

BURREN AND
CLIFFS OF MOHER



PEOPLE. PLACE.
LEARNING. LIVELIHOOD.



A STUDY OF BUS / COACH TOURISM 2014

Objectives



The 2014 study on Bus/Coach Tourism in the Burren & Cliffs of Moher Geopark has three objectives:

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

The study commenced October 2013 and was completed March 2015. The focus is entirely on the calendar year 2014.

Approach/Method Statement



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.

Ecological monitoring included baseline habitat mapping, site sensitivities identification and assessment at spring, summer and autumn 2014; bus enumeration, bus surveys, bus observation, participation of bus tours etc.

For full details of methodology, see full-length report.

Defining the Sector

Buses may look the similar but no two buses are identical in their impact



With up to 150 buses in the area on peak days, their impacts vary greatly depending on whether they take lunch, stay overnight, visit a fee-paying facility, only stop at free facilities or cater onboard as seen below.



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

A Day in 2014 in the Burren – Overall Bus numbers and figures for Cliffs of Moher Visitor Experience



Average Day

60.5 Buses to COMVE
1,473 pax

72 Buses in Burren
1,657 pax

Peak Season Day

94 Buses to COMVE
2,600 pax

115 Buses in Burren
3,180 pax

Busiest Day

129 Buses to COMVE
3,371 pax

145 Buses in Burren
3,900 pax

Where do they Go? 1) Pay-for Sites



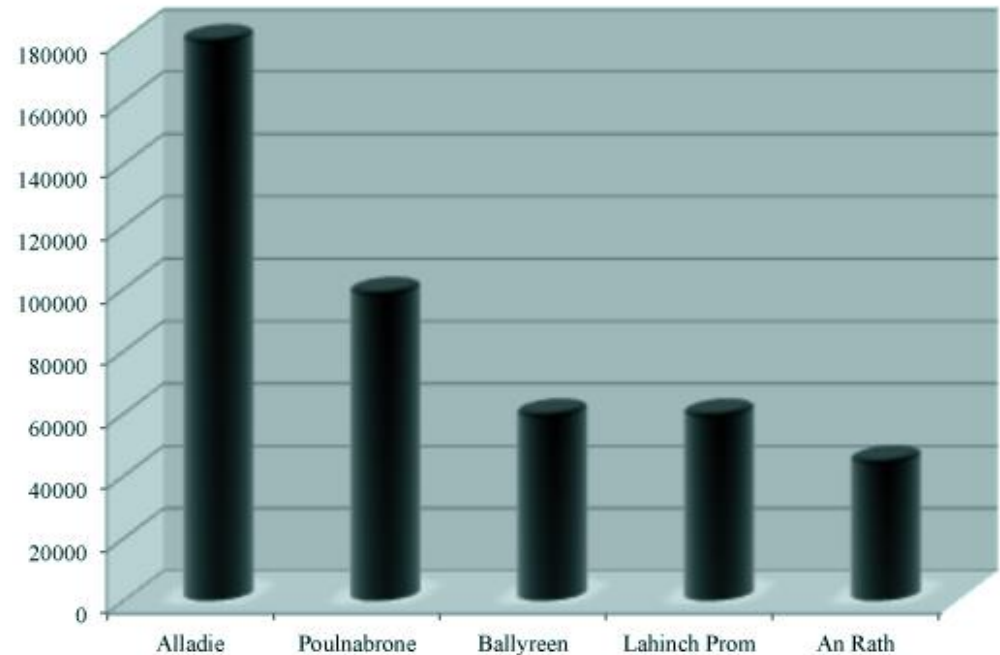
- **86%** of all bus passenger visits to Visitor Centres were to the Cliffs of Moher Visitor Experience
- **17,980** buses carried 485,963 passengers to the Cliffs of Moher
- **2,957** buses carried 78,121 passengers to next 10 commercial sites. – Aillwee Cave, Caherconnell, Burren Centre (Kilfenora),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

Where do they Go? 2) Free Sites



There were approx.
20,000 stops with
550,000 passengers
alighting at free sites in
the landscape

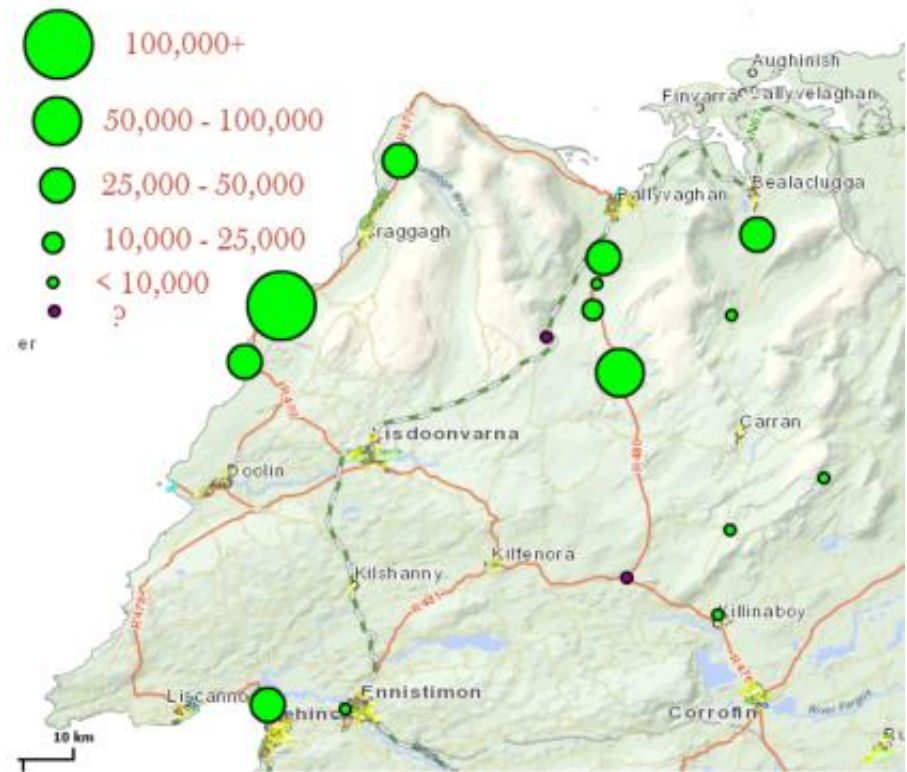
Alladie is the most
popular as it is on the
schedule for 98% of
licensed day trips.



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

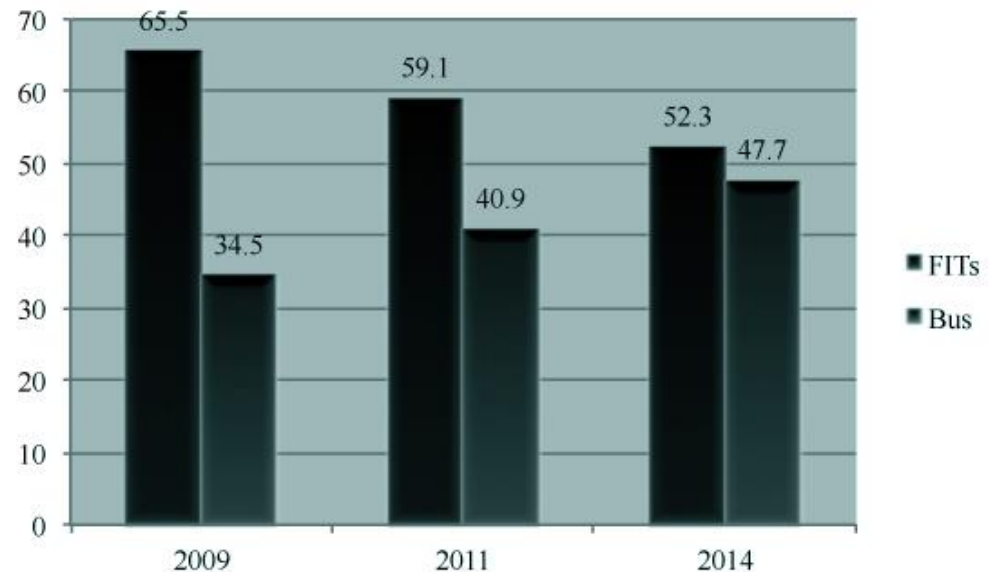


Trends – Bus Passengers vs FITs (Fully Independent Travellers)



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

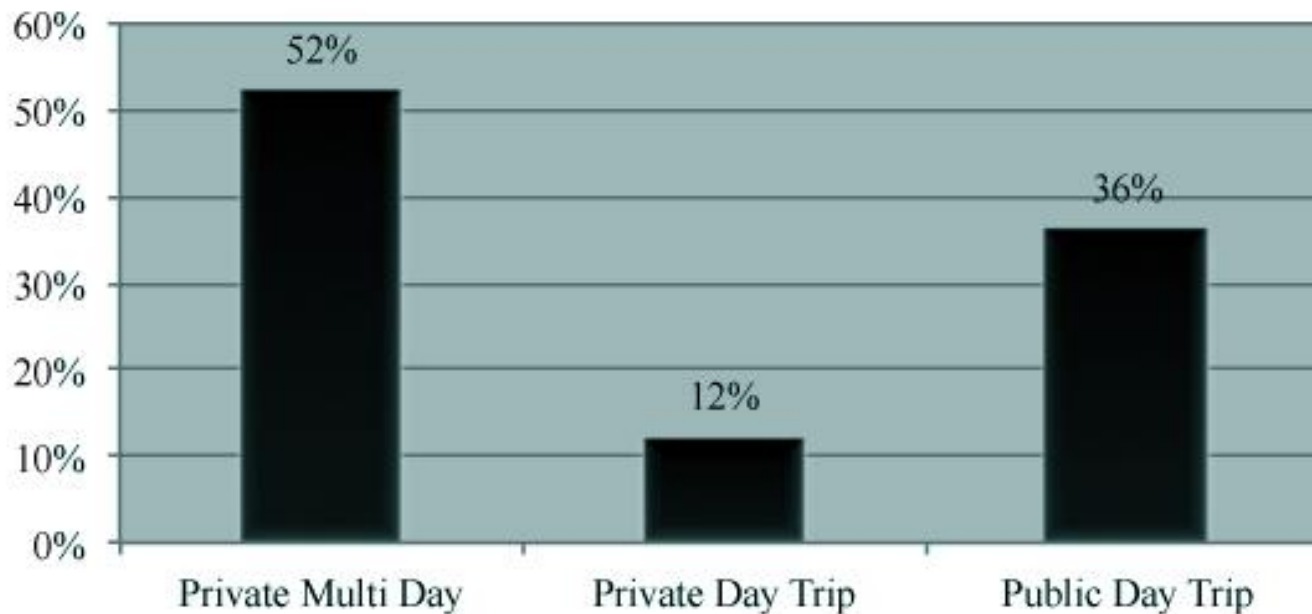
Steady and significant
change in period 2009 –
2014. Bus passengers
now comprise almost
half (47.7%) of all
visitors to COMVE



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



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

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.

Economic Impacts



200,531 lunches

52% of all buses make their lunch stop within the Geopark area

Over 90% of public day trips (113,217 passengers) make their lunch stop in Doolin, (most of remainder in Ballyvaughan)

Economic Impacts



Accommodation – most come in and out of the Geopark without an overnight stay

- **252,000** passengers travelled through the Geopark on overnight tours in 2014 **BUT** this yielded just 66,446 bed nights.
- For every 100 bus visitors, there were 26 bed nights. As some stay for more than one night, just **18% of all passengers on multi-day tours stay in Geopark area/Lahinch/Liscannor**
- One tour/hotel group accounts for 69% of these bednights
- There were a further 55,440 bed nights in the rest of County Clare – mainly Ennis, Dromoland and Bunratty.

Bed Nights 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

Opportunity - Impact of Getting One Extra Bus to Eat or Stay in a Geopark Village



In high season 2014, there were 115 buses in the Geopark each day.

If one more of these can be persuaded to stay for lunch or overnight, the economic impact will be as follows (based on 9 month season or 273 days x 37 pax = 10,101 pax):

Lunch Benefit of 1 extra bus

- High End Lunch (all eat lunch + 1 drink @ €12) = €121,212 = 4.3 direct jobs
- Lower End Lunch (50% lunch, 50% coffee/snack) = €60,606 = 2 jobs

Accommodation Benefit of 1 extra bus

- Low end (€25) D/B&B – €252,525 plus entertainment = 8.5+ jobs
- Higher 3* (€50) D/B&B – €505,050 plus entertainment = 17+ jobs

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, Murroughtoohey, 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.

Ailladie 180,000 by Bus*



Safety - road, cliff edge

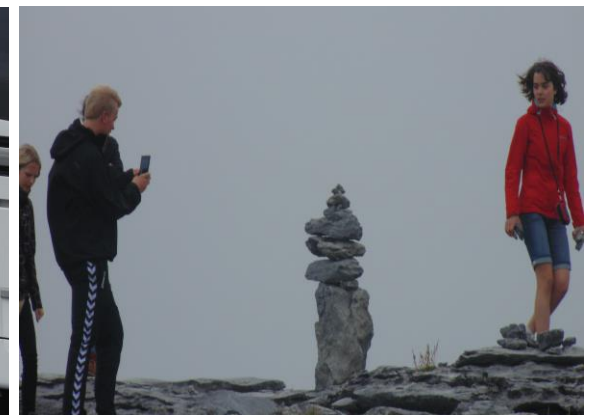
Legal/Access - commonage

Congestion – similar itineraries, arriving at peak times

Quality of Experience – becoming crowded, lacking tranquility

Environmental (localised, capable of recovery)

*figure derived from approx 160k day trips and 20k multi-day trip passengers



Poulnabrone Total 99,000 by Bus



Bus Parking Capacity is normally sufficient at present but trend is upward and capacity will be regularly breached soon



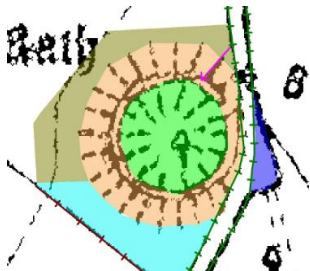
Empty bus bays



2014 peak time

An Rath (45,000) and Overflow Itinerary to Cahermore

Issues include Parking, Dangerous Bend, Congestion



Ballyreen

Total 60,000 by Bus



Although adjacent to Alladie, Ballyreen is treated separately as it attracts a different type of bus and activity - multi-day tours, not day trips, older passengers, less active. Mostly photos and short walk. The site is used equally by bus passengers and FITs.



At the remaining sites of Murroughtoohy and Ballyalban Hill, the proportion of bus passengers is less than a quarter of all those who stop. Onsite observations show that, proportionately, they contribute less to negative impacts such as littering at these shared 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, Poulnabrone. Facilities at the Cliffs of Moher and Poulnabrone 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.**



Thank You



Thanks to all the visitor centre managers and owners, hotel managers and owners, restaurateurs, drivers, guides, bus company owners and managers who helped so much.



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THANK YOU