points of origin/destination, accommodation venues and visitor behaviour

Method:

- Analyse Bus visitor data from visitor centres in the Burren
- Analyse Clare County Council Annual Traffic Count for 17/07/2014 and preceding years
- Enumerate all bus traffic and survey all driver/guides at Cliffs of Moher 17/07/2014 and 20/08/2014
- Enumerate all bus traffic and conduct visitor observation at six outdoor stopping locations on three separate occasions.
- Assess timetables and route information from tour/coach operators
- Collect route information and frequencies for licensed day trip operators
- Visit despatch points for tours in Dublin and Galway
- Collect supplementary information where necessary with Ennis and Burren accommodation providers
- Participate on selected bus trips
- Video capture

The information sources are 1) returns from the Cliffs of Moher Visitor Centre, other visitors centres and commercial premises, 2) Clare County Council Annual Traffic

Counts, 3) websites of tour operators, 4) interviews with tour operator owners, managers and drivers, 5) traffic counts, observations and interviews at multiple locations conducted during spring, summer and autumn 2014.

Assess Economic Impacts

Objective: to assess the economic benefits to the Geopark area from bus/coach business

Method:

- Survey driver/guides of tour operators, public day trip operators and private day trip operators for location of lunch, accommodation and other spending.
- Interview managers/owners at visitor facilities and retail outlets
- Collect information re. trade rates at various centres.
- Using survey data and data provided by visitor centres and accommodation centres, calculate overall worth of bus tourism
- Calculate bus passengers as proportion of all visitors at accommodation centres, visitor attractions and selected retail outlets.

Assess Environmental Impacts

Objective: to measure impacts of bus visitor activity at selected sites within the Geopark.

Method:

The main elements of the ecological monitoring methodology are contained in the report on Ecological Monitoring prepared by EirEco Environmental Consultants – see Appendix 3. This includes information on site selection as well as monitoring. In addition, the assessment of ecological impacts was also informed by the following preliminary actions:

- Calculate visitor numbers at six free sites by on-site enumeration
- Conduct visitor observation at six free sites in Burren on three occasions each
- Interview drivers/guides and company owners to get details on stopping points, passenger briefings and guidelines.
- Participate on selected bus trips
- Video capture.

Defining the Sector

Coach and Bus Types and Sizes

This study is concerned with all bus and coach traffic. Fáilte Ireland's ongoing series of sectoral studies on coach tourism divides buses and coaches into three categories viz. Coach (vehicle of greater than 9 metres length and 40 seats), Midi-coach (7 – 9 metres with 16 – 39 seats) and Minibus (5 – 7 metres and 8 – 15 seats).

In line with this definition, the study includes all bus and coach traffic i.e. those with 8 or more seats that are larger than People Carriers.



✓These three sizes are included.



✗ Not Included in the Study.

Types of Coach/Bus Tours and Trips

Coach traffic through the Burren can be considered under the following categories:

- Multi-Day Tours

52% of bus visitors to the Cliffs of Moher are on such tours ranging in duration from three to fourteen days, usually originating in Dublin. They include full tours of Ireland and shorter ones to regions such as Kerry, Connemara etc. There is a strong focus on flagship locations such as Ring of Kerry, Bunratty, Cliffs of Moher, Blarney, Kylemore Abbey, Giants Causeway. Most tours are five to eight days in duration with a high passenger profile in the over 55 years category. These are increasingly being focussed on and marketed as Wild Atlantic Way tours. It is important to note that there is a great deal of variety in the economic impact of tours. Some may purchase lunch, stay overnight and give time for shopping whereas others may alight only at the Cliffs of Moher and may even offer catering on board (see pictures below). This is outlined further in the section on Economic Impacts.



Regular Multi-Day Tour Buses at the Cliffs of Moher



Self-Catering Tour Buses at the Cliffs of Moher

- Licensed (Public Route) Cliffs of Moher Day Trips

These are single day tours originating mainly in Dublin and Galway (with a small number of routes ex Limerick and Cork), all featuring a stop at the Cliffs of Moher Visitor Experience and some picture stops and brief walking/sightseeing

opportunities in the landscape within the Geopark area and/or Bunnratty. They are sold directly to the public and hence need a route licence from the National Transport Authority. They account for 36% of bus visitors to the Cliffs of Moher.



Day Trip Buses Parked for Lunch at Roadford, Doolin

- Private Day Tours

Examples include primary and secondary school trips, urban language schools, active retirement groups and specialist interest groups. These account for 12% of bus visitors to the Cliffs of Moher.

- Other

Outside of the three large categories above, there are a number of other types of bus and coach visits including

1. Specialist Tours – Examples include Burren Art College students, Burren Outdoor Education Centre groups, specialist outdoor activity and Burren Study groups.
2. Local bus traffic including teams going to sporting fixtures, Bus Éireann scheduled services including daily services to the Cliffs of Moher.

Almost all multi-day tours, bar a very small number of specialist activity groups, include a stop at the Cliffs of Moher Visitor Experience. All licensed day trip include the Cliffs of Moher as it is included in the route license schedule. Most private day trips also include it.

Irish Tourism Overview

After the Celtic Tiger years and subsequent recession, Irish tourism numbers have been on a significant increase since 2010. Overseas and Northern Irish tourist numbers grew to 7.05 million for the first 11 months of 2014, an increase of 8.6% over the same period in the previous year.²

In 2013, overseas visitors spent an estimated €4.5 billion and expenditure by Irish residents taking domestic trips and vacations brought total tourism expenditure to €5.9 billion.³

Visitor numbers are now back to 2006 levels (7.4 million out-of-state tourists for full calendar year in 2006⁴) and they represent a substantial increase on figures from 2010, such that that year can now be confidently called a trough as the trend henceforth is upward.

In 2013, the Shannon Region received a total of 1.64 million visitors (931,000 million overseas tourists, 42,000 visitors from Northern Ireland and 669,000 domestic trips, bringing total revenues of €363 million, (€250 m overseas, €5.5m NI, €108m domestic, rounded).⁵

Early research and industry feedback suggests that the overall annual increase of 6% growth achieved nationally in 2013 will be surpassed both regionally and nationally in 2014. In the period April – June 2014, the total number of *trips to Ireland* increased by 12.3% to 2,126,600 - an overall increase of 233,600 compared to the same period twelve months earlier. Total overseas visits for the first six months of the year were 3.47 million, a growth of 10.3 % overall.⁶

The CSO's official count of direct employment in the 'accommodation and food service sector' was 137,700 in 2012 whilst the Fáilte Ireland surveys of tourism and hospitality businesses (which includes some tourism services and attractions not included by CSO) estimates the total employment figure at 200,000.⁷

Within the overall tourism sector, coach holidays and day trips are viewed as playing a significant role, including by Fáilte Ireland, for a number of reasons e.g. it achieves a large regional distribution; 82% of coach tourists in Ireland use hotels and help sustain the hotel stock; the relatively high seasonal spread of coach tourism helps sustain tourism infrastructure and visitor attractions as well as hotels; the sector suits older tourists who may not visit by alternative means.⁸

There were 294,000 overseas coach tourists to Ireland in 2013, contributing an estimated €210 million to the economy. The top market is North America (approx.

² Fáilte Ireland, 2014, *Overseas Visitors to Ireland, January to November 2014*

³ Fáilte Ireland, 2014, *Tourism Facts 2013*

⁴ Fáilte Ireland, 2007, *Tourism Facts 2006*

⁵ Fáilte Ireland, 2014, *Tourism Facts 2013*

⁶ Central Statistics Office, 28/7/2014 *Statistical Release, Overseas Travel April – June 2014*

⁷ Fáilte Ireland, 2014, *Tourism Facts 2013*

⁸ Fáilte Ireland, *Coach Tourism: A Sectoral Study, May 2012*

45% of all coach visitors) but the British market and long haul destinations are on an upward trend, the former after a very steep decline between 2008 and 2012.⁹

Coach tourists stay an average of 7.6 nights in Ireland (8.2 for North American visitors). This length-of-stay figure has decreased from 8.1 nights in 2010.

Hotels account for 82% of the accommodation used, 8% B+B/Guesthouses and 4% hostels.

Whilst 34% of the tour business is in July and August, 19% arrive October – March. The percentage arriving in winter has increased from 14% to 19% in the period 2010 – 2013.

52% of coach visitors are over 55 years. This is down from 56% in 2010. Significantly, 53% are in social class C1 (Supervisory, clerical, junior managerial, administrative or professional), down from 60% in 2010.¹⁰

Fáilte Ireland survey returns indicate that there are about 1,300 coaches in the national fleet but many of these are dedicated to school transport and other non-tourism use. Based on CSO data on registrations and their own coach approvals system, Fáilte Ireland is now estimating a fleet of 620 buses (70% standard size, 18% midi and 12% minibuses).¹¹

Fáilte Ireland have concluded that between 2006 and 2010, average daily hire-out rates (€400) did not cover costs once fixed costs are factored in and hence the sector was running at a loss and there were indications of below cost pricing as well as considerable spare capacity.¹² Whilst the sector is benefitting from the general upturn in tourism activity, some drivers and owners have reported rates similar and even below €400 per day during the course of this study.

Whilst the figures above relate to the multi-day, residential sector, when considering coach tourism, it is increasingly important to distinguish between multi-day, residential business and the day-tour sector. Most of the former are amongst the 66 members of the Coach Tourism and Transport Council of Ireland (CTTC) whilst most of the larger day-trip operators are not.

As will be seen later, the day-tour business (principally ex-Dublin) has grown with the development of the national motorway network. A drop in rent for street-level retail space in the tourist streets in Dublin had led to the creation of at least six 'tourist information' offices operated as sales points by day-tour companies.

It is worth noting that there is an emerging trend of tour operators from mainland Europe travelling on their own coach (from point of origin *and* within Ireland). Within this group, there is a smaller number who offer lunch and catering options from on-board facilities.

⁹ *Fáilte Ireland, Coach Tourism 2013 November 2014*

¹⁰ *ibid, p.6*

¹¹ *Fáilte Ireland, Coach Tourism: A Sectoral Study, May 2012, p.7*

¹² *ibid, p19*

Coach Tourism: Numbers, Routes, Locations

Total Numbers

In 2014, there were 21,152 bus trips to and within the Burren carrying approximately 571,000 persons.

This figure is derived from the actual 17,980 buses and 485,963 passengers recorded at the Cliffs of Moher and a working estimate, based on successive Clare County Council Annual Traffic Census returns, that between 85% and 90% of all buses in the Burren visit the Cliffs.¹³

Table 1 Bus and Passenger Daily Averages in the Burren, 2014

2014	Total Buses in Burren/Pax¹⁴ on Board	Total Buses at COM/Pax on Board
Average Day	60/1609	51/1368 ¹⁵
Average Peak Season Day	115/3180	94/2600
Busiest Day	145/3900	129/3371

Where Do They Go?

Fee- Paying Sites and Visitor Centres:

- **17,980** bus visits carried **485,963** passengers to the Cliffs of Moher in 2014.
- **2,957** bus visits carrying **78,121** passengers to next 10 largest sites.¹⁶

¹³ This estimate is based on a comparison of data from COM over past 4 years with CCC's annual Road Traffic Census which measures all traffic in the vicinity.

¹⁴ Number of people on board

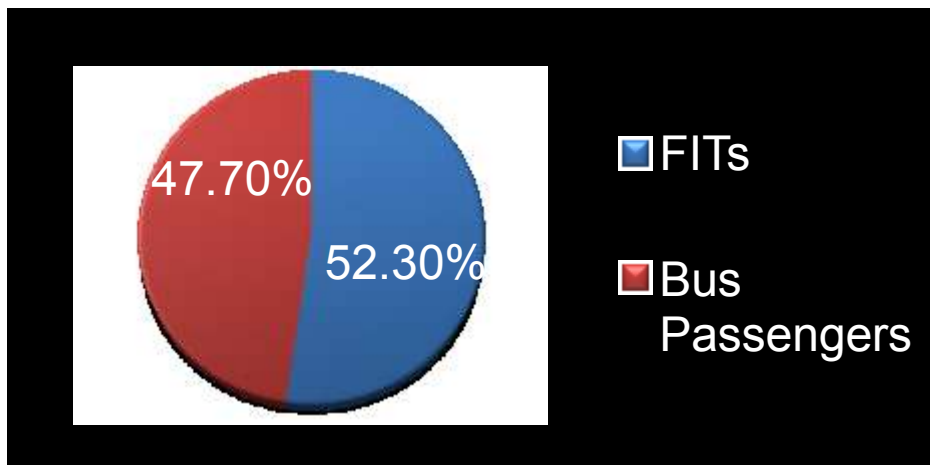
¹⁵ Based on 355 days of operations in 2014. The Centre closed for three days at Christmas and seven day for weather events.

¹⁶ Based on a combination of returns from visitor centres and bus route data

Cliff of Moher Visitor Experience

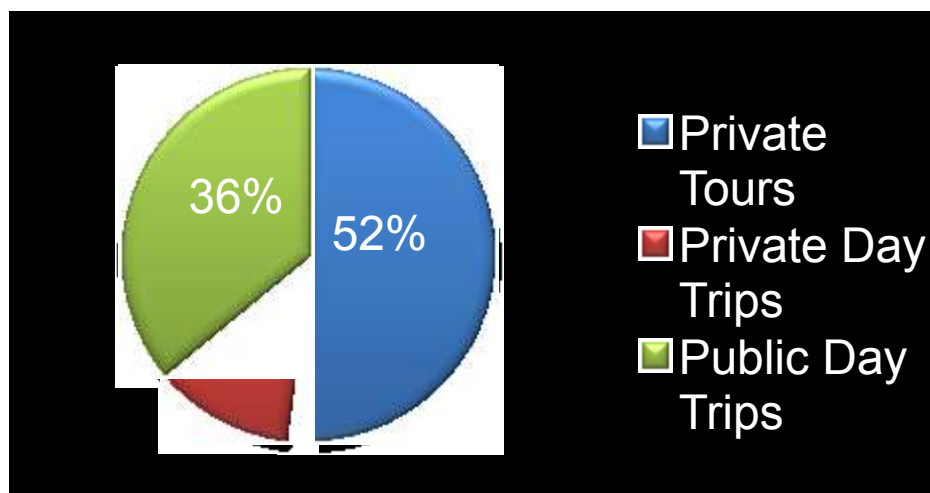
The Cliffs of Moher Visitor Experience received 1,024,055 visitors in 2014. Bus passengers now make up 47% of all visitors. The ratio of bus visitors to FITs (Fully Independent Travellers) has been consistently growing in recent years and is up from 40.1% in 2011 and 34.5% in 2009.

Proportion of Bus Passengers and Fully Independent Travellers at Cliffs of Moher 2014



52% of bus passengers travel on Private Multi-day Tours (typically tours of Ireland lasting 5 – 13 days). 36% travel as part of Public Licensed Day Trips whilst 12% are on Private Day Trips (typically educational groups, language schools, seniors groups, community organisations.) Developments and trends in these sectors are outlined later.

Proportion of Private Day Trips, Multi-Day Tours and Public Day Trips to Cliffs of Moher, 2014

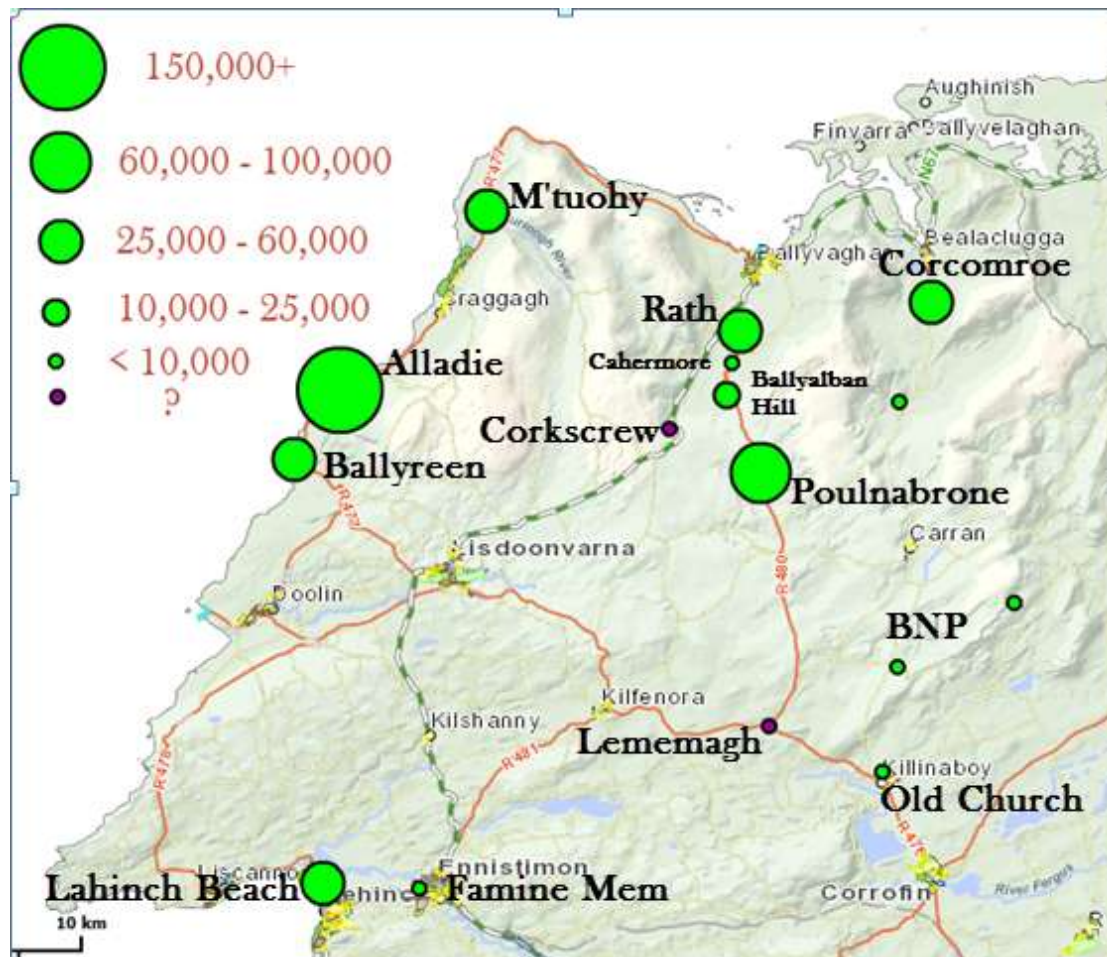


The Cliffs of Moher Visitor Experience received 86% of all visits to Visitor Centres in the Geopark in 2014.

Non Fee- Paying – Free sites in the Landscape

Buses stopped at free sites in the landscape on over 20,000 occasions in 2014, allowing over 600,000 passengers to alight.¹⁹

Map 2: Bus Passenger Visits to Non-Fee Paying Sites, 2014



Alladie - 180,000²⁰ Poul nabrone 99,000²¹ Ballyreen 60,000 An Rath 45,000²² Lahinch 60,000
 Murroughtoohy 25,000 Corcomroe 35,000²³ Ballyalban Hill 18,000 Cahermore 5,000²⁴

Approximately 6,500 buses with 180,000 passengers stop at the coastal site at Alladie. This comprises an enumerated 5,500 buses/164,164 passengers on licensed public day trips and approximately 220 buses/8,000 passengers on other

¹⁹ The figures derive from bus company route information, driver surveys, traffic counts and Cliffs of Moher visitor figures. In the case of sites used by Day Trips, actual figures, not estimates, are provided as stopping points are part of the public route licence and there is no deviation from route or stop except in case of emergency.

²⁰ Scheduled stop for Day Trips by six operators

²¹ Scheduled stop for Day Trips by three operators

²² Scheduled stop for largest Day Trip operator

²³ Scheduled stop for one large Day Trip operator

²⁴ Used as overflow stop to prevent congestion at An Rath

excursions mainly by the same operators. Three companies account for approximately 130,000 of the total passengers stopping at Alladie.

Other major sites include Poul nabrone (99,000), Ballyreen (60,000), Lahinch Prom (60,000) An Rath, Ballyalban (45,000), Corcomroe Abbey (35,000), Murrough toohy (25,000), Ballyalban Hill (18,000), Cahermore (5,000).

Lesser visited sites include the Burren National Park (Gortlecka and others), Abbey Hill, Old Church Kilnaboy, Lemenagh, Ennistymon Famine Memorial, Corkscrew Hill.

At the Burren National Park, there is a seasonal, ongoing Park 'n' Ride Bus Service. Other regular educational bus visits have ceased but one tour operator has plans to bring walking tours there by bus in 2015.

Bus Routes Entering, Exiting and In the Geopark, 2014

The large majority of bus traffic enters the Geopark at either Ballyvaughan (N67) or Lahinch (R478). On the day of the Clare County Council Road Traffic Census (17/07/2014), 114 buses passed through Ballyvaughan and 97 passed Lahinch Golf Club (combined figures for both directions). A slightly smaller number passed through Ennistymon (some bypass it whilst other go to/from Shannon ferry via Lahinch and Miltown). Lower volumes enter via Corofin/Lemenagh (R476 – R480) whilst levels are very low via Corofin/Ballyportry (R460). There are up to 3-5 buses per day in summer on the L1014 (Bell Harbour/Sheshymore).²⁵

The prevailing traffic direction is clockwise using the R477 (Coast Road) and R480 (Ballyvaughan – Lemenagh). Whilst there is little deviation from main routes by buses, almost all licensed day trips take lunch in Doolin and travel there via the R479 (Doolin - Ballinacken Castle).

The following maps show the access routes and direction of travel on the 17/07/2014 and have been produced by undertaking a driver/guide survey at the Cliffs of Moher on 17/07/2014 and combining it with data from the Clare County Council Road Traffic Census of the same day. 76 buses visited the Cliffs of Moher on that day, of which 17 were Public Day Trips and 59 were Private Tours. Itineraries were recorded for 68 of these. **45 travelled in a clockwise direction and 23 anti-clockwise.**

²⁵ *The Clare County Council Traffic Census does not include the L1014 which facilitates access to the Burren Outdoor Education Centre and the Connolly Farm Walks Facility.*

Map 3 Clockwise Loop: 19 Buses (5 Public Day Trips, 14 Private Tours)



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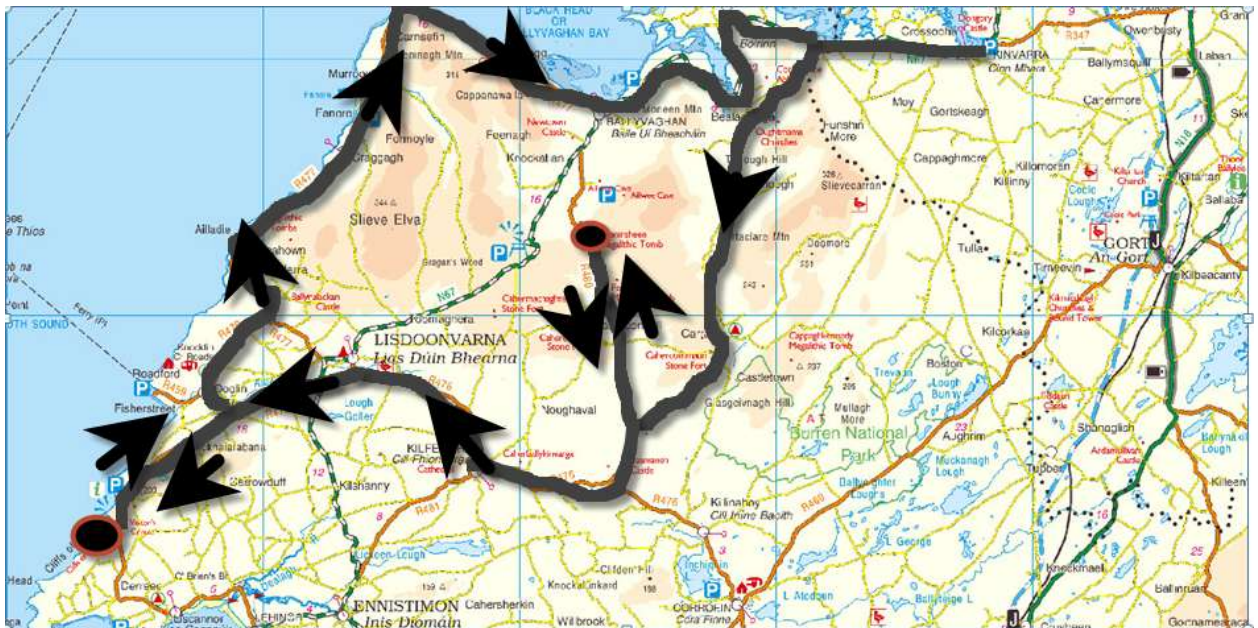
Map 4 Clockwise Onward: 19 Buses (5 Public Day Trips, 14 Private Tours)



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Map 5 Clockwise Variants: 7 Buses (1 Public Day Trip, 6 Private Tours)

The following map shows an example of a variant of the clockwise routing.



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Map 6 Anti-Clockwise Loop : 18 Buses (1* Public Day Trip 16 Private Tours)



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*note one of these day trips is Paddywagon who take a detour via Corcomroe Abbey. This can be up to 3-4 buses daily in peak season.

Map 7 Anti-Clockwise Onward: 4 Buses (2 Public Day Trip 2 Private Tours)



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Map 8 Anti-Clockwise Variant: 1 Bus (1 Public Day Trip)



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Map 9 Bus Traffic on N67 via Corkscrew Hill

There were 21 buses on the N67 via Corkscrew Hill on 17/07/2014. Few of these accessed the Cliffs of Moher on that day. Traffic here mainly comprises 1) those who are on their way to or from an overnight in Lisdoonvarna. They have either visited Cliffs of Moher on the previous day or will do so the next day and 2) those not visiting the Cliffs of Moher .e.g. Burren Art College students, Burren Outdoor Centre students, local bus companies, minibus and care centre buses.



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Types of Bus Visits – Day Trip and Tours, Public and Private

As outlined above, the 17,980 buses and 485,963 passengers at the Cliffs of Moher in 2014 can be broken down as follows:

Multi-Day Tours: Approximately 252,000 visitors or 52% of total

Licensed (public) Day Trips: 175,361 visitors or 36% of total

Private Day Trips: Approximately 58,000 or 12% of total

Multi-Day Tours usually are of three to fourteen days duration, mostly originating in Dublin. They include full tours of Ireland and shorter ones to regions such as Kerry, Connemara etc. There is a strong focus on flagship locations such as Ring of Kerry, Bunratty, Cliffs of Moher, Blarney, Kylemore Abbey, Giants Causeway. Most tours are five to eight days in duration with a high passenger profile in the over 55 years category. These are increasingly being focussed on and marketed as Wild Atlantic Way tours.

Private Day Tours are chartered buses with private groups such as primary and secondary school classes, urban language schools, active retirement groups and specialist interest groups.

In the miscellaneous or 'other' category, we can include Specialist Tours such as Burren Art College students, Burren Outdoor Education Centre groups, specialist outdoor activity and Burren Study groups as well as local bus traffic including teams going to sporting fixtures, Bus Éireann scheduled services including daily services to the Cliffs of Moher.

Whilst all categories of bus trips are growing, the growth of the licenced day trip to the Cliffs of Moher is a relatively new phenomenon and is growing rapidly both in absolute terms and as a proportion of overall bus traffic in the Burren. These trips originate mainly in Dublin and Galway (with a small number of routes ex Limerick and Cork), all featuring a stop at the Cliffs of Moher Visitor Experience and some picture stops and brief walking/sightseeing opportunities in the landscape within the Geopark area and/or Bunratty. They are sold directly to the public and hence need a route licence from the National Transport Authority.

Currently, there are 13 licence holders permitted to operate day tours to the Cliffs of Moher from Dublin, Galway, Limerick and Cork. Of the 13 operators currently holding licenses for routes to and from the Cliffs of Moher, most are active year round on a daily basis. In 2014, they carried approximately 175,361 visitors to the Cliffs of Moher, accounting for 36% of coach visitors. The top 3 operators on the route have carried 124,164 or 71% of these.

The growth in this sector has been driven by several factors:

- The completion of the M4 motorway in December 2009 and the M7 in 2010, and the shortening of driving time has made it possible for drivers (who

normally act as guide also) to comply with rest regulations and this has improved the commercially attractiveness and viability of day trips. This has been accentuated by the purchase of new supersize buses with 62 and 64 seat capacity.

- Lower office rents in Dublin city centre and tourist areas has facilitated operators to set up high profile 'Tourist Offices' to sell tickets directly to the public. The larger operators operate these offices in Dame Street, Grafton Street, O'Connell Street and Bachelors Walk in Dublin and adjacent to the Bus Station in Galway. Trips to the Cliffs of Moher feature strongly on outside branding, overhead signage, window displays/films. At least six new high profile outlets have opened in Dublin City Centre in the past four years.



Dublin and Galway Sales Offices of Bus Companies Offering Day Trips to Cliffs of Moher

- Strong internet presence is increasing the online visibility of day trips and allowing for direct ticket sales. The main operators have developed strong Search Engine Optimisation performance and their services dominate Google rankings for all searches relating to the Cliffs of Moher. There is considerable competition on these day trip routes via online activity, at dedicated sales/tourist offices, at accommodation providers and in bus stations. One large provider also operates hostels in Dublin and Kerry where its tours are heavily promoted.

Typically, the itinerary of larger operators only includes one stop with an entry fee (the Cliffs of Moher Visitor Experience) although some small operators also include a choice of Aillwee Cave and/or Wild Burren Walks. Operators use a variety of stops in the landscape for photograph opportunities, short walks and sightseeing. Almost all day trips include a longer stop (20 minutes to one hour, depending on weather) at Alladie. Other common stops on day trips include Dunguaire Castle (just outside the Geopark area), Corcomroe Abbey, An Rath Fort at Ballyalban, Poulinabrone, Lemenagh Castle (photo opportunity without entering private property), and Black Head.



Typical scene at Alladie during Cliffs of Moher Day Trip

The Dublin buses set out between 0650 hours and 0730 hours via either the M6 (Galway) or M7 (Limerick). They arrive at the edge of the Geopark area around 1030 hours and leave the area around 1500 hours. They have lunch in Doolin and visit the Cliffs of Moher on either side of lunch in order to reduce congestion at the Cliffs or at lunch stops.

Galway tours leave the central bus station at 1000 hours (one operator has a half-day tour commencing at 1300 hours). The itineraries thereafter are similar to the Dublin routes although they stay in the Geopark area until 1700 approx. Similarly, the Cork and Limerick routes are timed to be in the Geopark area from approximately 1030 hours, allowing a return to point of origin at 1800 – 1900 hours.

Other statistics from this sector worth considering are:

- In the peak months of July and August 2014, day trips accounted for 45,000 visitors and 1,300 buses. This averages 21 buses a day, with over 95% stopping at Alladie commonage area.
- There is a good seasonal spread of these trips as the March figure for the top 9 operators (15,011) is 63% of the August figure (23,742). Whilst they account for 30% of buses in August, the figure is over 50% in March.

Economic Impacts

The economic value of bus tourism to the area is considered in this section.

Firstly, it is worth considering the cost to the consumer. Day trips cost €38 - €45 ex Dublin and €20 - €25 ex Galway whilst it is not possible to isolate the Burren element of multi-day tours or itemise their Burren components separately.

In respect of where the spending power of the consumer is located, we can summarise the Burren and non-Burren elements as follows:

Procured or Spent Outside Geopark:

Most items procured by the tour operator are bought outside of the Geopark e.g. fuel, road tax and insurance, vehicle purchase and maintenance, Driver and Guide wages and Environmental Support Donations²⁶. Tour companies usually directly book and pay visitor centre fees.

Overnight accommodation for 82% of passengers on multi-day tours is booked outside the Geopark although many of the 18% who stay do so for more than one night.

Procured or Spent Within Geopark:

A small number of local guides are engaged by tour companies.

Passenger spending include the lunches for all day-trip buses, other lunches, some visitor centre entry fees, refreshments, gift shopping particularly at the Shannon Heritage-operated outlet at the Cliffs of Moher Visitor Centre and Doolin where all day trips allow free time at lunch time. To a lesser extent, there are retail opportunities for bus passengers at Ballyvaughan and at visitor centre outlets.

Information from the Shannon Heritage outlet is not available although there is further discussion of retail performance below. In summary, therefore, spending within the Geopark by tour companies and their passengers is accounted for under the following headings:

- Lunch Trade
- Accommodation
- Visitor Centre Entry Fees
- Refreshments and Entertainment.

²⁶ One day-trip company encouraging passengers to donate to environmental causes but this money is forwarded to an environmental charity outside the host environment.

Lunch Trade

All licensed day trips make a lunch stop within the Geopark/Liscannor/Lahinch area and sampling over three days of the year shows that 52% of all other buses do so.

Over 90% of licensed day trips make their lunch stop in Doolin, with purchase rates of approximately 60%. The lunch trade in Doolin has been very responsive to the bus operators, especially day trip operators. The latter are organising their itineraries in order to avoid each other and hence reduce congestion at both the Cliffs and Doolin. Approximately **113,217** lunches derive from this sector.

Of the private tours, 161,200 passengers are offered the opportunity to take lunch within the Geopark/Liscannor/Lahinch area and with a variety of take-up rates, approximately 87,720 lunches accrue.

Therefore, the total number of lunches taken by bus passengers in 2014 was **200,531**, yielding revenue of **€2,506,637**.

Although licensed day trips make up 36% of all buses, they purchase 56% of all lunches in the Geopark area.

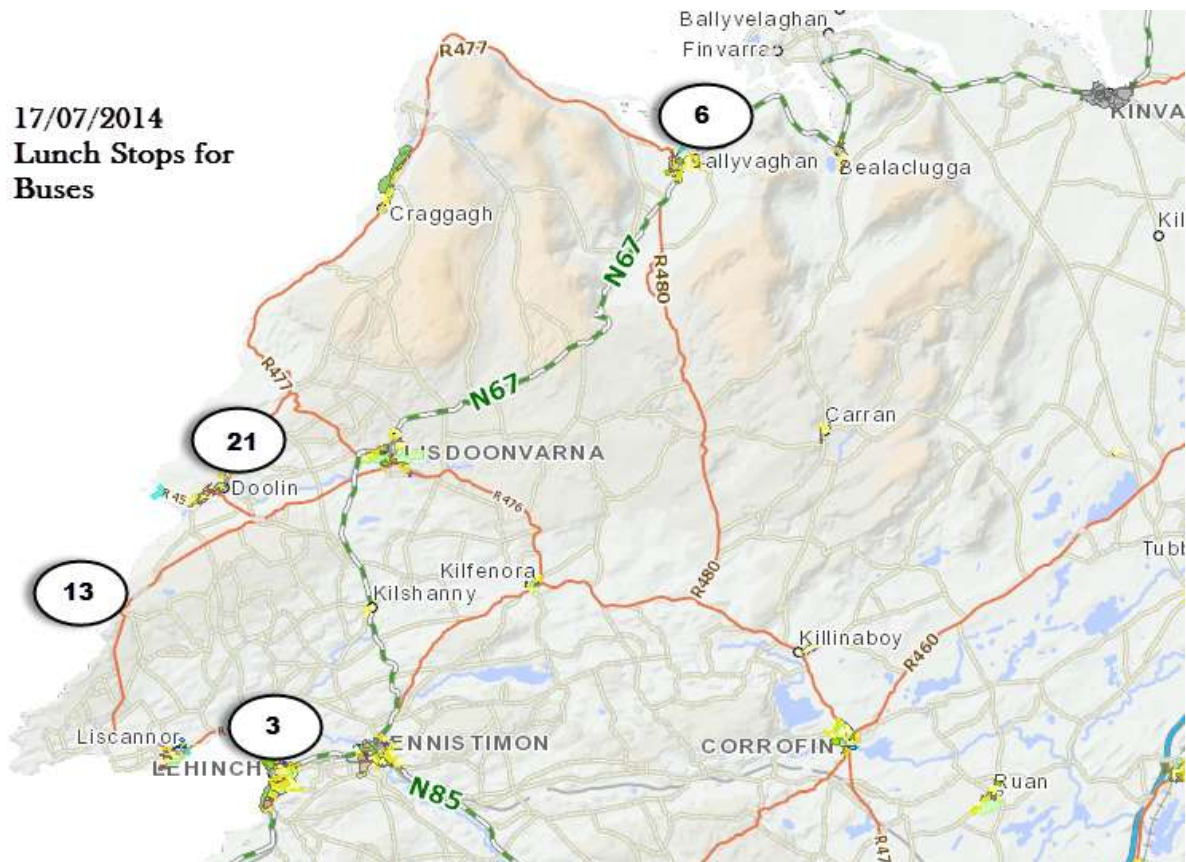


Lunch Time – Roadford, Doolin, Summer 2014

Sample Day - Case Study

All buses were surveyed on two separate days and were asked where was their lunch stop for the day. On 17/07/2014, 43 buses out of 76 stopped for lunch within the Geopark/Liscannor/Lahinch area. All bar one of the Public Day Trips took their lunch in Doolin as is the practice each day. Of the Private Tours, thirteen ate at the Cliffs of Moher, whilst others went to Doolin, Ballyvaughan and Lahinch.

Map 10 Number of Buses Stopping for Lunch



Accommodation

In 2014, 252,000 visitors passed through the area as part of multi-day tours. Most travelled in and out of the Geopark on the same day and did not stay overnight.

Returns from the area's hotels show that **66,446** bed nights were filled in the Geopark/Liscannor/Lahinch area by multi-day tour buses.²⁷ Receipts from bus passengers (taking into account those who stayed on B+B basis only and those on Dinner/B+B basis) is estimated at **€2,249,900**. This does not take into account further spending on bar, entertainment or refreshments in hotels.

For every 100 visits to the Cliff of Moher by passengers on multi-day tour buses, 26 bed nights are yielded. Bearing in mind that some passengers, especially those who as part of Trend Tours in Lisdoonvarna, stay for more than one night, the percentage of visitors staying in the area is considerably less than 26%. When those staying two nights or more are factored in, the proportion of multi-day tour passengers who stay in the area is 18%.

Within these figures, there is a considerable reliance on one hotel/tour company who accounts for 69% of bed nights in the area.

Given the low level of hotel accommodation in the Geopark area, it is worth outlining the yield elsewhere in the county. An estimate is derived from surveys of tour companies and data from hotels – this demonstrates that tour buses visiting the Cliffs of Moher Visitor Experience accounted for **55,440** bed nights in other parts of Clare (mainly Ennis, Dromoland and Bunratty). When trade rates for different sectors are applied, total income from Dinner, Bed and Breakfast is estimated at **€2,910,600**.

Therefore, the total return for County Clare in 2014 was **121,886** bed nights and income of €5,160,560 in Dinner and Bed and Breakfast income from buses visiting the County.

Table 2 Bed Nights and Income From Tour Buses, 2014

	Geopark/Lahinch/Liscannor	Rest of Clare	Total Clare
Bed nights	66,446	55,440	121,886
Estimated Income	€2,249,900	€2,910,600	€5,160,560

Tours average eight days but the recent trend has been toward shorter itineraries with some companies cutting their tours of Ireland from seven to five days. This reduces the possibility of getting groups to stay longer and as the proportion of tour bus visitors staying in the Geopark area (18%) and the rest of Clare is low, additional revenue is more likely to come from attracting more bus visitors to stay rather than increasing the length of stay of existing visitors.

²⁷ *Bed nights at the Burren Outdoor Education Centre are not included here as the groups involved pay a total package price for skills instruction combined with dormitory style accommodation.*

Visitor Centre Entry Fees

In 2014, there were **17,980** bus visits carrying **485,963** passengers to the Cliffs of Moher Visitor Experience.

2,957 buses carrying **78,121** passengers visited the next 10 largest Visitor Centres—the largest being Aillwee Cave and Burren Centre, Kilfenora.

There is a variety of trade rates at these premises and some do not charge an entry fee, relying instead on sales.

Applying trade rates across different sectors, total entry fees at all Visitor Centre 2014 are estimated at **€1,428,1014**.



Bus Passengers Alighting at Cliffs of Moher Visitor Experience Drop-off Point

The Cliffs of Moher Visitor Experience attracts 86% of all bus visitors who attend a commercial or fee-paying visitor facility in the Geopark. The site itself not only has a global reputation and this has been reinforced in recent years by a number of significant factors e.g. 1) the presence of a new visitor facility with dedicated marketing staff, 2) the inclusion of the site in the name of the new Geopark entity and 3) the creation of the Wild Atlantic Way which is marketed globally and on which it is one of the iconic locations .

The Cliffs play a large role in attracting bus visitors into the area and many local attractions gain business as a result but there are now capacity issues at the Cliffs whilst many other visitor centres have considerable spare capacity.

Refreshments and Entertainment

Spending on these items is difficult to assess or even estimate but it is possible to apply some broad approaches.

Fáilte Ireland estimates that overseas coach tourists spend 22% of their in-Ireland expenditure on Food and Drink²⁸ but they do not apportion out the non-meal element of this. We can however derive an estimate based on a proportion of those not purchasing a lunch meal. We know that 485,963 bus passengers visited and, given the nature of their itineraries, approximately 350,000 were in the Geopark area at lunchtime but only 200,000 purchased a lunch meal. If 75% of the remainder purchased a drink and snack for €4, this would yield **€450,000**.

Fáilte Ireland estimates that overseas coach tourists spend 6% of their in-Ireland expenditure on Entertainment²⁹ but, as most of this spending takes place in the evening and no surveyed operator allows time for same except for overnighting itineraries, this would apply to the 66,446 bed nights. Applying 6% of the average €600 spend (divided by eight – the average length of tour in days) would give an estimated spend of **€299,007**.

Shopping and Retail Income

Spending on retail environments is difficult to ascertain for reasons of commercial confidentiality and difficulties of drawing firm conclusions from sampling or surveying, given the variety of outlets.

It is useful to outline the retail opportunities available to bus visitors:

- 485,963 bus visitors in 2014 had an opportunity to avail of retail opportunities at the Cliffs of Moher.
- 175,361 Day Trip visitors had an opportunity to avail of retail opportunities in Doolin.
- Approximately 27,000 bus visitors had retail opportunities in Lisdoonvarna
- Approximately 18,000 bus visitors had retail opportunities in Kilfenora.
- A small number of facilities attract bus visitors to view and buy products e.g. Burren Smokehouse and The Rock Shop, Liscannor.
- Sampling over three days shows that 52% of bus visitors got no opportunity to visit a retail premises within the Geopark/Liscannor/Lahinch area other than the Cliffs of Moher shop operated by Shannon Heritage.
- Outside the Geopark area, surveys show that 22% or 106,912 persons, had retail opportunities in Bunratty and a further 45,705 persons in Ennis. Many groups overnighting in Ennis also visit Bunratty for the Medieval Banquet.

As all bus visitors have an opportunity to shop at the retail outlet at the Cliffs of Moher Visitor Experience and much lesser numbers elsewhere, given the non-availability of information from the Cliffs of Moher shop, operated by Shannon Heritage, it is not possible to establish overall retail income or patterns.

²⁸ *Fáilte Ireland, 2013 Overseas Coach Tourists – Breakdown of Expenditure While in Ireland*
²⁹ *idem*

Other retail operators have estimated bus passengers as providing between 16% and 40% of income and shops in Doolin especially have reported the positive effect of the rise in day trip tourism over the three years.

Fáilte Ireland estimates that overseas coach tourists spend 31% of their in-Ireland expenditure on shopping³⁰ but an average of this could not be relied upon given the level of gift shopping opportunities and the time allocated in other locations such as Galway, Killarney, Dublin etc.

Therefore, whilst it is clear that there is a strong positive economic impact from retail income, robust estimates cannot be drawn.

Total Spending and Employment

Excluding retail, the estimated spending by coach operators and their passengers in the Geopark in 2014 was **€6,933,558**.

Using Fáilte Ireland's guideline that each €1million of tourist expenditure helps to support 34 tourism jobs³¹, this indicates that **235 jobs** are supported by bus tourism in the Geopark area.

This is in addition to spending in Ennis (accommodation and retail mainly), Bunratty (accommodation and Medieval Banquet mainly) and en route to and from the ferry terminal at Killimer. These are the principal locations for bus tourism in the county but outside the Geopark.

³⁰ *Fáilte Ireland, 2013 Overseas Coach Tourists – Breakdown of Expenditure While in Ireland*

³¹ *Fáilte Ireland, 2014, Tourism Facts 2013, p.2*

Environmental Impacts

The impact of bus traffic at various sites was considered. An initial list of 15 locations was compiled through a combination of site observation, examination of tour operators' websites and promotional materials, discussions with drivers and operators, local knowledge. The list comprised

- | | |
|-----------------------------|---|
| 1. Ballyreen/Alladie | 10. Corkscrew Hill Viewing Point |
| 2. An Rath Fort, Ballyalban | 11. Old Church Kilnaboy |
| 3. Ballyalban Hill layby | 12. Ennistymon Famine Memorial |
| 4. Poul nabrone | 13. Burren National Park –
Gortlecka Crossroads/Crag
Road |
| 5. Lemenagh | 14. Dunguaire Castle |
| 6. Murrough toohy | 15. Fanore Beach |
| 7. Black Head | |
| 8. Corcomroe Abbey | |
| 9. Abbey Hill | |

EirEco Environmental Consultants were engaged to initially inspect and, where necessary, monitor and assess impacts at sites used for bus stopping points.

Some of the initial sites were discounted as they are not used by buses. One site, Dunguaire Castle, was not considered further as it lies outside the Geopark.

The remaining sites were subject to an initial assessment for ecological sensitivities in Spring 2014 and on the basis of this assessment and after further investigation of bus route itineraries for 2014, six sites were chosen for impact assessment.

1. Alladie
2. Ballyreen
3. An Rath Fort at Ballyalban
4. Poul nabrone
5. Ballyalban Hill
6. Murrough toohy

It should be noted that the number of buses stopping at Murrough toohy is low and insignificant compared to other modes of transport but it was included in order to consider at least one location on the Wild Atlantic Way and allow comparisons in other studies being undertaken by the Burren & Cliffs of Moher Geopark.

At these sites, baseline habitat mapping was conducted; buses stopping were enumerated both in absolute terms and as a proportion of overall traffic numbers; site sensitivities were identified and assessed over spring, summer and autumn 2014; conclusions and recommendations were presented.

The impacts of buses stopping and passengers alighting at each of the sites was rated as 2 - *Localised but slight and capable of rapid recovery.*

An extract from the ecological report is presented below. The full ecological report is contained in Appendix 3 .

BURREN COACH STUDY

ECOLOGICAL ASSESSMENT OF STOPOVER SITES

November 2014



(EXTRACT)

The scale of impact at the six sites with ecological sensitivities was assessed based on the variation from the expected condition (at sites where disturbance has been ongoing for many years) as well as noted degradation or other impacts over the course of the tourist season (between the May and September surveys). As most locations have been used as stop-over sites for many years and receive large numbers of non-coach traffic, they already suffer from some level of degradation. The assessment of impacts was given a score based on a 5 point system. The scores for all sites where ecological sensitivities were identified were rated as 2 - *Localised but slight and capable of rapid recovery* (Fair condition).

Four of the sites, namely Alladie, Ballyryan, Poul nabrone and Ballyalban Fort (An Rath) receive a significant proportion of their visitors from coach tourism. The key impacts of tourist activity at the six sites included:

1. Trampling effects on vegetation and habitats within the zone of influence
2. The development of visible desire lines to view points or features of interest
3. Damage of road verge vegetation by coaches and other vehicles parking
4. Physical alteration or disturbance to karst by building of mini-dolmens, graffiti, or random moving of rocks
5. Littering and waste

The scale of impact in view of the numbers of visitors stopping off at the various sites is surprisingly slight and localised. However, it is important to note that there is a strong upward trend in the amount of coach traffic, and there is therefore expected to be an increase in potential impacts at sites.

The zone of influence or disturbance at each site depends on a number of factors which include duration of stop-over, the focus of interest at the site and the accessibility of the terrain. Zones of influence varied between sites but all were concentrated to within c100m of the coach parking location.

Evidence of vegetation trampling varies dependant on the extent of exposed rock at each site, as people appear to preferentially walk on the rock as opposed to the vegetation. Nonetheless, vegetation within the zone of influence for the six sites showed evidence of compaction and localised bare ground was evident at the more heavily used sites (Alladie and Ballyryan) as well as at Ballyalban Ring fort where people walk on the top of the ring fort.

Disturbance to habitats and vegetation at some of the sites was also noted from the parking of vehicles on the roadside verge where incremental damage occurs as a result of the undefined parking area. This was most evident at Alladie where a series of unofficial and unpaved lay-bys have developed. Moving of rocks by tourists to create mini-dolmens or other features was prevalent at a number of sites though recently erected signage and conservation activity by Burrenbeo Conservation Volunteers and Burren Ecotourism Network appears to have reduced the scale of this activity at certain sites such as Ballyalban Hill Lay-by and Murroughtoohy. Graffiti on rocks is apparent at a number of sites, notable at Ballyryan and Alladie.

Littering at sites is a recurrent issue and while not excessive, was evident at all six sites. Sites along the coast road appear to be regularly cleaned by local authority staff.

Whilst the ecological report considers the site sensitivities at a micro level, there are also wider considerations concerning coach tourism activity at the most popular sites i.e. access and safety issues as well as the overall visitor experience and what trends may be emerging. These are outlined overleaf for the most popular sites for bus tours i.e. Alladie/Ballyreen, Poul nabrone and An Rath, Ballyalban.

Ballyreen and Alladie

The most significant site in the landscape associated with bus stops is Alladie and Ballyreen. This is part of the Blackhead-Poulsallagh Complex SAC – limestone pavement, orchid-rich grassland, coastal grassland and rare plant site (pyramidal bugle, *ajuga pyramidalis*). The land is held in commonage and has several verge parking opportunities. On account of the different practices at the two main parking areas, it was decided to treat this area as two separate sites i.e. the northern part, Alladie and the southern part Ballyreen or Ballyryan.

Alladie

Total Buses 6500 Total Passengers 180,000

Alladie is a significant stop on the itineraries of the Day Trip operators. Approximately 6,500 buses stopped here during the 2014 season with 180,000 passengers alighting. Traffic counts indicate that buses account for over 70% of people who stop here. The operators often advertise this stop as the ‘mini-cliffs’ and as a major highlight of the trip.



This land is held in commonage with unofficial roadside parking accessible from the road with capacity for four or five buses. The area allows access to the sea on the coastal side (walk seventy metres across commonage) and to an inland karst hill expanse for longer walking.



Buses park on road verge and cross the road. Due to low suspensions, the roughness of the road verge often causes drivers to park at least partially on the road whether on the inland or coastal side (where no verge is available).



Passengers alight and usually proceed to the cliff edge and walk along (perilously in some parts) for 200 metres. They then go back across the road and climb upwards on the pavement to a height of maybe 150 – 200 feet. They often forego this in bad weather conditions. On both sides of the road, there are issues of property ownership. On the coast side, there is considerable physical danger. On the inland/hill side, there is a persistent problem with the building of mini- dolmens.



As this site attracts mainly licensed Day Trips, the buses are on a tight schedule en route to or from Galway or Dublin. Hence, they tend to arrive at specific times and close to each other. Therefore, congestion is common particularly in the late afternoon when there is often up to five buses and 300 people in the vicinity.



From our observation days, it is obvious that the level of driver responsibility regarding road safety and environmental care is generally very high. Nevertheless, this stop and its high level of use gives rise to concern on grounds of

property/access, safety (at cliff's edge and road), environmental (dolmen-building and flower-picking), congestion and quality of visitor experience.

Ballyreen

Total Buses 1950 Total Passengers 60,000

Approximately 60,000 bus passengers visit the nearby Ballyreen site. These are usually multi-day tours whereas the Alladie stops are Day Trips. Some buses come from south direction and are heading back south. They may have overnighted in Lisdoonvarna and be heading for Kerry but wish to give a short walk/photo opportunity by the sea. Hence they need to turn back at Ballyreen. Some go to Fanore to effect this U-turn but others do it at Ballyreen North, a dangerous practice.

Passengers alighting here tend to be older than those on Day Trips stopping at Alladie. The common practice is to walk towards the ocean and fan out over a range of 300 – 400 metres. This is a site mainly used by private motorists and whilst littering is obvious, observation shows that this is extremely rare in the case of bus passengers.



Poulnabrone

Total Buses 3,224

Total Passengers 99,000³²

Although an outdoor, free-entry site, Poulnabrone benefits from on-site OPW personnel between 9 a.m. and 6 p.m. daily.

Bus traffic accounts for 47% of visitors. There are a small number of bus parking bays and the capacity is currently sufficient although this may need to be reviewed as bus traffic is on an upward trend and the site is on the itinerary of all the Galway-based Day Trips and this sector is growing rapidly. At times, the practice by drivers of not using the dedicated bays can cause congestion (see picture).



Bus Bays at Poulnabrone but often these are not used

A Geopark initiative to provide people counters was initiated in late 2014 and this will be able to monitor visitor numbers in the future although it is not currently configured to recognise clusters that would be indicative of bus traffic.

Observation studies have shown that there are incidences of anti-social, anti-environmental, anti-heritage behaviour occurring outside the hours when staff supervision is in place. This includes encroachment on the cordoned area and climbing on the tomb. None of this is bus-related.

³² Estimate based on a) 3 days of counting across seasons for this study, b) previous counts conducted by on-site OPW personnel and 3) analysis of Day Trip bus figures.

An Rath, Ballyalban Fort

Total Buses 1,200

Total Passengers 45,000

Ballyalban Fort is an earthen ring fort adjacent to the R480 Road. It attracted approximately 45,000 bus visitors in 2014, almost all of whom came as part of the scheduled itinerary of one Day Trip provider.

Parking takes place on the opposite side of the road, causing passengers to cross close to a bend. It is difficult to park more than one bus at this point and this is not sufficient for the current level of use.



Parking and Congestion on bend of road opposite An Rath

Whilst the ecological report rates the impacts as “Localised but slight and capable of rapid recovery (Fair condition)”, the extent of the site’s usage and the congestion of buses at the same time gives rise to concern regarding congestion, road safety and quality of visitor experience.



Bus Passengers crossing the R470 to access An Rath

Gortlecka, Burren National Park

As the Park dropped off the schedule of any provider in 2014 and there is no single locus of concentration for the very small number of buses currently visiting, it was not selected for ecological monitoring in the current report. However, given the area's status, it is worth noting the current situation regarding bus traffic. The Burren National Park receives a small number of buses as follows:

1. The National Parks and Wildlife Service operate a Park and Ride service during the summer months from their headquarters in Corofin. This is a on hop-on hop-off basis travelling via Kilnaboy and O'Connell's Ford to the Gortlecka Crossroads, along the Crag Road and back via the Gort-Corofin Road. Thus, there is one coach operating continually during daylight hours in the summer months.
2. Commercial, guided archaeological tours are visiting Sliabh Carran on a day trip basis approximately six times per year.
3. Commercial walking tours, using large coaches are bringing German tourists and parking on the perimeter of the Park two to three times this year.
4. Burrenbeo conduct guided school tours and previously these had parked at the Gortlecka Crossroads. These stopped using this location in 2014 and moved to the Abbey Hill area and Poulnabrone.
5. Geology groups, art schools and others may make occasional use of the area, normally with smaller buses.
6. Independent school tours (i.e. not using the guide services of NPWS staff or Burrenbeo Trust) and tour operators make occasional visits and may park at the Gortlecka/Crag Road crossroads or on the Crag Road – see below. Ranger staff report that buses parking on Crag Road is very rare.



Buses at Crag Road, Burren National Park: Full-size coach rare at this location

Whilst this area does not attract significant bus traffic, it should be noted that one tour operator plans to bring up to 5,000 walking tourists in by bus in 2015.

Discussion and Conclusions

Total visitor numbers across the country are rising and bus tourism is rising as part of it. The Wild Atlantic Way has proven to be a strong brand and the industry is making strong use of it. We are likely to see a further rise in bus tourism focused on this route.

Regarding economic impacts, the low level of accommodation capacity in the area, the brevity, the growth of day trips and the attractiveness and capacity of rival locations are all contributory factors to a low accommodation yield in the Geopark area. However, parts of the hospitality sector benefit from a vibrant lunch trade. Revenue from visitor centre entry fees, catering and on-site gift shopping is obviously heavily concentrated on the Cliffs of Moher.

Bus tourism left a €7 million spend, excluding retail, in the Geopark in 2014. It is clear that it brings a significant economic impact to the area and is an important component of overall tourism, growing annually as proportion of the market. Currently about 48% of overall numbers at both Cliffs of Moher and Poul nabrone arrive by bus.

Considering commercial visitor facilities, whilst no site's capacity for visitors or for parking is consistently breached at present, there is evidence that facilities at the Cliffs of Moher Visitor Experience are close to capacity during the summer and at other holiday times and has been attempting to encourage buses to arrive at off-peak times. It currently attracts 86% of all bus visitors that attend a commercial or fee-paying visitor facility in the Geopark. The site itself has a global reputation and this has been reinforced in recent years by a number of significant factors e.g. 1) the presence of a new visitor facility with dedicated marketing staff, 2) the inclusion of the site in the name of the new Geopark entity and 3) the creation of the Wild Atlantic Way which is marketed globally and on which it is one of the iconic locations.

The Cliffs play a large role in attracting bus visitors into the area and many local attractions gain a business as a result but there are now capacity issues at the Cliffs whilst many other visitor centres have considerable spare capacity.

In consideration of free sites in the landscape, there is a concentration on sites at Alladie, Poul nabrone (it's four bus spaces at often full in summer), An Rath and to a lesser extent elsewhere. Whilst the current impacts on the ecology of sites visited are low, there are concerns about safety, congestion, access/property issues and quality of visitor experience.

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. This can be a philosophical and management debate as to the merits of honey-pot locations and their role in conserving other more sensitive sites. Whilst it is likely that most people visiting the Cliffs of Moher realise that they are going to a very popular tourism location, the concentration at Alladie for what is promoted as a wild natural experience may not be desirable into the future.

The most popular free sites attract a large majority of their bus visitors from the public day trip sector. Such trips are subject to route licensing by the National Transport Authority and licenses are subject to local authority or landowner approval for the location of stops. This, therefore, offers a possible route for the incentivizing of best practice at locations and/or dispersal policies based on stipulated thresholds.

There are also issues with passing and turning at certain points, especially between Alladie and Black Head, leading to many requests during the research phase from the coach sector for alleviation measures. The industry does not have a common approach to the best solutions. Whilst a one-way system is favoured by many drivers, it is not supported by guides (who want maximum flexibility for toilet and ATM stops) or owners. In the context of the Wild Atlantic Way being marketed and signposted as a two-way route, such a policy is unlikely to make headway.

Whilst there are some bottlenecks, it is the conclusion of this study that a one-way system for coaches is neither viable nor desirable currently.³³ On-the-road issues are compounded by the arrival of 62 and 64-seater coaches onto the route to maximise day trip revenues. Consideration of passing bays and new codes of practice may be required.

In respect of these issues, the overall context is that bus volumes are on a consistent upward trend. Currently there is considerable concentration of numbers in both an economic and an ecological sense i.e. at one hotel group, at one visitor facility and one particular free site. Without a strategy to encourage dispersal and diversification, increases in coach traffic are likely to give rise to loss of business, congestion, parking and reputational damage. To some extent, the industry is already doing this (e.g. by limited change of free site venues and timing of stops to avoid each other) but this is not having sufficient effect.

³³ *The other arguments against a one-way system are worth listing given the level of discussion that there has been on the topic during the research phase. Unlike the Ring of Kerry, buses (and other tourist traffic) enter the Burren from a variety of access points and leave by multiple exits. Day trip operators use both M6 and M7 in order to avoid all buses converging on popular spots at the same time, especially at the Cliffs and Doolin lunch venues. They alternate for the return journey. If all vehicles were to follow the same direction, it would lead to a) congestion at open air, free sites and b) pressure on the lunchtime trade which is so important to Doolin as it would contract the hours of arrival. The two-way system allows for variation of stops and time changes to avoid congestion at free sites. In other words, there are alternative free sites which can be availed of in peak-season when numbers are high. The flexibility to use these is reduced if there is a one-way system. This is vital as coach numbers increase. Overall, as capacity becomes an issue at the Cliffs of Moher, any regulation that narrows the range of time in which buses can reach the venue reduces the potential to spread or disperse the business over a longer length of time throughout the day. There is currently a concentration of business in the hours around lunchtime and a one-way system would detract from efforts to spread business throughout the day. Much of the coach traffic is centred on the Cliffs of Moher. Drivers and guides are keen to avail of clear skies and good visibility at this site and therefore, they will often delay or reverse their route on grey mornings in the hope of clearer skies in the afternoon. This option would be restricted under a one-way system. The Wild Atlantic Way is marketed and signed in both directions. Any attempt to limit it to one direction in any part of the route will disrupt South West Clare and the entire route.*

Leaving aside the desirability of dispersal, capacity at Cliffs of Moher, Poul nabrone and Alladie demands that there be urgent analysis and planning regarding the future of bus tourism. Why is this so urgent? In the three years 2011 – 2014, total visitor numbers at the Cliffs of Moher increased by 32%, bus visitors increased by 53% and the bus share grew from 40.9% to 47.7% of total numbers.

Whilst the level of recent growth is partly a bounce back from the recession, the trend of absolute growth and increased share by buses must be faced. The marketing boost of the Wild Atlantic Way makes further strong growth even more likely. If even modest growth of, say, 15% is experienced over the next three years, the Geopark will experience the following in 2017:

- 558,857 bus visitors at the Cliffs of Moher with a peak day attendance of 150 buses at the Cliffs and 166 throughout the Geopark
- 114,000 bus visitors to Poul nabrone
- 207,000 bus passengers alighting at Alladie from 7,475 buses
- Significant increases at Corcomroe Abbey and An Rath.

Early season returns in 2015 indicate very strong continued growth and so, a continuation of the recent trend must be considered. If the increase continues at this rate of 53% over three year, the impact in 2017 will naturally be greater i.e.

- 743,523 bus visitors at the Cliffs of Moher with a peak day attendance of almost 200 buses at the Cliffs and 222 throughout the Geopark
- 151,00 bus visitors to Poul nabrone
- 317,000 bus passengers alighting at Alladie from 11,436 buses
- Chaotic increases at Corcomroe Abbey and An Rath, although it is likely that operators would choose to alter locations at some point in this cycle.

Each of these locations is at capacity currently and any increase even over a longer period will pass many tipping points for the area. The inevitability of coach traffic increases cannot be separated from the inevitability infrastructure failure and the inevitable consequences for quality of tourist experience and global brand reputation. There are also increased risks associated with safety and land access issues also as well as possible risks at new locations as the industry seeks new sites in search of the 'authentic' experience far from the 'madding crowd.'

Coach tourism brings impacts of many types and these are set to increase. If such increases are to be encouraged, policy and infrastructure needs to be synchronised for them. As capacity is under pressure at various sites, a do-nothing scenario is no longer justified.

Appendix 1

List of Consultees and Data Providers

Brigid Barry	Coordinator	Burren Beo Trust
Gerard Blackall	Warden	OPW, Poul nabrone
Helen Browne	Proprietor	Poll an Ionáin, Doolin Cave
Pat Cassidy	Proprietor	Clare's Rock Hostel, Carron
Marina Clancy	Dep. Manager	Lahinch Golf and Leisure Hotel
Francis Connole	Manager	Burren Centre, Kilfenora
Antoinette Considine	Manager	Michael Cusack Centre
Jackie Cronin	Proprietor	Glynns Buses
Paddy Cusack	Traffic Section	Clare County Council
Greg Davidson	Accounts	Cliffs of Moher Visitor Experience
Martin Dillon	Proprietor	Dillons Bar & Restaurant, Inagh
Geraldine Enright	Sales & Marketing,	Cliffs of Moher Visitor Experience
Liz Fena	Sales & Marketing Manager	Clare Coast Hotels
David Flynn	Manager	Logues Lodge, Ballyvaughan
Paul Healy	Proprietor	Healys Tours
Dermot Hogan	Manager	Falls Hotel. Ennistymon
Joe Garrihy	Manager	Lahinch Seaworld
Frank/Norrie Gill	Proprietor	Monks Bar & Restaurant, Ballyvaughan
Emma Glanville	Ranger	NPWS, Burren National Park
Robert Hurley	Accountant	White Hotel Group/ Trend Tours
Adam Johnson	Proprietor	Rock Shop, Liscannor
Randy Lewis	Proprietor	Randaddys Restaurant, Lahinch
Geraldine Linnane	Proprietor	Village Stores & Tourist Gift, Ballyvaughan
Josephine McCarty		National Transportation Authority
Aoibhinn McGee	Manager	Sleepzone Hostel, Lisdoonvarna
Joanne McLnerney	Manager	Burren Outdoor Education Centre
Geraldine Minogue	Sales & Marketing Manager,	Temple Gate Hotel, Ennis
Nuala Mulqueeney	Director	Aillwee Cave
Paul Norton	Proprietor	Galway Tour Company
Brian O'Neill	Proprietor	Rowan Tree Hostel and Chair, Visit Ennis
Tara O'Sullivan Hayes		McHughs, Liscannor
John Ruddle	CEO	Shannon Heritage
Jim Shannon	Proprietor	Hotel Doolin
Nessa Skehan		Fáilte Ireland
Katherine Webster	Manager	Cliffs of Moher Experience Visitor Centre

Special thanks to the entire team at the Cliffs of Moher Visitor Experience.

Special thanks to the 200 plus bus drivers and guides who interrupted their passengers and their schedules to respond to surveys and interviews.

Appendix 2

Ongoing Actions for Longitudinal Study

The current study is the first to provide significant baseline information on bus tourism in the Geopark. In order to build on its findings and provide ongoing data to the Geopark management as well as local businesses and communities, annual monitoring is required and this can benefit from templates and contacts established in 2014.

To carry on a longitudinal study, the following actions in each of the three areas of study are easily realisable without large-scale resources. Most would be possible to conduct without recourse to external contract, subject to ongoing workload and resources within the Geopark organisation.

To enumerate buses:

Collect a) CCC annual traffic count, b) Returns from COMVE and main visitor centres via short form and follow-up and c) Returns from Geopark area hotels and lunch venues.

Obtain updated NTA updated Licence holder list and websites of operators and supplement with information from tour operators and local carriers and Bus Éireann route timetable.

To assess economic impacts:

- 1) Collect a), b) and c) above.
- 2) Survey re. accommodation and spending at COM twice in season (or only once if mid-season not possible)

To assess environmental impacts:

- 1) Do counts at main outdoor sites twice in season. Include any new sites if necessary
- 2) Repeat method used by Eireco every 3 years for existing 6 sites and in first year for any new site that emerges.

Appendix 3

Questionnaires and Surveys

Driver Questionnaire at Cliffs of Moher 17/07/2014³⁴

Tour Company Name Reg no _____	Bus Company (if diff)	Guide Yes <input type="checkbox"/> Driver/Guide <input type="checkbox"/> (tick one only)
Bus Capacity _____	Pax on Board _____	Scheduled Length of Stop (mins) _____ Time in _____
Age Profile: Mainly < 35 yrs <input type="checkbox"/> Mainly > 55 yrs <input type="checkbox"/> Other <input type="checkbox"/> (tick one only)		

Day Tour Multi-Day Tour (tick one only)

Day Trip	Multi-day Tour
What is your point of origin?	Where did you stay last night
What premises or locations did you or will also stop at on this trip?*	Where will you stay tonight
Where will you eat?	How many days is your tour? _____
Where will you shop?	Originating Point of Passengers? _____
Where will passengers get time to shop or spend money?	Point of finish within Ireland? _____
Where will you stop for toilets?	Point of origin/destination overseas _____
Would you favour a one-way system for coaches in the Burren? Yes <input type="checkbox"/> No <input type="checkbox"/>	Where was the tour sold? _____
Comment, if any	What premises or locations did you or will also stop at in Clare?*
	Where will you eat today?
	Where will passengers get time to shop or spend money today?

³⁴ Questionnaires were carried out with all bus drivers and guides in the Geopark area on 17/07/2014 and 20/09/2014. It was conducted with all buses visiting the Cliffs of Moher and at seven other locations. Directions were given to interviewers that ensured that there was no double counting.

	<p>Where will you stop for toilets today?</p> <p>Would you favour a one-way system for coaches in the Burren? Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>Comment, if any</p>
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* includes outdoor non-paying stops

Driver Questionnaire at Landscape Sites Other than Cliffs of Moher 17/07/2014

Site _____

Enumerator Name _____

Time in _____

Weather _____

Has or will this bus visit the Cliffs of Moher Visitor Centre today? **Yes** **No**

If yes, simply fill in name of tour company, bus company, reg – then proceed to observation summary

Tour Company Name		Bus Company (if diff)		Guide Yes <input type="checkbox"/>	
Reg no _____				Driver/Guide <input type="checkbox"/> (tick one only)	
Bus Capacity _____		Pax on Board _____		Scheduled Length of Stop (mins) _____	
Age Profile: Mainly < 35 yrs <input type="checkbox"/> Mainly > 55 yrs <input type="checkbox"/> Other <input type="checkbox"/> (tick one only)					
Length of Tour: Day Trip <input type="checkbox"/> 2 – 4 Days <input type="checkbox"/> if more that 4, insert number <input type="checkbox"/> (tick one only)					
Originating Point of Passengers		Today's Starting Point		Today's Destination	
Domestic <input type="checkbox"/>		Dublin <input type="checkbox"/>		Dublin <input type="checkbox"/>	
UK <input type="checkbox"/>		Galway <input type="checkbox"/>		Galway <input type="checkbox"/>	
France <input type="checkbox"/>		Limerick <input type="checkbox"/>		Limerick <input type="checkbox"/>	
Germany <input type="checkbox"/>		Cork <input type="checkbox"/>		Cork <input type="checkbox"/>	
USA <input type="checkbox"/>		Killarney <input type="checkbox"/>		Killarney <input type="checkbox"/>	
Multiple overseas locations <input type="checkbox"/>		Ennis <input type="checkbox"/>		Ennis <input type="checkbox"/>	
Other (name it) <input type="checkbox"/>		Lisdoonvarna <input type="checkbox"/>		Lisdoonvarna <input type="checkbox"/>	
(tick one only)		Ennistymon <input type="checkbox"/>		Ennistymon <input type="checkbox"/>	
		Doolin <input type="checkbox"/>		Doolin <input type="checkbox"/>	
		Other (name it) <input type="checkbox"/>		Other (name it) <input type="checkbox"/>	
		(tick one only)		(tick one only)	
Would you favour a one-way system for coaches in the Burren? Yes <input type="checkbox"/> No <input type="checkbox"/>		Hotel Name (last night)		Hotel Name (tonight)	
List any shopping or spending opportunities in Clare for you passengers:				If staying overnight last night or tonight in Clare, what evening activities, entertainment will passengers avail of?	

Observation Summary

Time in	Time Out	Length of Stay (mins)
Was engine left on during stay? Yes <input type="checkbox"/> No <input type="checkbox"/> Part of time <input type="checkbox"/> (tick one only)		
Any other bus at this site when bus arrived? Yes <input type="checkbox"/> No <input type="checkbox"/> (tick one only) How many? _____		
Estimate no. passengers who alighted?		
Estimate how many passengers read the signage? Number ____ <input type="checkbox"/> No signage <input type="checkbox"/> (tick one only)		
Estimated no. who ate/drink outside bus? ____		
Estimate no. who smoked? _____		
Estimate no. of pieces litter left (inc. cig butts) _____		
Describe extent of walking (distance)		
Any other activities (photos, building dolmens, picking flowers, climbing etc)		
Any other observations		

Hotel Survey

Managers or Accountants at all accommodation centres in the Geopark were interviewed and asked for the following information. All participated

The information sought was:

- How many buses came in 2014? How many passengers?
- How many bed nights did this account for – breakdown by number of nights per visitor
- Can you give a breakdown by month?
- What % of your overall visitor numbers came by bus?
- Can you give full year figures for 2013 and 2012?
- Are there any issues or impacts to do with this sector that you wish to tell us about?

Lunch data was also sought from accommodation providers and well as hotels/restaurants that do not provide accommodation to the coach sector.

Visitor Centre Survey

Managers or Accountants at all 11 visitor centres that attract buses in the Geopark were interviewed and asked for the following information. Nine participated and estimates were derived for others from alternative sources as outlined at Map 1.

The information sought was:

- How many buses came in 2014? How many passengers?
- Can you give a breakdown by month?
- What % of your overall visitor numbers came by bus?
- Can you give full year figures for 2013 and 2012?
- Are there any issues or impacts to do with this sector that you wish to tell us about?

Appendix 4

Ecological Monitoring Report

Following Pages.

