



BURREN TOURISM RESEARCH & VISITOR PROFILE



Visitors at Fanore. Image courtesy John Kelly, *The Clare Champion*

A market research survey on core themes undertaken with visitors, accommodation providers and visitor centre managers during the summer of 2007.

Burren Visitor Profile

The Burren is one of Europe's most unique landscapes, attracting increasing visitor numbers each year. Tourism makes a valuable contribution to the local economy but its impact can also pose a serious threat to the environment.

The Burren Connect Project has been set up to ensure the protection and sustainable use of this natural resource. Its membership includes environmental, community and tourism interests as well as statutory agencies and business operators.

The project's activities include education, training, information provision, traffic management, development of best practice in conservation, market research and exploring the feasibility of achieving European Geopark status for the Burren.

The Survey

The Burren Connect Project commenced its market research remit during the summer of 2007, with short surveys on core themes with 3 key groups – Visitors, Accommodation Providers and Visitor Centre Managers.

Sample size and details

538 persons on holiday in the Burren were surveyed at visitor centres and a range of local accommodation bases. Those on a day out or business trip were excluded from the survey. The sample size is large enough to give significant, meaningful results. In addition, 63 Accommodation Providers and 10 Visitor Centre Managers were surveyed. The following report is a summary of the findings of these 3 surveys. This and the full report will be available to download from the project website www.burrenconnect.ie which is currently being developed. In the meantime, a copy of the detailed report can be obtained by contacting the Burren Connect project office at info@burren.ie or telephone 065 7072295.

Burren Connect acknowledges the assistance of Elaine Cleary, Sustainable Rural Development student at Tipperary Institute, in the development and execution of the survey research and Clare County Council Research Department in analysing the survey findings and producing illustrative graphs.



Cruinniú na mBád "Gathering of the boats" festival, Kinvara.
Image courtesy John Kelly, Clare Champion

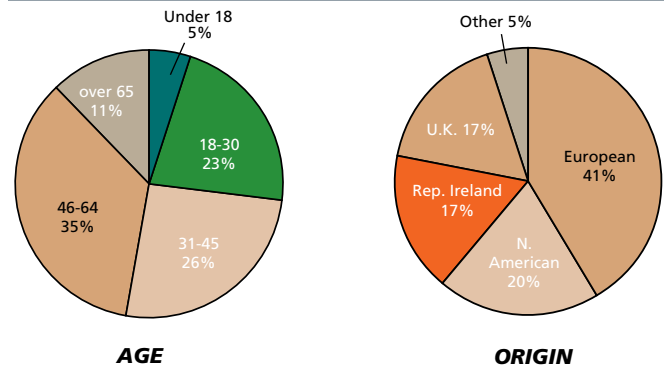
Survey Objective

The objective of these surveys is to develop a profile of visitors and assess their experience of the Burren so that information can be targeted more effectively, and sustainable services and activities can be developed, based on real visitor demand.

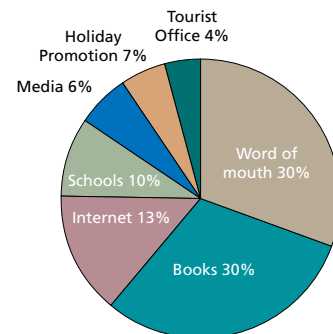
A summary of the key findings is presented in this document – how visitors hear about the Burren, how they get here, what they do here, what they would like to do more of, and most importantly, if their visit met their expectations and if they would like to return. Visitors' knowledge of the fragile nature of the Burren environment was examined, as well as their awareness of the impacts of certain practices such as picking flowers or removing stones.

VISITOR SURVEY

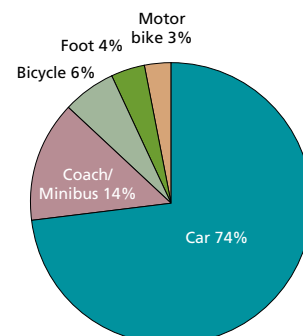
Survey sample: Age and origin of respondents



How did visitors hear about the Burren?

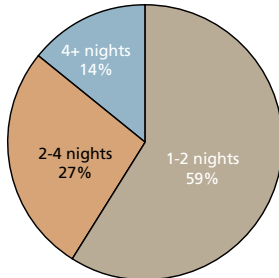


Transport - how did they get here?



How long do visitors stay in the Burren?

63 accommodation providers were surveyed (almost three quarters of these were Bed & Breakfast providers, and the remainder were mostly self-catering, hostels, hotels and campsites). Visits to these premises tend to be very short. The majority of visitors stay less than 3 nights and only 1 in 7 stay 4 nights or more.



Activities

What activities have visitors already taken part in? What activities are they interested in and what are they not so interested in?

Activity	Already Visited	Would like to visit	Not interested
Interpretative Centres	62%	22%	16%
Archaeological Monuments	55%	37%	8%
Local Cultural Events	39%	50%	11%
Guided Tours	35%	37%	28%
Local Produce	35%	44%	21%
Walking Routes	26%	52%	22%
Water based activities	18%	50%	32%
Nature Watching	17%	57%	26%
Cycle Routes	12%	34%	54%

Based on these results, there is an opportunity to develop further activities in the Burren, in particular cultural events, walks, water based activities and nature watching.

Visits to visitor / interpretative centres and archaeological monuments were the most popular activities amongst the group surveyed, but it must be borne in mind that many of the interviews were conducted at these sites.

As well as Visitors, Accommodation Providers and Visitor Centre Managers were surveyed for their views on the type of activities that visitors want. Accommodation Providers believe that demand is highest for walking routes, visiting archaeological monuments, cycling routes, cultural events, and interpretive centres. Visitor Centre Managers report that demand is highest for visiting Visitor Centres and attending cultural events. Overall, there is considerable unsatisfied demand for nature watching, water-based activities, local cultural events and walking routes.



Burren Ramble, Caher Valley, Fanore. Image courtesy John Kelly, Clare Champion



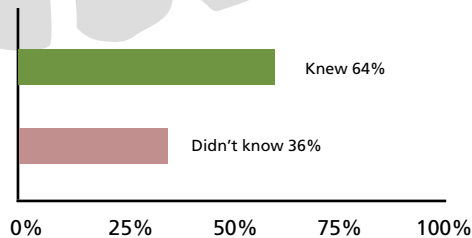
Visitors walking The Burren Way . Image courtesy Shannon Development

When examined together, the length of visitor stay and the demand for activities suggest there is considerable scope to increase overall time spent by visitors in the area. Many visitors expressed a desire to engage in more activities than they actually undertook on their holiday, although these wishes were not tested against issues of price point, practicality, weather conditions etc. However as less than 1 in 3 stay entirely in the Burren, and only 14% stay more than 4 nights, it would be fair to conclude that there is significant unsatisfied demand for the identified activities. This suggests that there is strong potential to retain visitors longer through increased accessibility and availability of such activities.

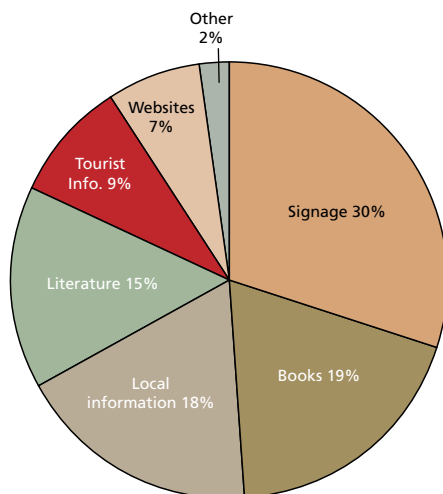
The Environment

What do visitors know about the Burren environment?

64% of those surveyed knew that the Burren is protected under legislation.



If they know about legislative protection how did they learn this?



How do they view activities that impact on the Burren environment?

Visitors were asked to rate the impact (high / medium / low / none) of removing stones, picking flowers or building mini-dolmens, on the environment.

While 64% of visitors surveyed are aware of legislative protection, only one third of visitors have the necessary knowledge to act accordingly. Therefore further education and awareness is necessary in this area.

The responses of this group and all other visitors were analysed separately to explore if their profile is distinct in other respects. The variation between the two groups on other questions is not significant.

A key learning that emerges is that information on sustainable visitor behaviour must be targeted especially at younger visitors, continental Europeans and those who do not engage in active outdoor pursuits.

Satisfaction Rates

96% of the sample agreed that their holiday had met their expectations. 53% would return for the scenery and the landscape, 35% said they would like to see more and 12% would come back for activities or relaxation. Of those not wishing to return, distance from home country and expense were cited as the main reasons for this. 32% of interviewees were on a return visit, and up to 88% stated that they would like to return.

Future for Ecotourism

97% of Accommodation Providers and 80% of Visitor Centre Managers believe that the Burren should be developed and promoted as an ecotourism location, including the development of a brand to identify the Burren as an ecotourism destination. Almost all believe this would have a potentially positive economic impact on the area. 60% of Accommodation Providers said they would be interested in achieving internationally recognised accreditation as an ecotourism provider (this question was not asked of Visitor Centre Managers).

The Future

Going forward we will be responding to the high level of interest in developing the Burren as an ecotourism destination by organising workshops to develop a collective strategy on ecotourism; adopting appropriate accreditation that is nationally and internationally recognised, and organising training programmes to assist businesses in achieving this accreditation. Accredited ecotourism businesses will not only attract visitors interested in longer-stay activity-style holidays, they will also be key players in the environmental protection and sustainable economic development of the Burren.

The Burren Connect Project team plan to continue their research in order to establish more clearly economic, environmental and social impacts of tourism and also to identify existing and potential markets and segments. This information will be used to identify product gaps and visitor requirements. Results of ongoing surveys will be published in a similar format to this one and distributed locally in North Clare and South Galway. These results will also be available to download from the project website which is currently being developed.

Burren Connect Project Contact Details:

**Carol Gleeson, Project Manager, Email: cgleeson@burren.ie;
Tel: +335 65 7072296**