

Burren & Cliffs of Moher Geopark Life Programme Visitor Survey



Research Details

- The main objectives of the project were as follows:
 - To create a transferable model for sustainable tourism destination development built on partnership
 - To show measurable environmental, social and economic benefits of the model
- Research was conducted with visitors to the Burren Geopark at 9 specified locations
- The following sites were the specific interviewing locations:
 - Fanore Dunes
 - Blackhead Caherdunirgus Stone Fort
 - Aillwee Cave
 - An Rath
 - Cahermore
 - Poul nabrone
 - Carran Church
 - National Park
 - Slieve Carran Reserve
- Over 500 interviews were completed, spread disproportionately across the specified location depending on visitor numbers
- Fieldwork was conducted face from 5th September to 11th October 2014



Analysis of Sample for each location



	Total	Fanore Dunes	Blackhead Caherdunirgus Stone Fort	Aillwee Cave	An Rath	Cahermore	Poulnabrone	Carran Church	National Park	Slieve Carran Reserve
		COASTAL		CENTRAL					EASTERN	
Total	533	82	52	82	42	34	84	45	69	43
Gender										
Male	53%	51%	62%	51%	55%	65%	48%	53%	54%	44%
Female	47%	49%	38%	49%	45%	35%	52%	47%	46%	56%
Age										
Under 35	37%	35%	37%	48%	26%	12%	45%	33%	33%	42%
Over 35	63%	65%	64%	51%	73%	89%	55%	67%	66%	58%
Social Class										
ABC1	76%	70%	69%	66%	79%	85%	86%	82%	72%	81%
C2DEF	24%	30%	31%	34%	21%	15%	14%	18%	28%	19%
Country of Residence										
ROI	33%	51%	27%	34%	33%	24%	19%	13%	45%	40%
UK	10%	17%	6%	9%	2%	12%	10%	11%	7%	16%
Mainland Europe	28%	18%	37%	28%	26%	18%	36%	33%	25%	26%
USA/Canada	23%	10%	25%	21%	33%	32%	33%	33%	16%	16%
Australia/NZ	3%	1%	6%	2%	2%	3%	2%	4%	4%	2%
Other	3%	2%	-	6%	2%	12%	-	4%	3%	-

Overall Satisfaction with the Burren: almost two thirds of those interviewee were very satisfied with their trip to the Burren and only nominal negative feedback



Base: All, n=533



97%/98%/99% Satisfied/Very Satisfied for Central/Eastern/Coastal

Recommend Doing or Seeing

"Enjoy as much as you can on both sides, from coast and more inland"

"Come and speak to the locals, some of the nicest people on Earth"

"Just enjoy the rocky landscape and coast"

"Walk and explore off the beaten track"

"Visit the Ailwee Caves and take a walk in the National Park"

"Look around, immerse yourself in nature, look at the ocean and realise after here is America"

"Cliffs and coastal road to Blackhead"

Q26 How would you rate your overall satisfaction with your trip to the Burren, on a scale of 1-5 where 1 means very dissatisfied and 5 means very satisfied?

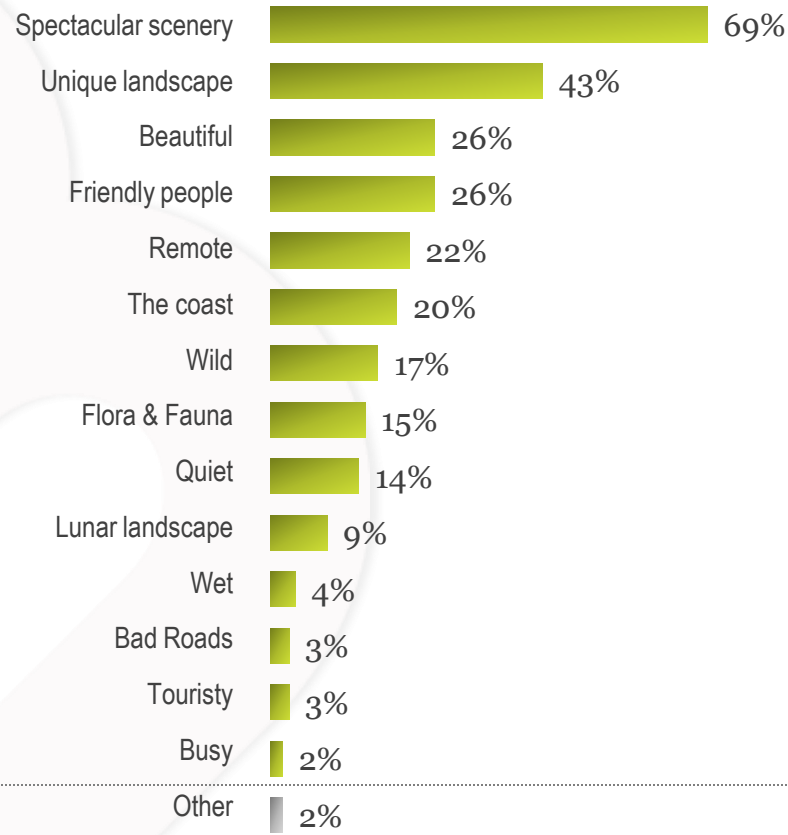
Q.27 Is there any **one** thing about the Burren in particular that you would advise other visitors/holidaymakers **to do or see**?

First Impressions of the Burren



Base: All, n=533

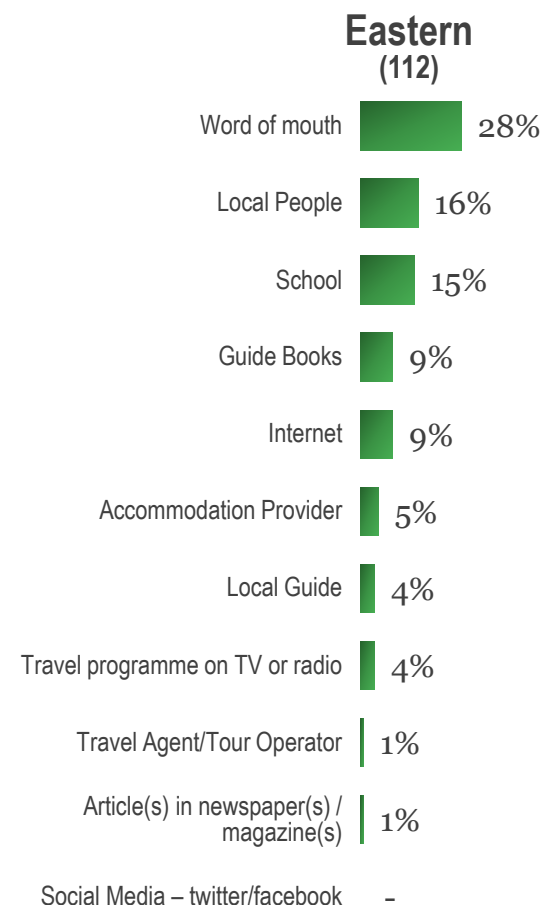
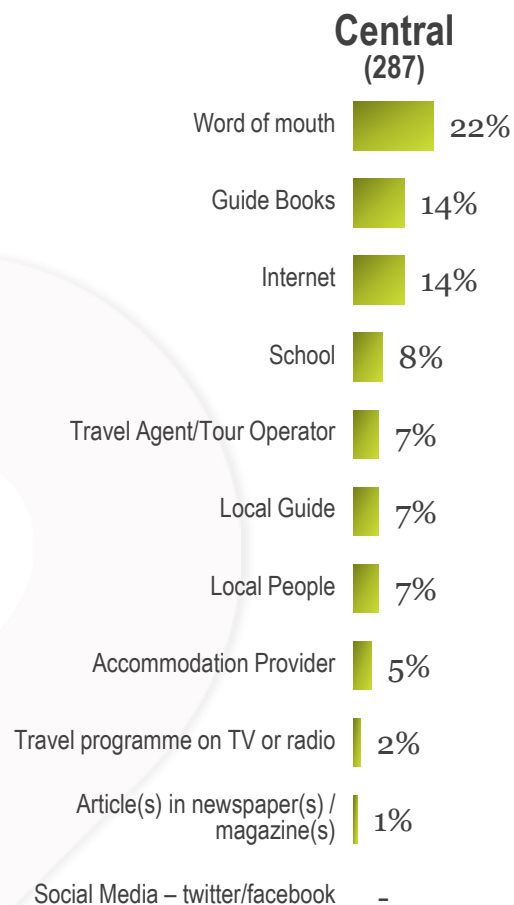
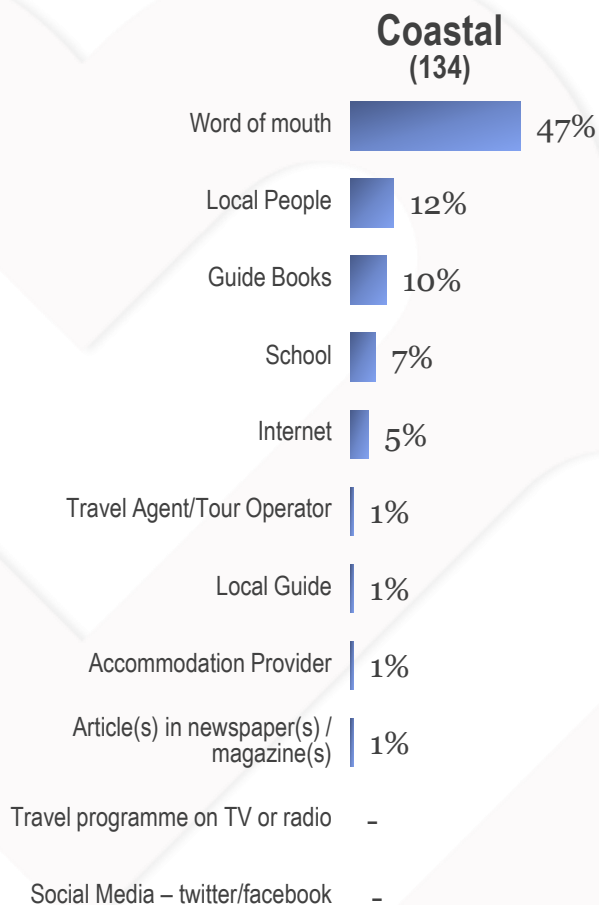
First Impressions



Sources of Information – First Mention



Base: All, n=533



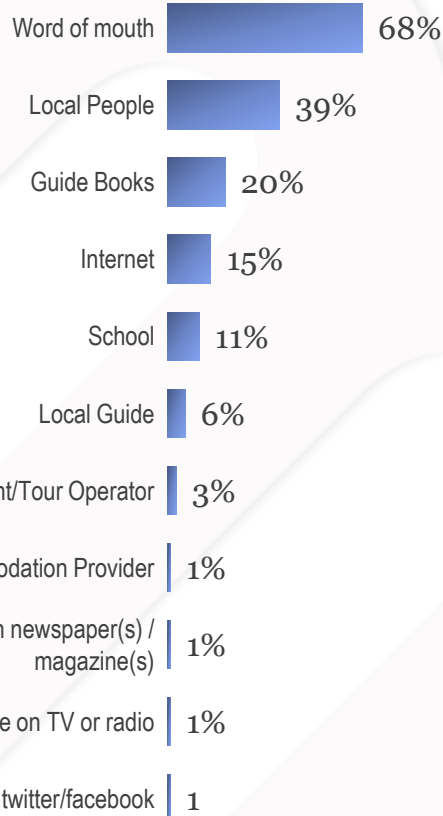
Sources of Information – All Mentions

The main source of information is word of mouth, with the mix of attractions on offer in the Central area leading to a more varied sources

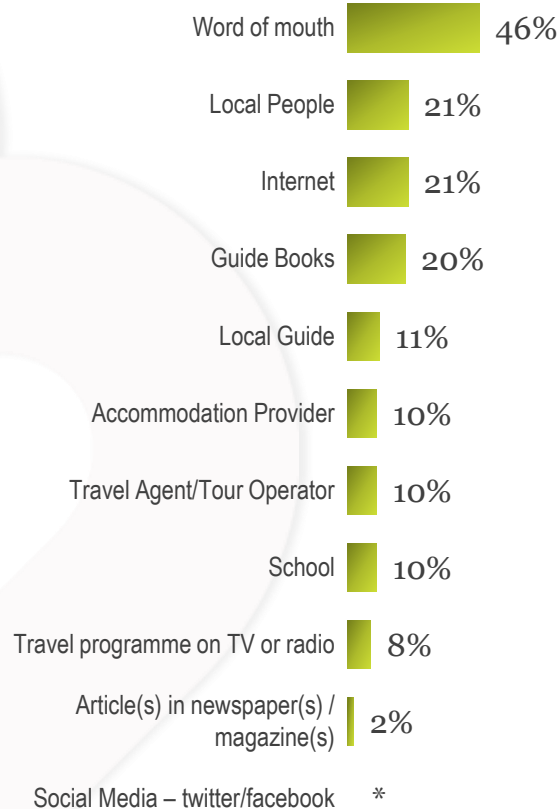


Base: All, n=533

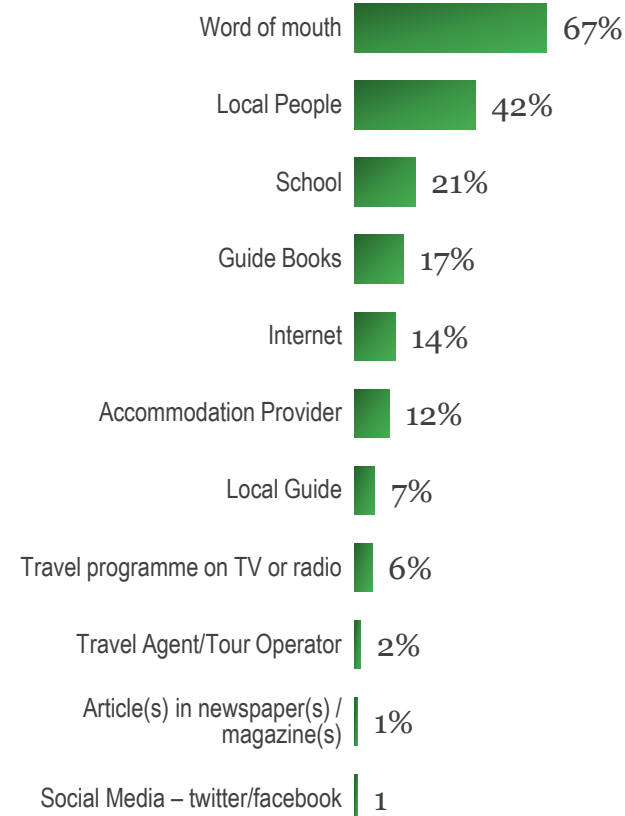
Coastal (134)



Central (287)



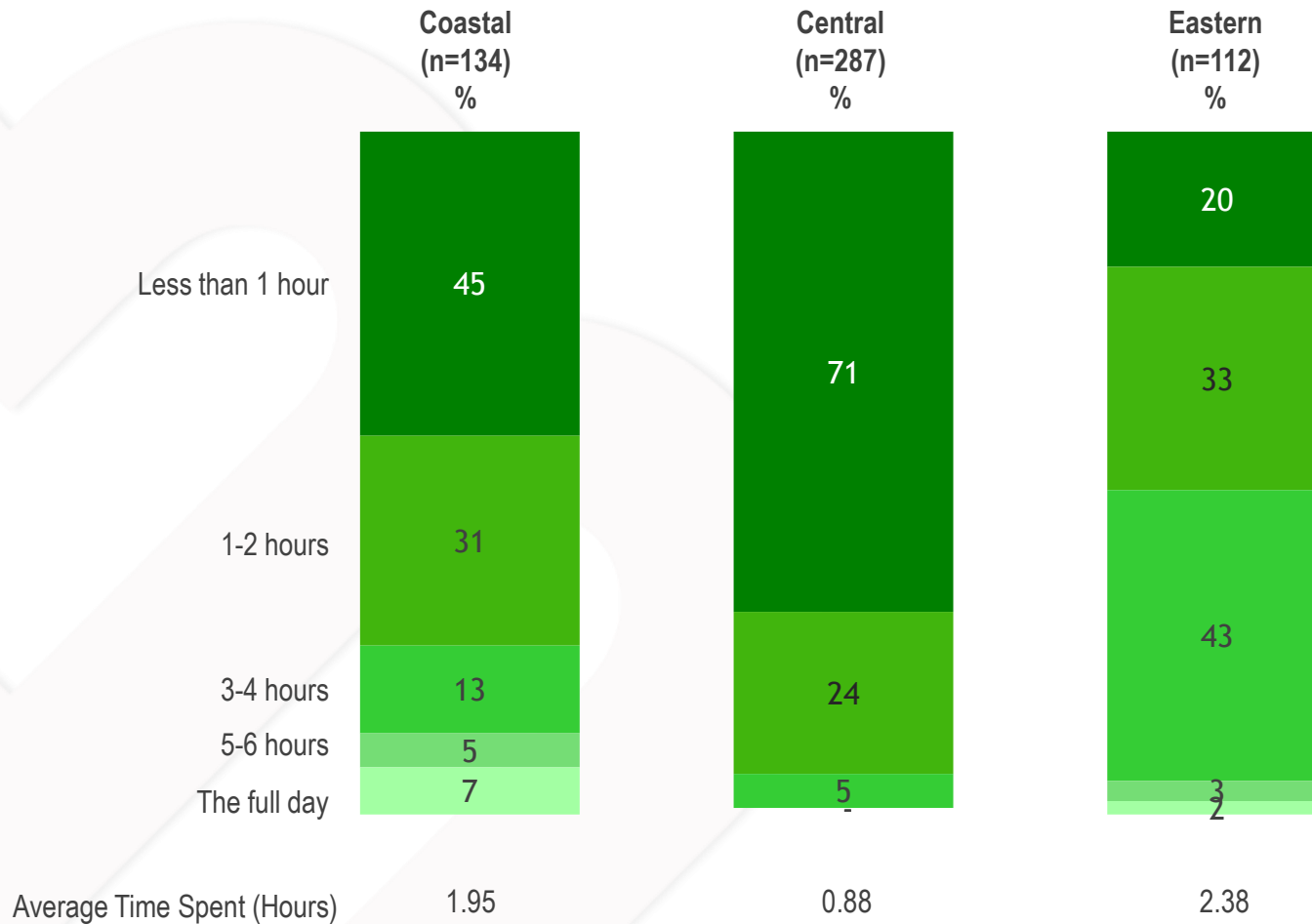
Eastern (112)



Time spent at locations varied by site/area, with almost three quarters in the central part of the Burren staying less than an hour, an average of two hours in the Coastal region & those interviewed in Eastern region visited for the longest given the type of activities on offer



Base: All, n=533



Longest Time Spent
Slieve Carran Reserve: 2.43
Shortest Time Spent
Carran Church: 0.54



The Eastern region did not perform as well as Central & Coastal especially in terms of signposting and parking, but notices were well received

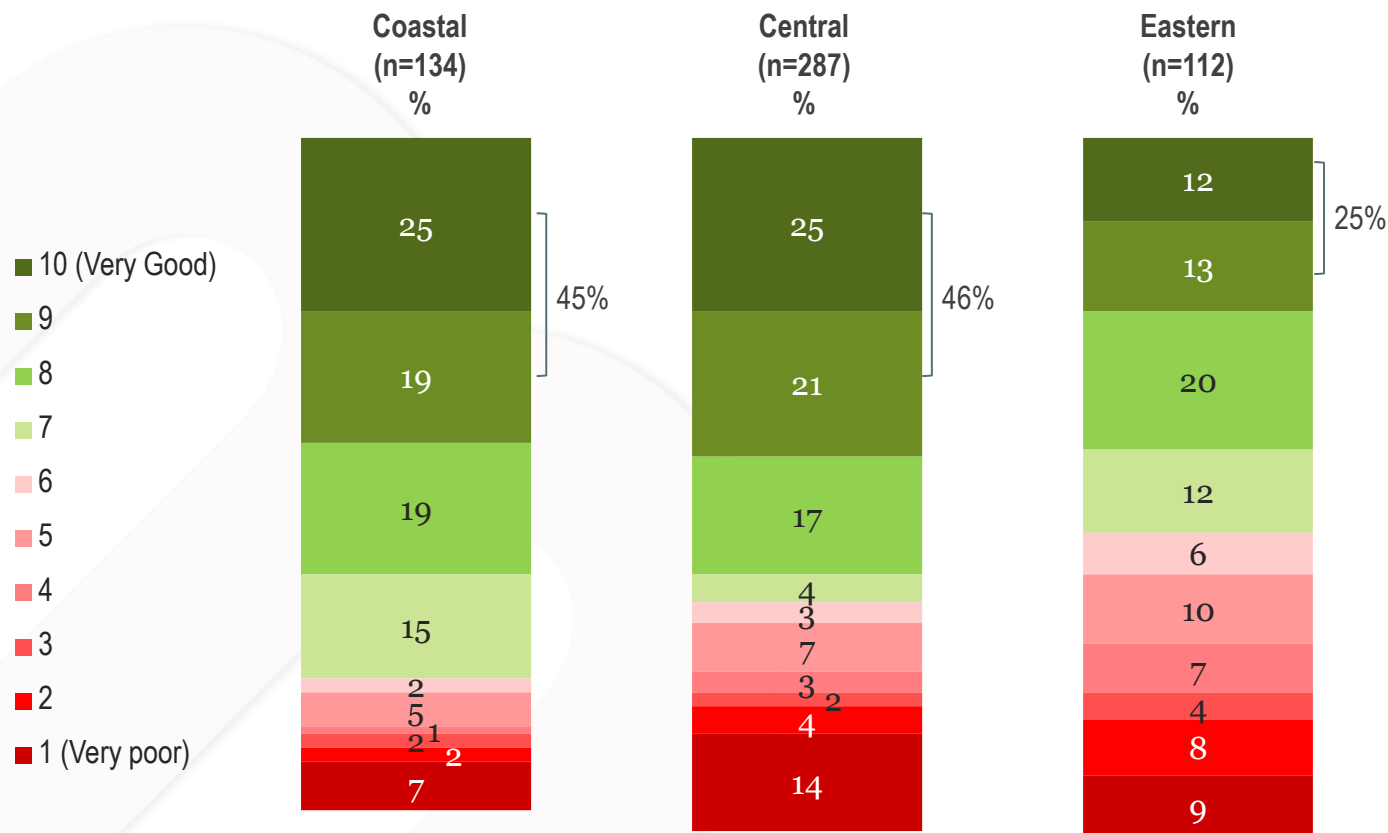


Base: All, n=533

	COASTAL	CENTRAL	EASTERN
(Base)	(134)	(287)	(112)
Signposting (9+/10)	45%	46%	25%
Physical Entries (9+/10)	54%	59%	50%
Parking (9+/10)	54%	54%	38%
On Location Information:			
Noticed	72%	76%	87%
Read	68%	79%	70%
Add to Understanding	98%	90%	95%
Overall Satisfaction with Site	99%	97%	98%

Signposting and Directions

Base: All, n=533



"Wandered around a lot"

"No signs at all"

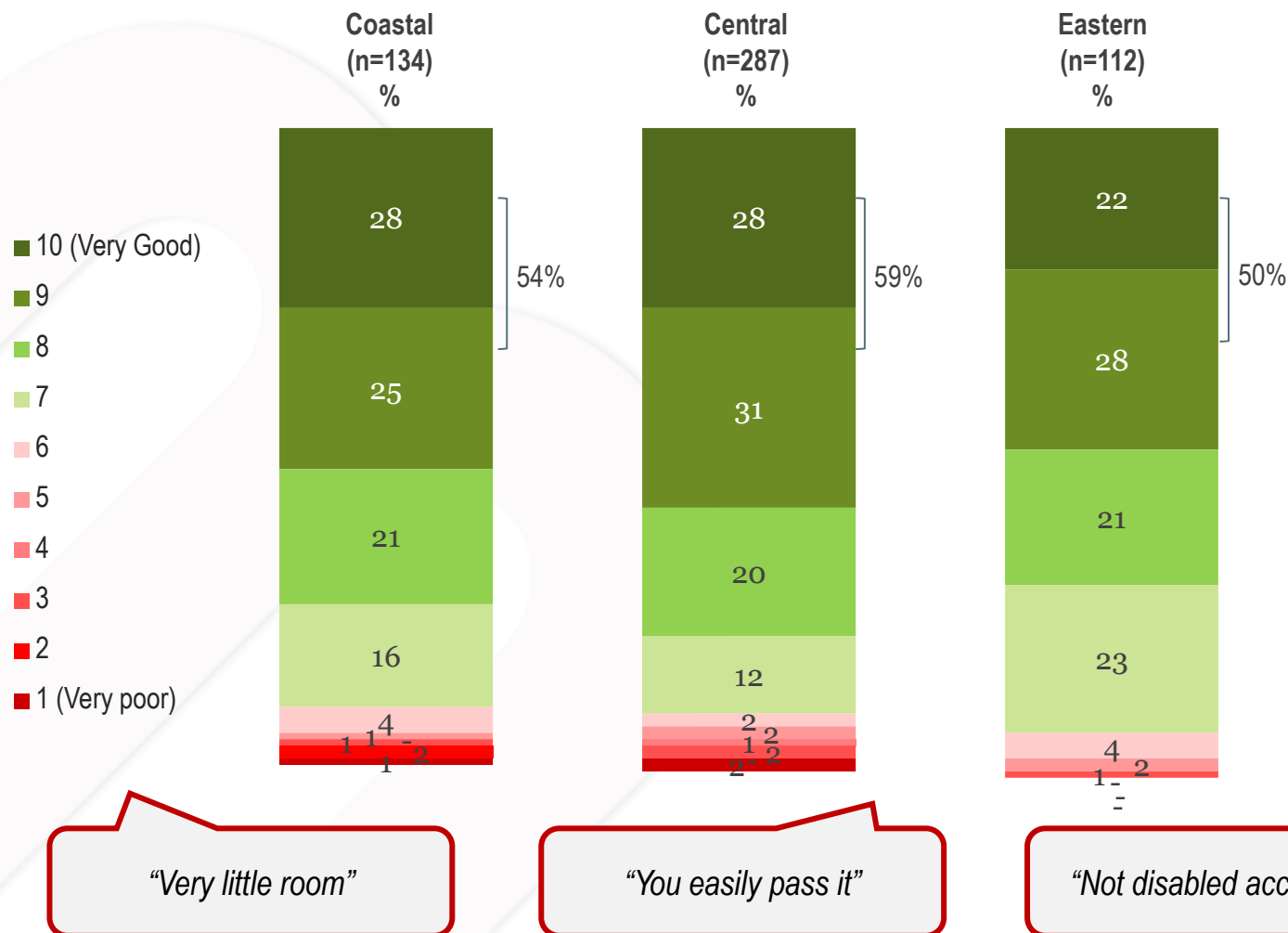
"Signs from the main road are poor coming from Ballyvaughan"

Q3a How would you rate the sign posting for directions to this site on a scale of 1-10, where 1 means the sign posting is very poor and 10 means the sign posting is very good?

Q3b If rated 1-6 at Q3a Why do you say that?

Physical Entries to Sites

Base: All, n=533

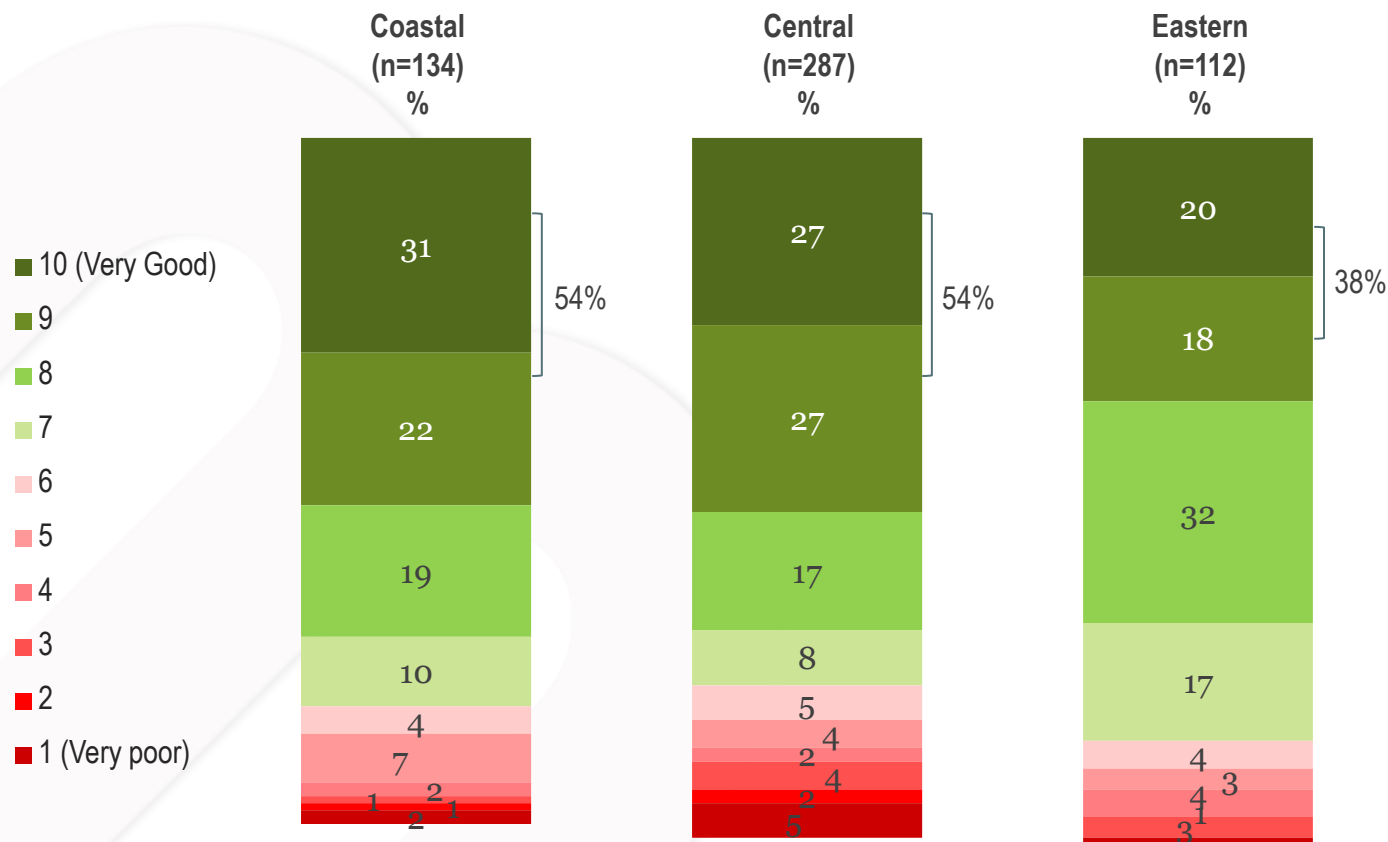


Q.4a How would you rate the physical entry to this site, by this I mean the stiles and footpaths as you enter the site on a scale of 1-10, where 1 means the physical entry points are very poor and 10 means the physical entry points are very good?

Q.4b If rated 1-6 at Q4a Why do you say that?

Parking Facilities

Base: All, n=533



"not much room if groups come"

"Only room for three cars but good all in all"

"No parking spaces"



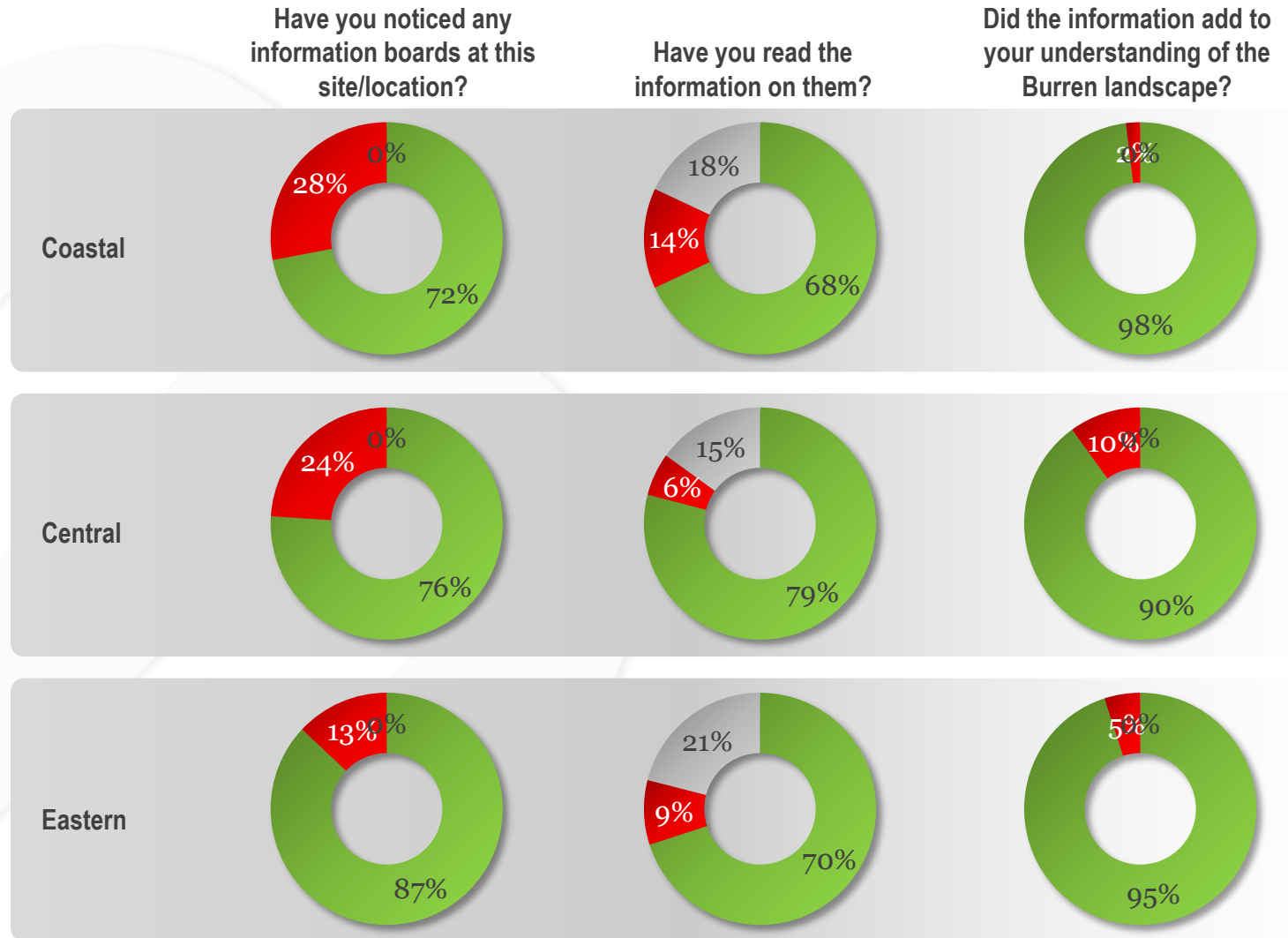
Q.5a How would you rate the parking facilities at this site on a scale of 1-10, where 1 means the parking facilities are very poor and 10 means the parking facilities are very good?

Q.5b If rated 1-6 at Q.5a Why do you say that

While many see information boards, they do not always read them fully, but when they do the impact on their local understanding is very high



Base: All, n=533



■ Yes
■ No
■ Partially

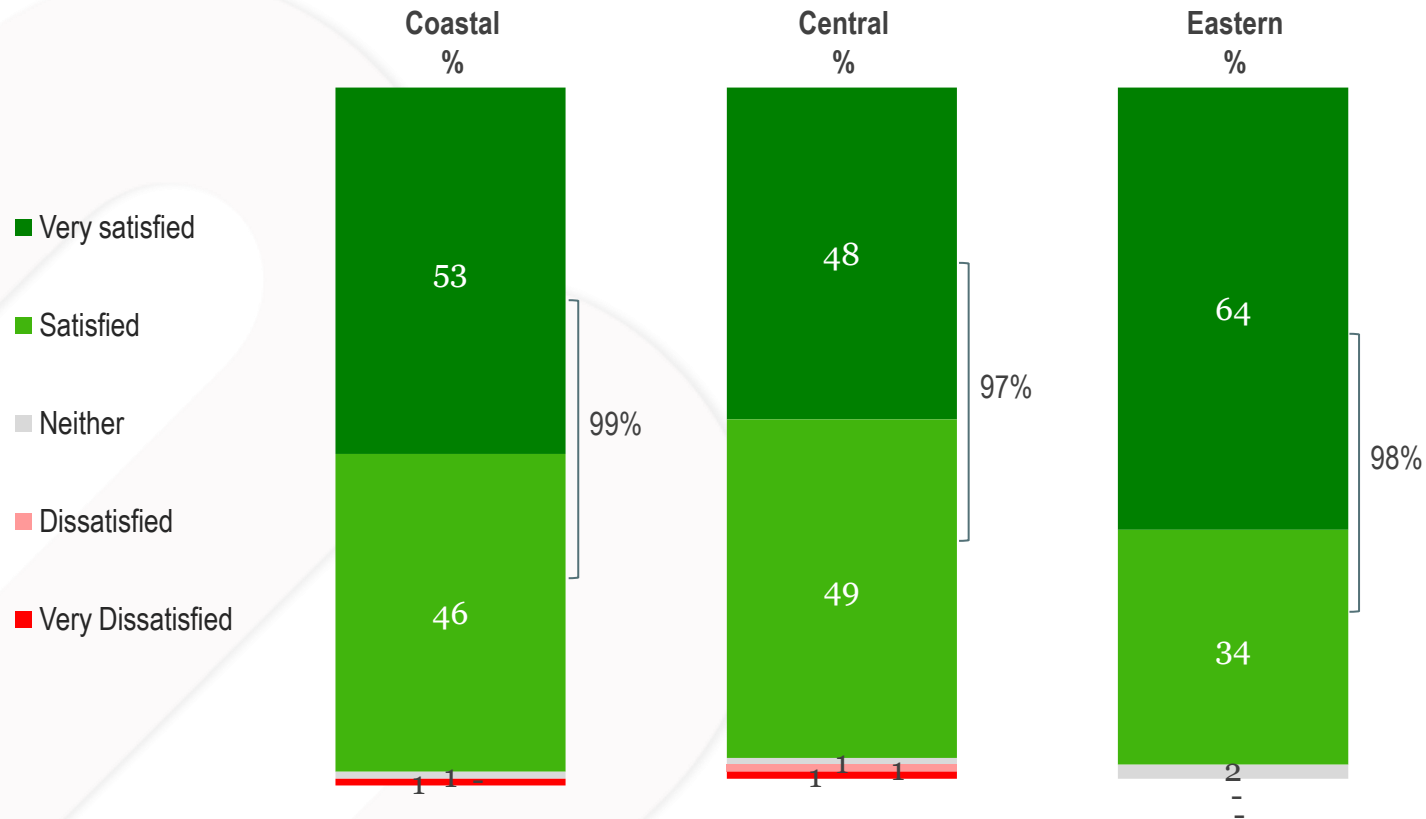
Q.6a Have you noticed any information boards at this site/location?
 Q.6b Have you read the information on them?
 Q.6c Did the information add to your understanding of the Burren landscape?

Overall Satisfaction with Site

Satisfaction levels are extremely high across the three areas



Base: All, n=533

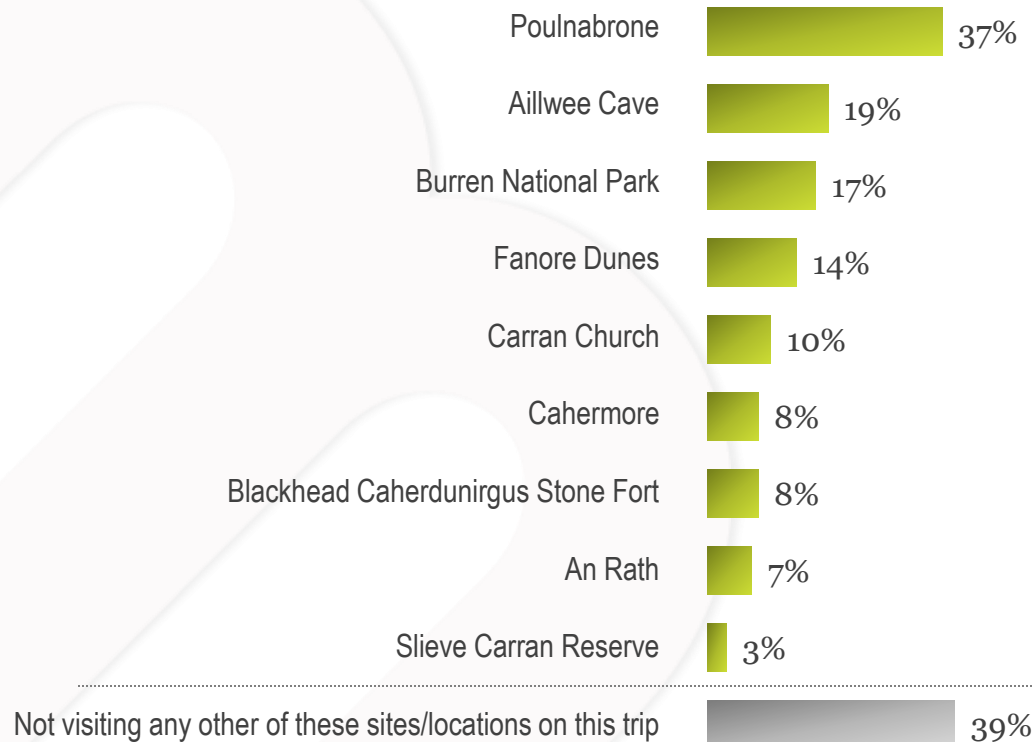


Q7a How would you rate your overall satisfaction with your visit to this site, on a scale of 1 to 5 where 1 means very dissatisfied and 5 means very satisfied?

Poulnabrone was the most visited site followed by Aillwee Cave, Burren National Park and Fanore Dunes



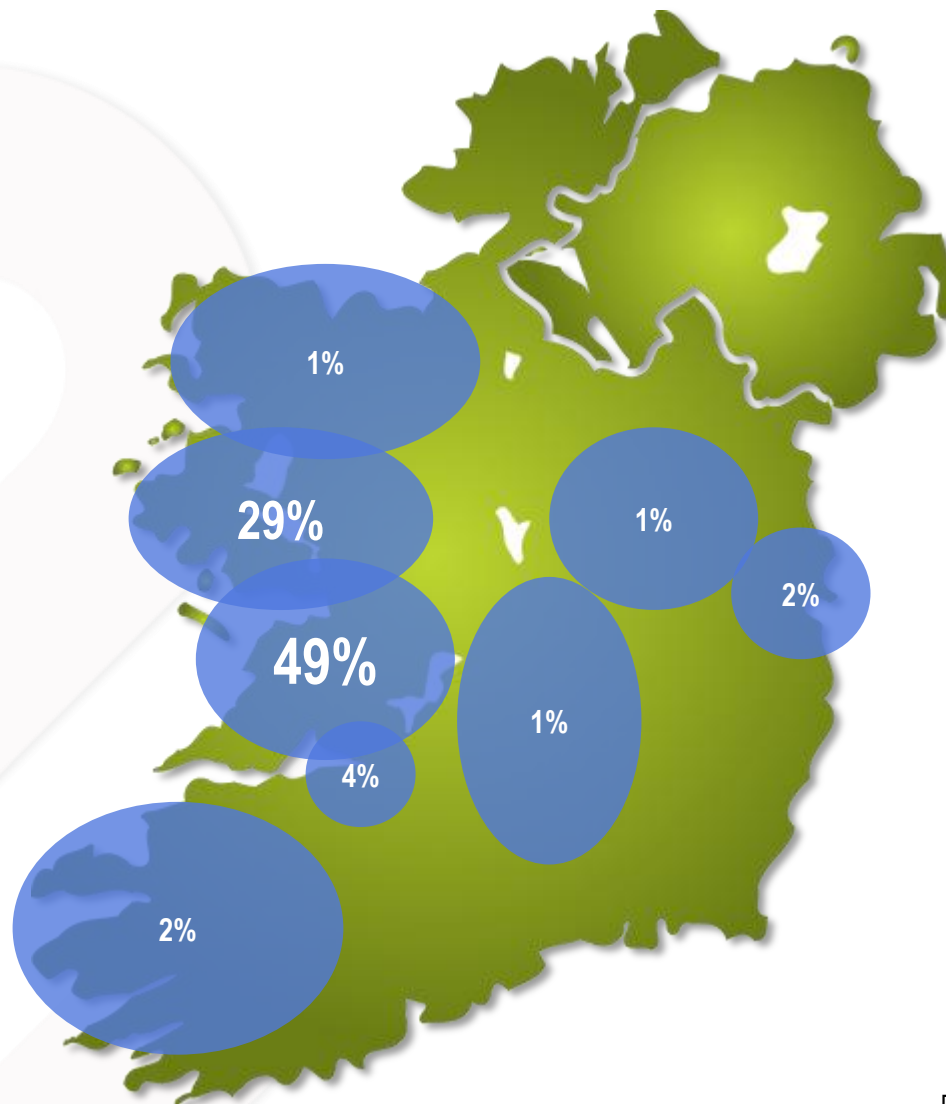
Base: All, n=533



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



Base: All, n=533



Shading indicates area covered

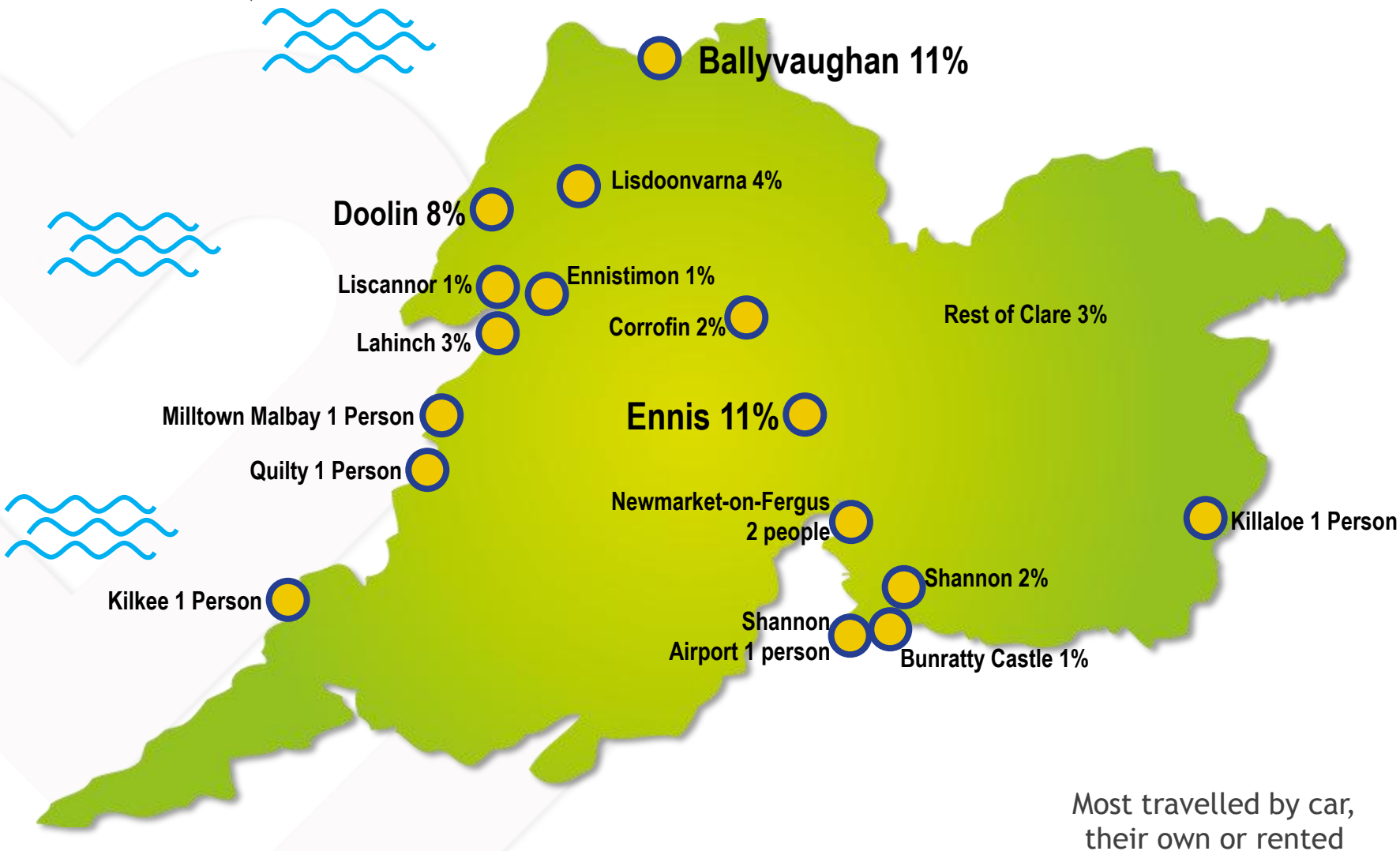
Refused 11%

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

Those who travelled from within the Clare region had stayed in a variety of locations with majority travelling from Ballyvaughan, Ennis & Doolin



Base: All in Co. Clare, n=255

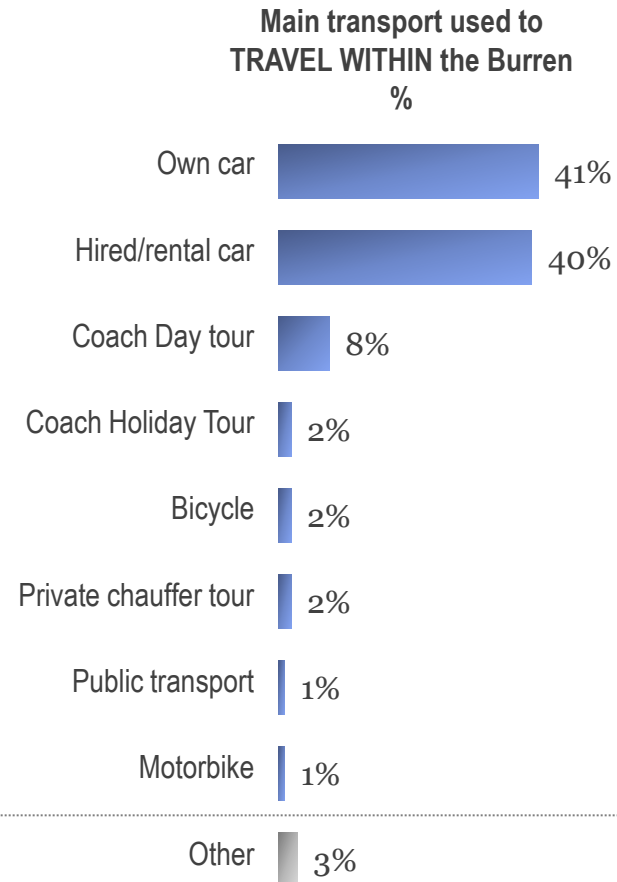
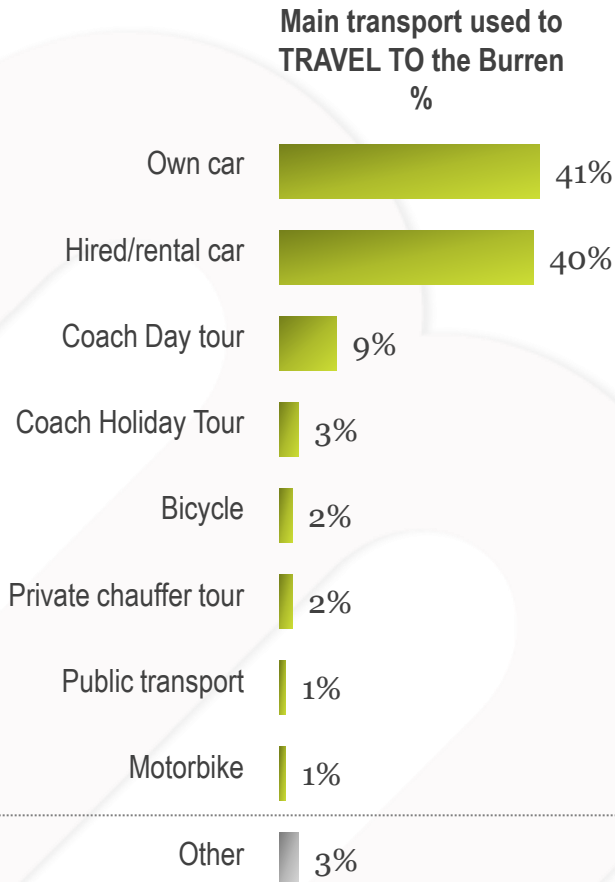


Modes of Transport

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



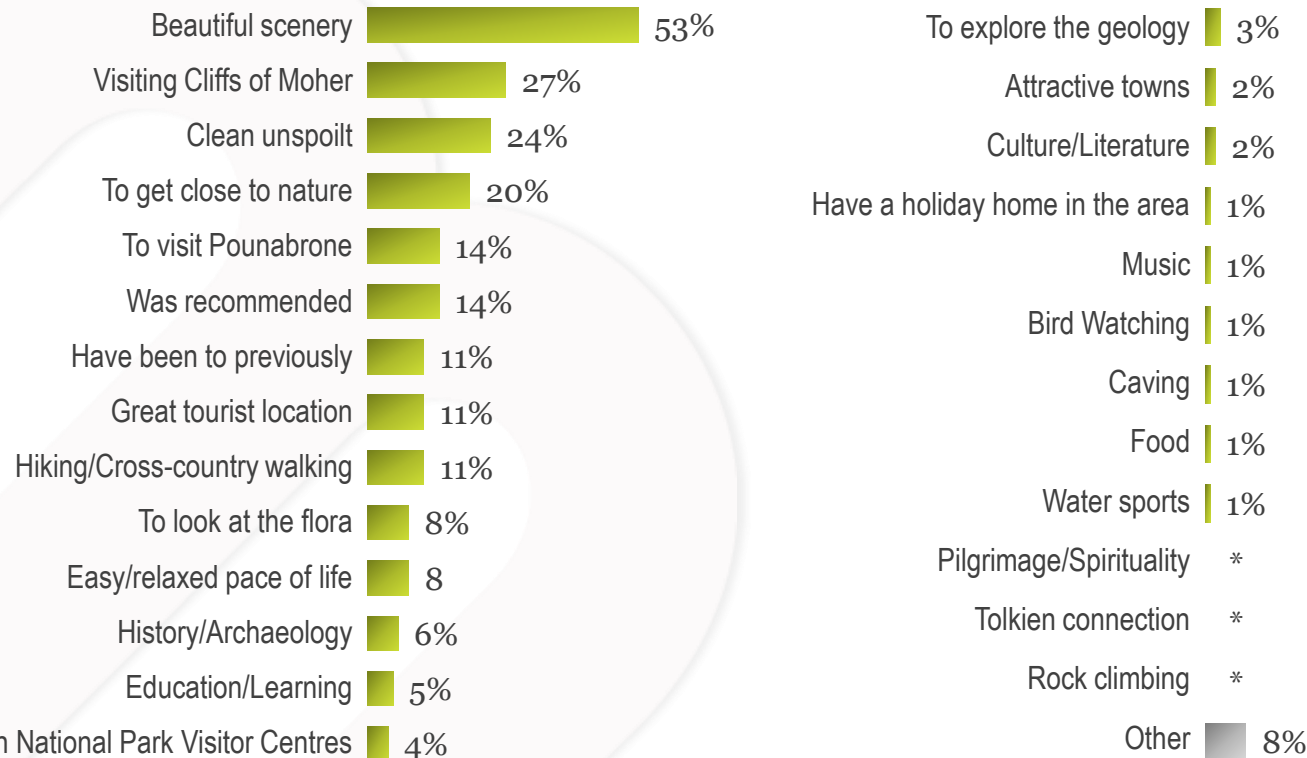
Base: All, n=533



The beautiful landscape, especially the Cliffs of Moher, the unspoilt landscape and being close to nature are the main draws to the Burren



Base: All, n=533





"Just taking in the view"

"Cliffs are mindblowing"

"Discovered that I never get tired of it"

"Variety of flora"

"Fr. Ted's House"

"Amazing rock formations"

For two thirds of respondents it was their first visit to the Burren. Those that had visited previously over half claimed that they were regular visitors (5+ times)



Base: All, n=533

Been to the Burren before?



40%



60%

65% of those that have been before are from Ireland

Base: All that have been before, n=214

How many times have you been in last 3 years?

Once	21%
2-4 times	23%
5+ times	57%

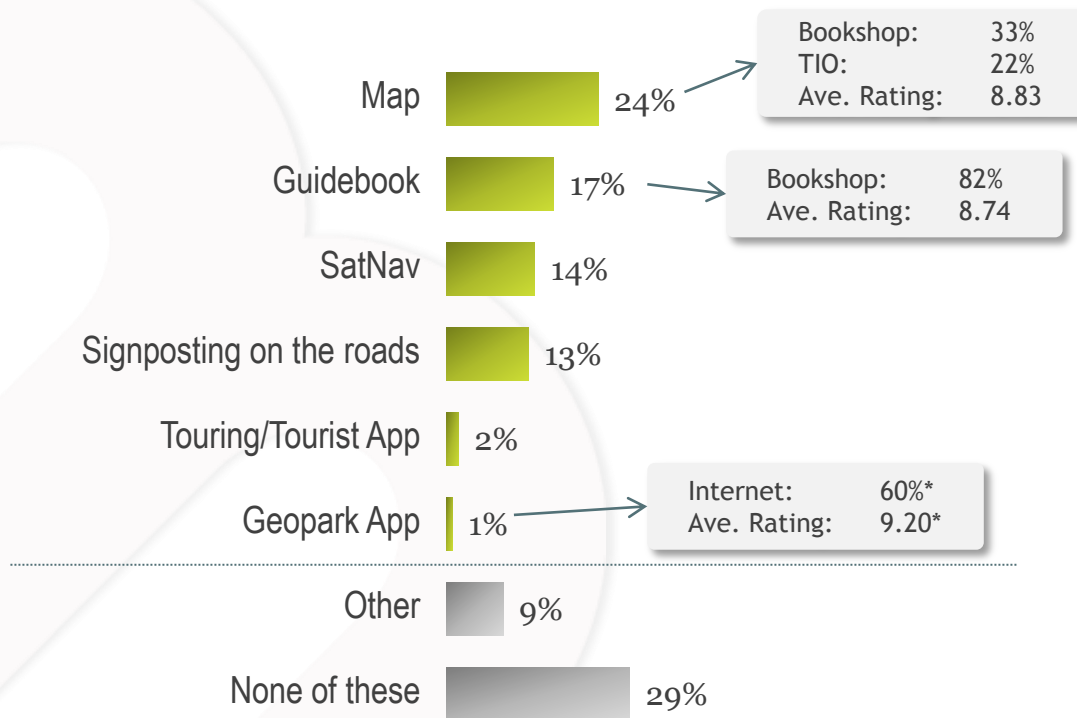


26% of those visiting 5+ times were interviewed at Fanore Dunes

Assistance for navigating the Burren came from various sources, maps and guidebooks the most popular



Base: All, n=533



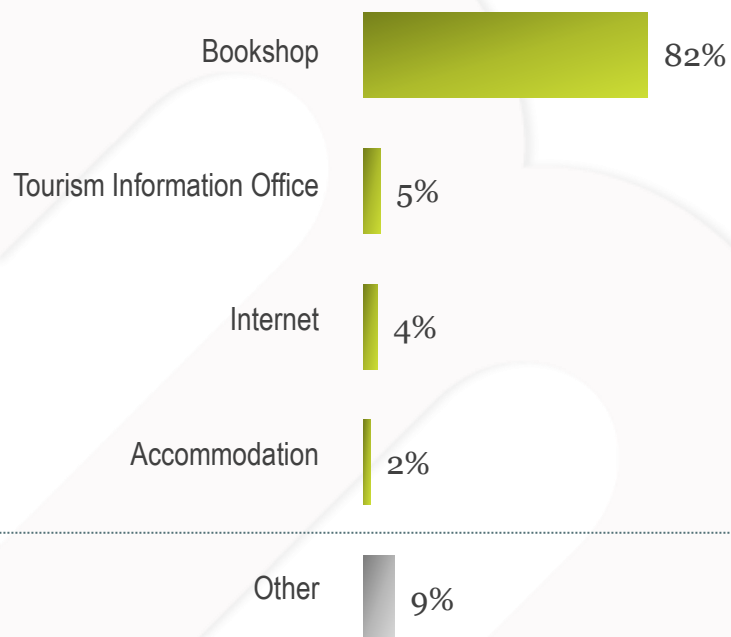
*Caution: Very small base size

Guidebooks

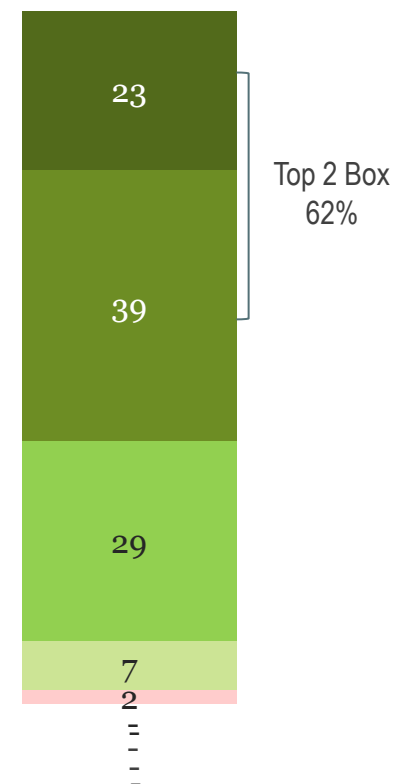
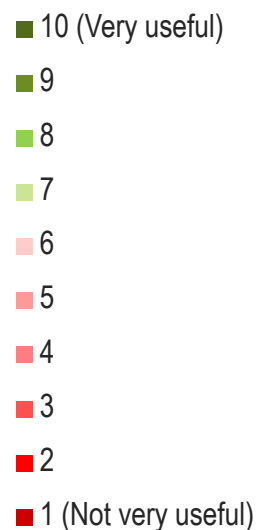


Base: All with Guidebook, n=92

Where did you get the Guidebook?



How useful is the Guidebook?



Q.16a Where did you get the guidebook?

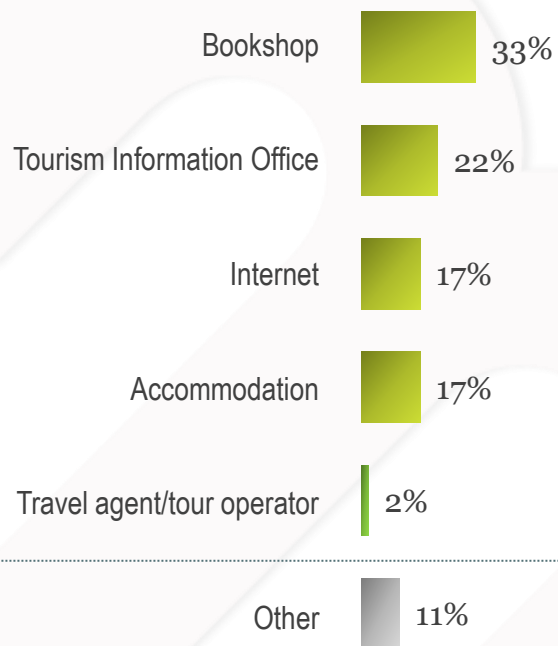
Q.16b How useful is this guidebook, on a scale of 1-10, where 1 is not very useful at all and 10 is very useful?

Maps

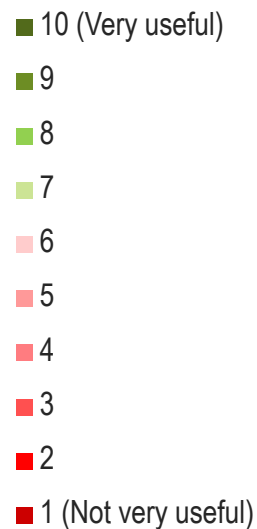


Base: All with Map, n=127

Where did you get the Map?



How useful is the Map? %



Top 2 Box
66%

"Not detailed enough"

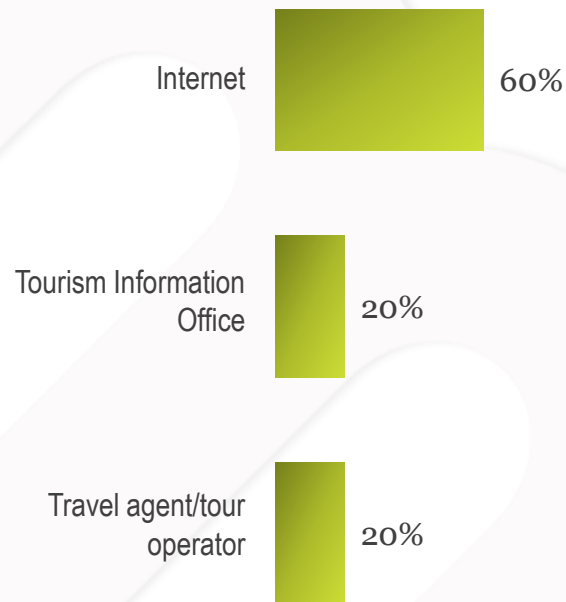
"Doesn't contain info about smaller destinations"

GeoPark Smartphone App

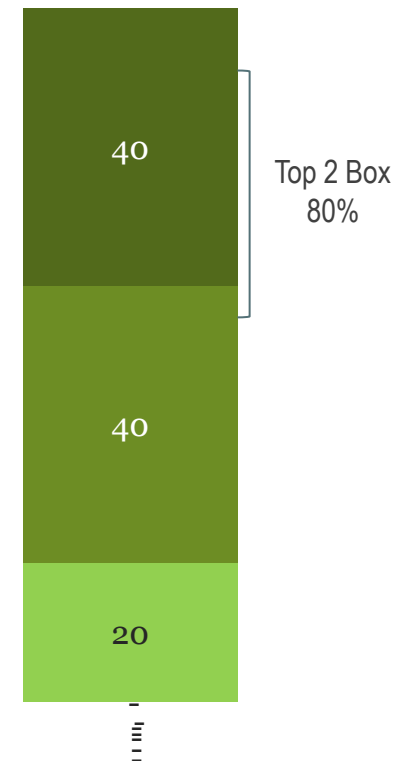
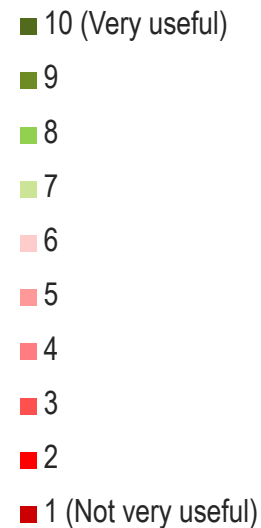


Base: All with Geo Park App, n=5*

Where did you get the Geo Park App?



How useful is the Geo Park App?



*Caution: Very small base size

When did you source your information?



Base: All using Information, n=333

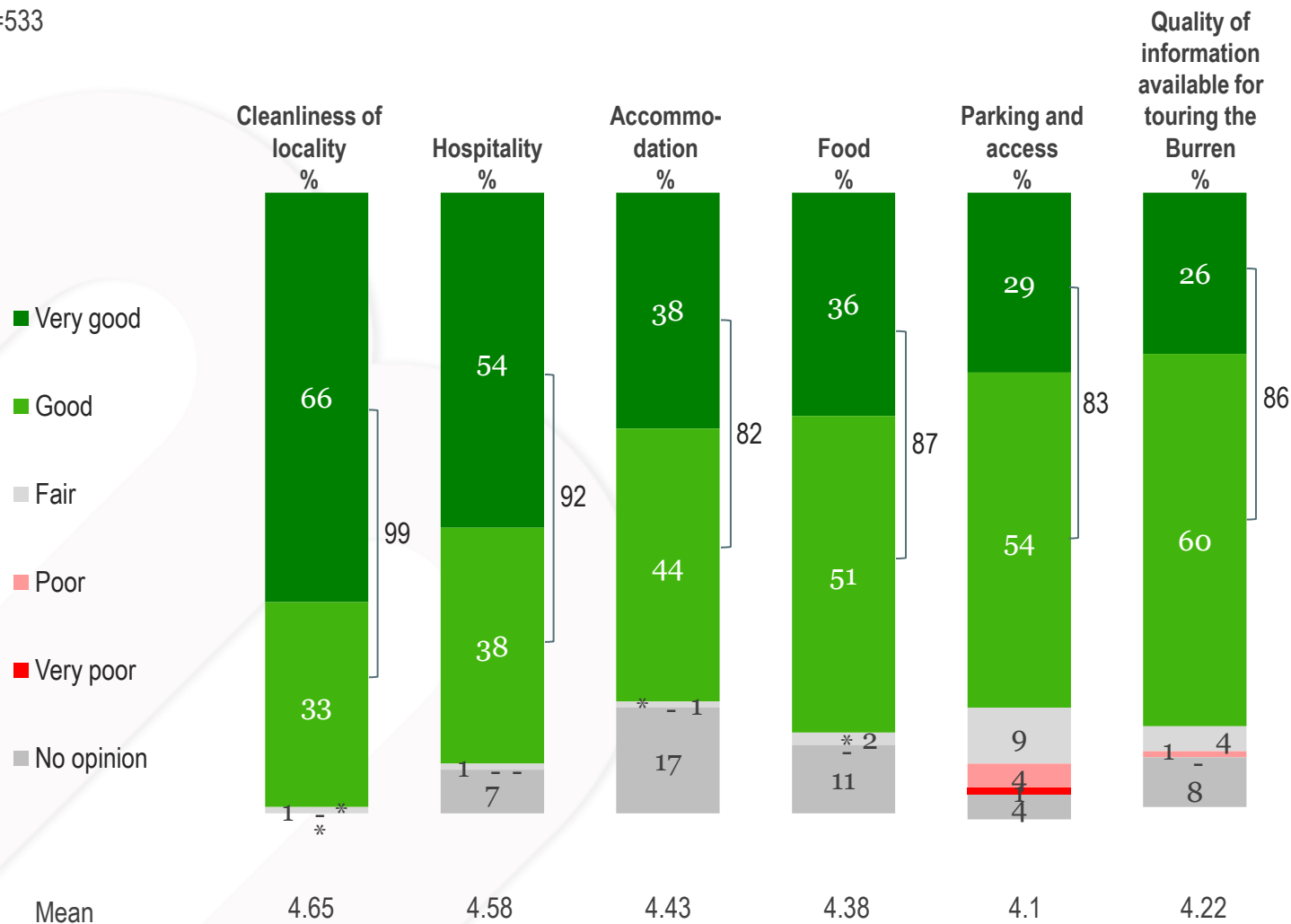
Did you source your information either before or during your visit?	
Before my visit to the Burren	55%
Both before and during my visit	25%
During my visit to the Burren	20%



Two thirds claimed that the Burren was very clean & more than half claimed that the hospitality was very good. Food and accommodation was also perceived as good by 8 out of 10. The parking and access and the quality of information available may be areas to focus on



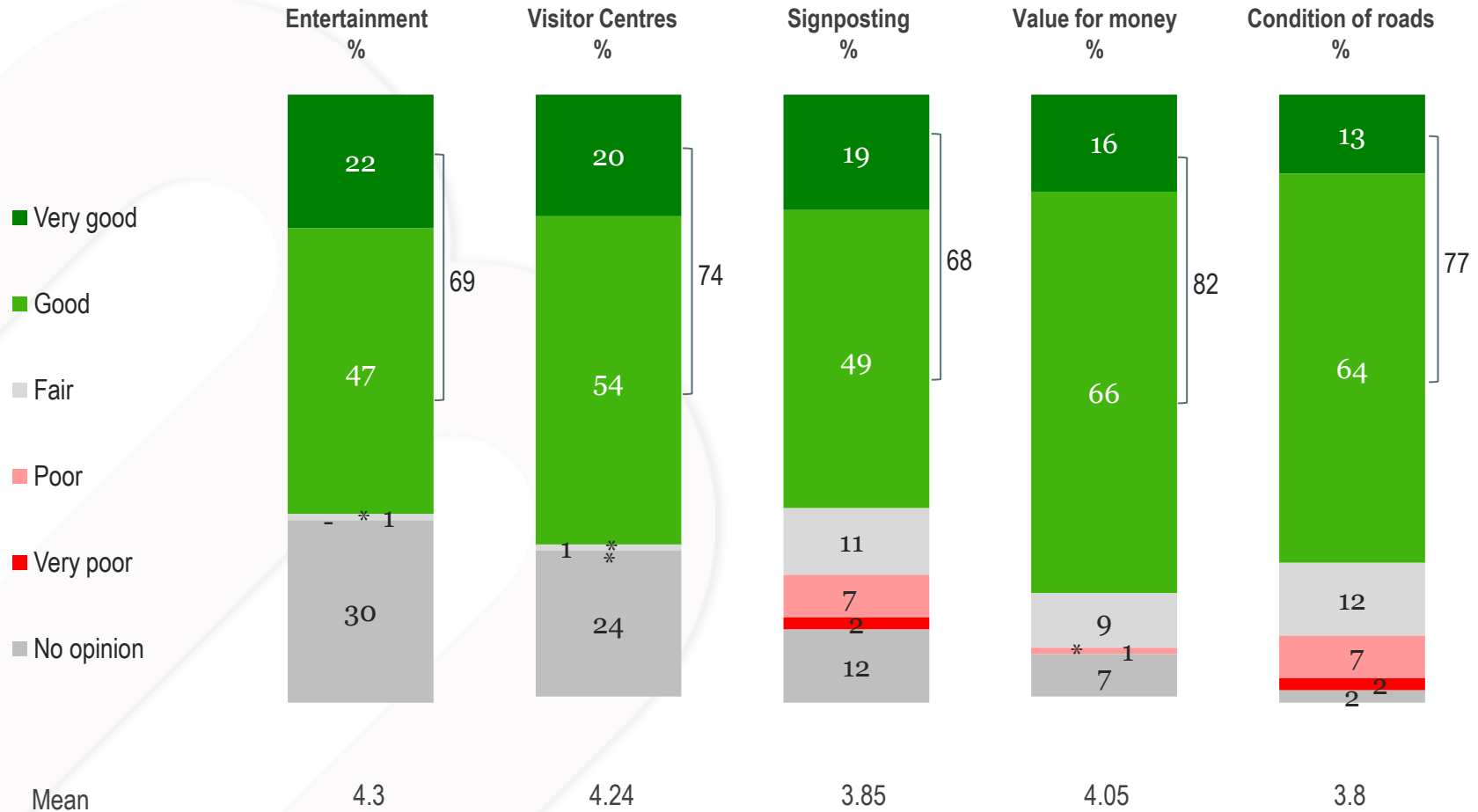
Base: All, n=533



Experiences in the Burren are generally very positive, 8 out of 10 claimed the area was good value for money. The visitor centres were also rated as good by over three quarters . The conditions of the roads and signposting also scored well although there was some negativity



Base: All, n=533



Feedback: Reasons given for low ratings



"More information should be available on geological matters"

"Not enough information leaflets available freely"

"The entrance fee is too much for the Ailwee Caves"

"The roads are narrow and bumpy but if they were too big, the place would be full of cars"

"Accommodation is too expensive"

"No signs about how to get to historical sites"

"signposts are like wildlife lucky if you see one. but it is part of the charm"

"Parking in some places is good, like the Cliffs of Moher but it's very bad in other places"

"The roads are narrow; not wide enough for buses to pass us"

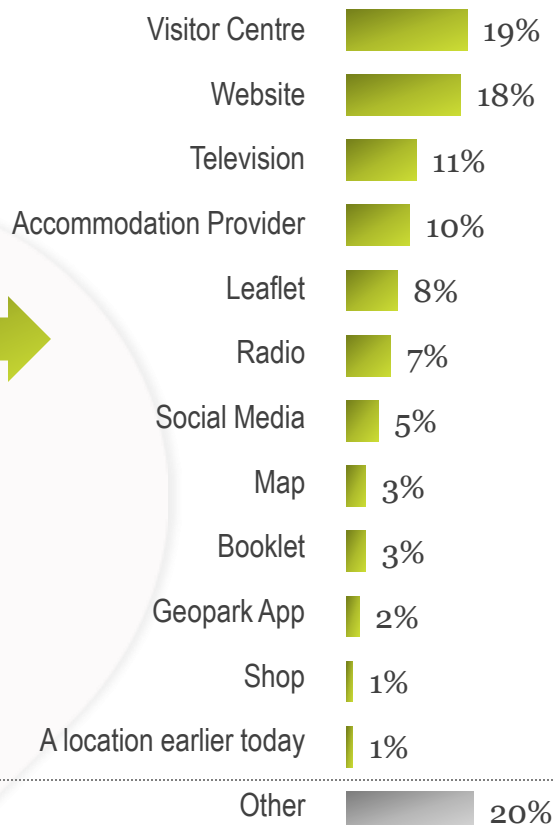
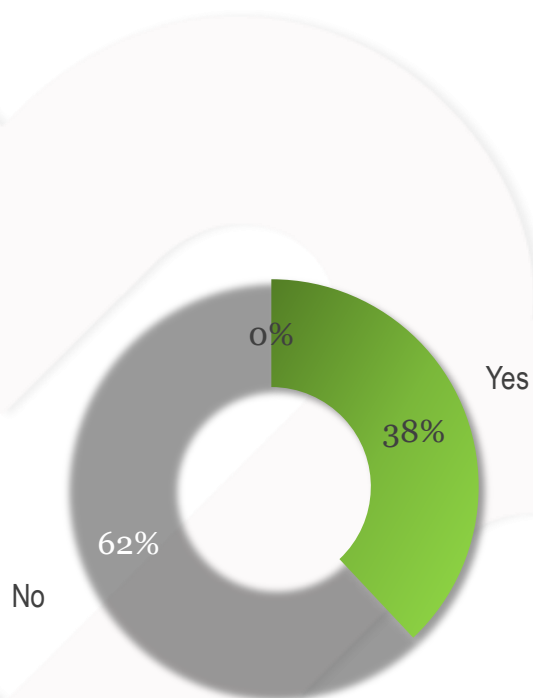
"No signs to get to a specific site but when you get to the park it's great"

Awareness of the Burren's 'Geopark' status was not strong with 6 in 10 not aware. Visitor centres and the website were most prevalent in promoting the Geopark with TV and Accommodation providers also playing a part.



Base: All, n=533

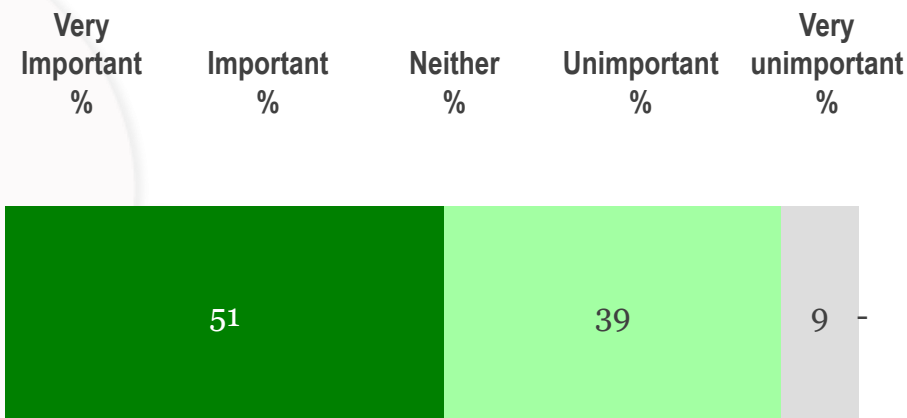
Base: All aware, n=203



The Landscape and Heritage of the Burren



Base: All, n=533

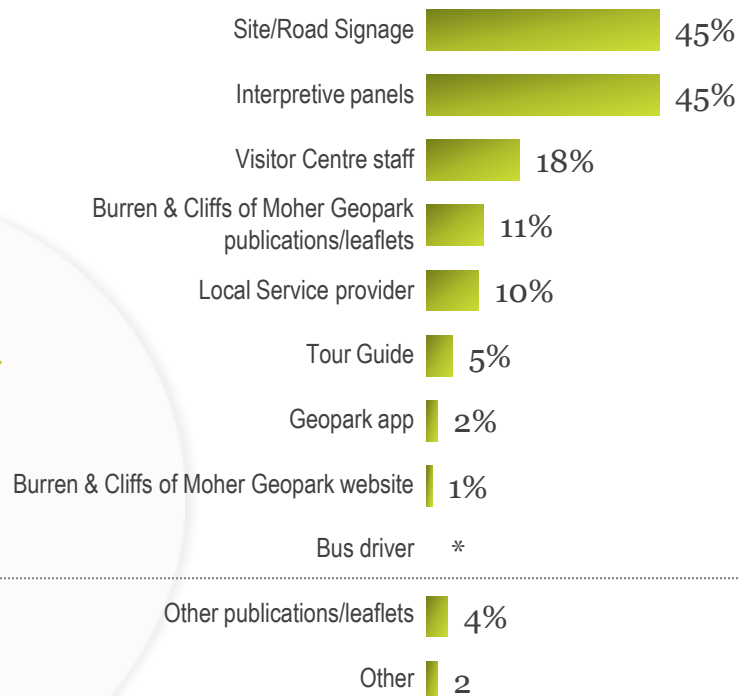
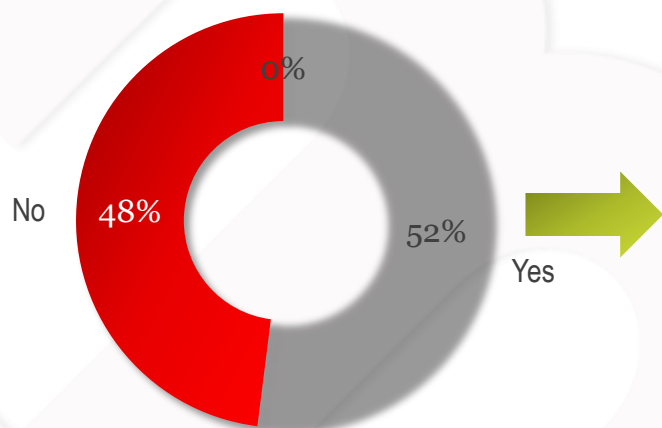


Only half had read/heard about protecting the Landscape and Heritage of the Burren, mainly from signage and interpretative panels



Base: All, n=533

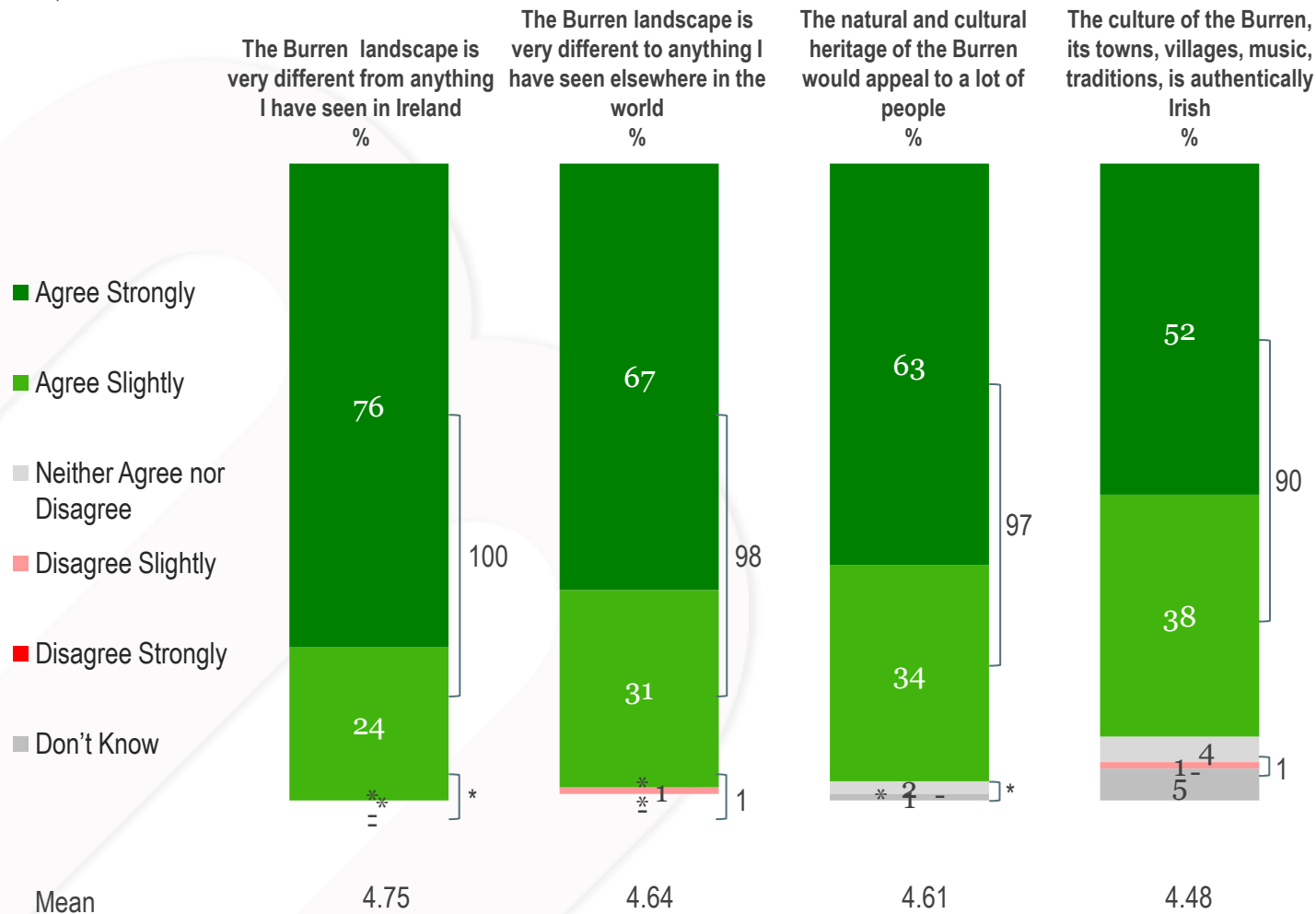
Base: All who heard other information, n=279



Rating the Burren



Base: All, n=533

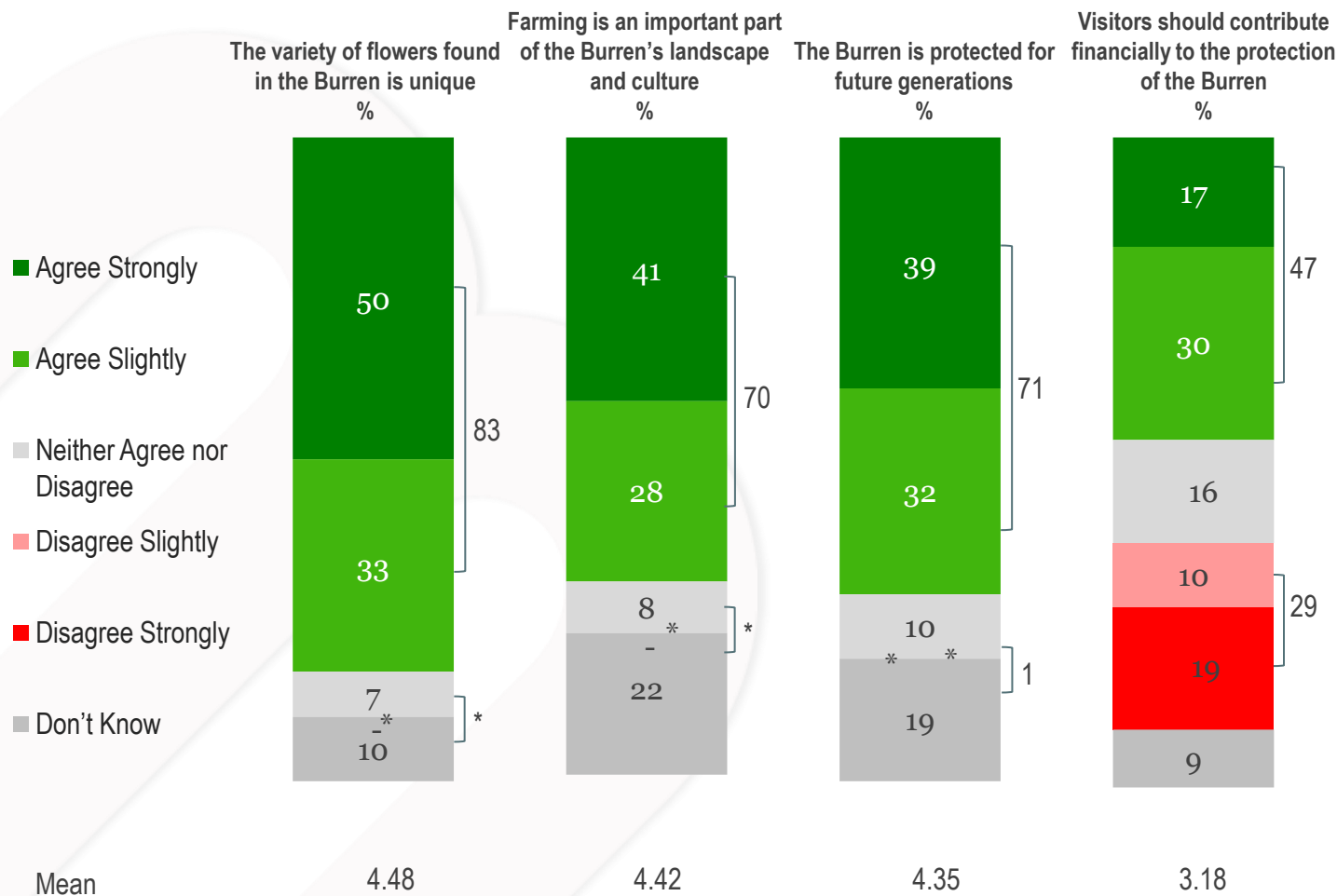


Q.22 Thinking about the Burren in particular, I am going to read out a list of statements, please tell me for each of these statements how much you agree or disagree with each of the statements.

Rating the Burren



Base: All, n=533



Q.22 Thinking about the Burren in particular, I am going to read out a list of statements, please tell me for each of these statements how much you agree or disagree with each of the statements.

Advice to other holidaymakers

Base: All, n=533

Recommend doing/seeing



NOTE: 351 people mentioned something that they would recommend seeing/doing

Not recommend doing/seeing



“Don’t Litter”

“Don’t drink too much”

“Do not park at the cliffs and don't drive fast”

“Avoid Crowds”

“Don’t walk or hike when it’s wet

“The Cliffs of Moher visitor centre. The cliffs are spectacular but the centre is too expensive”

NOTE: Only 79 people mentioned something that they would not recommend seeing/doing

The infographic displays five demographic breakdowns of the UK population, each represented by a stacked bar chart. The background features a faint map of the United Kingdom.

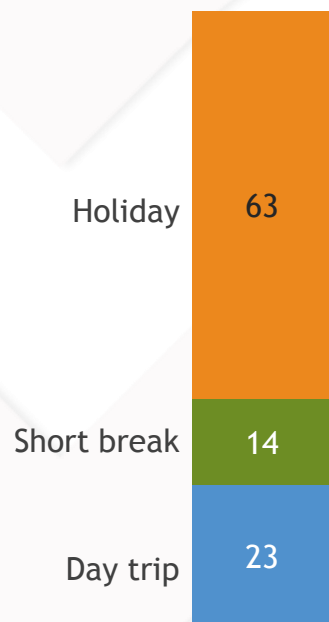
- Gender %:** A bar chart with two segments: Male (53%) in blue and Female (47%) in pink.
- Age %:** A bar chart with two segments: Under 35 (37%) in light orange and Over 35 (63%) in yellow.
- Social Class %:** A bar chart with two segments: ABC1 (76%) in grey and C2DEF (24%) in blue.
- Country %:** A bar chart with five segments: ROI (33%) in green, UK (10%) in blue, Europe (28%) in red, USA/Canada (23%) in red, and Australia/New Zealand/Other (3%) in grey.
- Marital Status %:** A bar chart with two segments: Married/Living as married (62%) in yellow and Single/Widowed/Divorced/Separated (38%) in grey.

Profile of overall sample

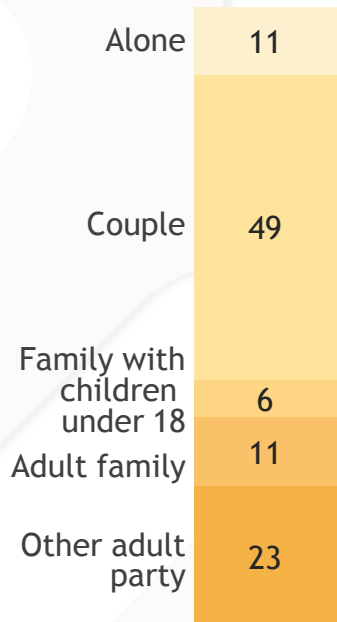
Base: All, n=533



Type of Holiday
%



Party Composition
%



Coach-based package /inclusive holiday
%



Average Daily Spend
%



Burren & Cliffs of Moher Geopark Life Programme Visitor Survey

