

# Be Careful What You Wish For When Tourism Growth Exceeds Capacity

Katherine Webster - Kittiwake Solutions



# Introduction

- ▶ I spent the last 12 years leading the Cliffs of Moher Visitor Experience
  - ▶ From construction stage through to opening in 2007 & for 10 years of operation up to end of September 2017
  - ▶ Tripled turnover and grew spend per head by 61%
  - ▶ Over 150 direct jobs in August 2017 with significant local economic impact
  - ▶ Multi-award winning operation with consistently high visitor satisfaction ratings
  - ▶ Over 1.4m visitors in 2016 with 2017 expected to exceed 1.5m
    - ▶ Over 36% of Cliffs visitors overnighting in Clare & over 52% visiting other attractions

# Ireland's Top 10 tourist attractions - as chosen by you!

Reader Travel Awards 2017



2 Q

Cliffs of Moher. Photo: Deposit



Pól Ó Conghaile  

January 14 2017 6:00 AM



What's your favourite big hit, hidden gem, coastal attraction or city museum? Our readers have voted!

## Winner: The Cliffs of Moher

"Just stunning," was one of your descriptions of the iconic Cliffs of Moher, voted Ireland's Top Tourist Attraction by our readers for 2017.



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    - ▶ Over 36% of Cliffs visitors overnighting in Clare & over 52% visiting other attractions
- ▶ Over 20 years leadership experience in tourism & travel sector
- ▶ Currently setting up Kittiwake Solutions
  - ▶ Visitor management and attraction development for the visitor attraction sector
  - ▶ Specialising in solving the operational challenges facing visitor attractions
  - ▶ Focussing on sustainability, quality & delivery of a world class visitor experience
  - ▶ Launching in January 2018

# ‘Overtourism’ - global manifestation

- ▶ Capacity issues are hitting the headlines around the world
- ▶ At Dromoland in 2015 I spoke of ‘The Battle for Barcelona’ & the “Veniceland” phenomenon



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- ▶ At Dromoland in 2015 I spoke of ‘The Battle for Barcelona’ & the “Veniceland” phenomenon
- ▶ Dubrovnik - webcams & a numbers cap within the old city walls
- ▶ Anti-social behaviour in the Balearics, Rome & Reykjavik
- ▶ Tourist taxes in Paris, Amsterdam, Frankfurt, Hull???
- ▶ Iceland facing unprecedented visitor number growth
- ▶ AirBnB - housing displacement & affordability
- ▶ World Travel Market Nov 2017
  - ▶ UNWTO Ministers Summit ‘Overtourism; growth is not the enemy - it is how we manage it.’

# Has ‘Overtourism’ reached Ireland?

- ▶ Slea Head & Molls Gap traffic jams

# Calls for traffic lights or one-way system to be introduced on Slea Head Drive

By [radiokerrynews](#) - 20th April 2017



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- ▶ Dark Hedges congestion & environmental concerns

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## Game of Thrones: Traffic banned from Dark Hedges road

10 October 2017 | Northern Ireland |



# Has ‘Overtourism’ reached Ireland?

- ▶ Slea Head & Molls Gap traffic jams
- ▶ Dark Hedges congestion & environmental concerns
- ▶ Dublin accommodation issues
- ▶ Anti-social behaviour - Temple Bar, Kilkenny, Shop Street
- ▶ Regional imbalance
  - ▶ Dublin accounts for over 59% of all tourism GDP to Ireland - *WTTC City Travel & Tourism Impact report 2017*
  - ▶ 2 Wild Atlantic Ways - divide at Galway
- ▶ AirBnB - the cause of the housing crisis



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'No room at the inn' for tourism workers

Tuesday 14 November 2017

News Irish News

# How Airbnb is 'breaking up communities' nationwide

Residents say they feel like victims in their own homes due to the increase in short-term holiday lets, writes Philip Ryan



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Ireland > Irish News

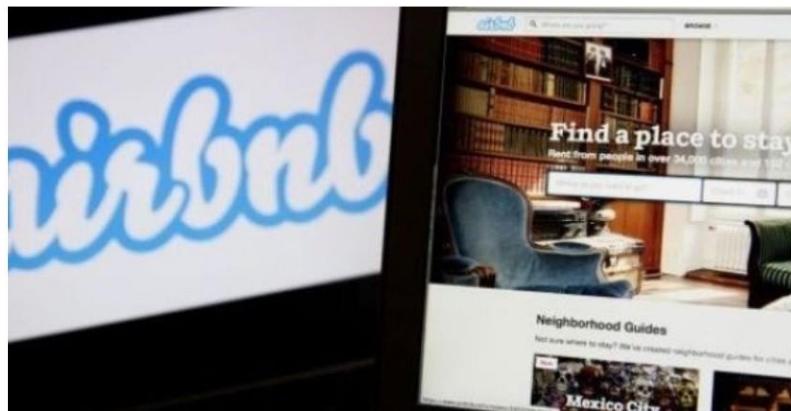


## Airbnb agreement will not solve housing crisis, says committee

Calls for new laws as fears grow that short-term lettings are squeezing renters out of city centre

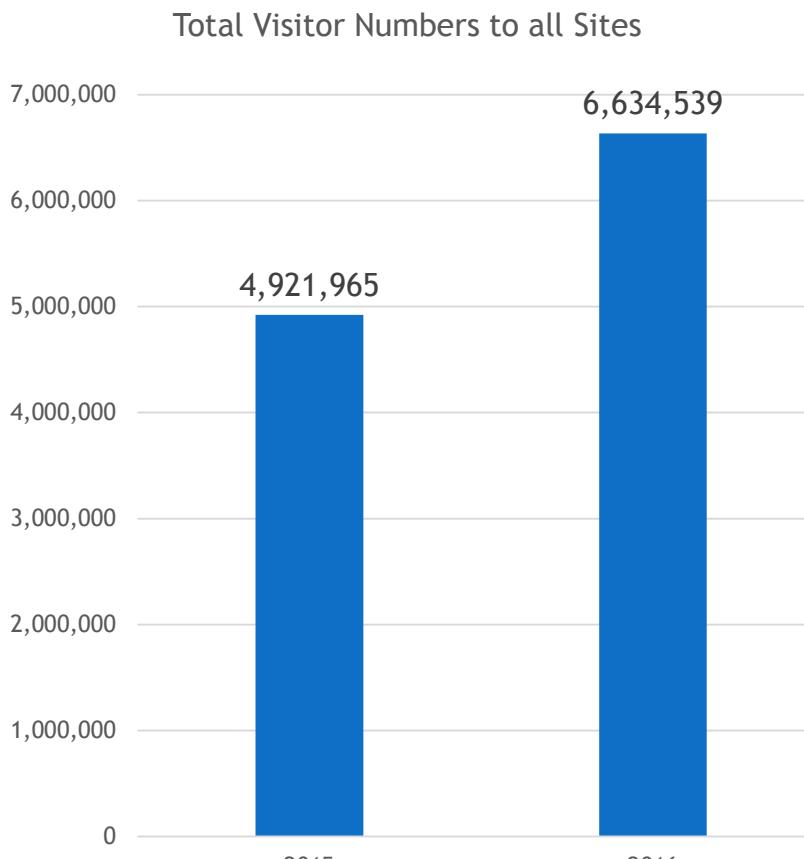
© Fri, Oct 6, 2017, 10:41

Ronan McGreevy



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  - ▶ 2 Wild Atlantic Ways - divide at Galway
- ▶ AirBnB - the cause of the housing crisis
- ▶ OPW sites growth in visitor numbers with resultant challenges
  - ▶ 4.9m visitors in 2015 increased to 6.6m in 2016



Source: [www.opw.ie](http://www.opw.ie)

## OPW warning about heavy traffic around Glendalough



1 Q

*The OPW are warning of traffic congestion in and around Glendalough*

# Has ‘Overtourism’ reached Ireland

- ▶ Cliffs of Moher capacity challenges
  - ▶ Health & Safety & Operational difficulties
  - ▶ Quality of the visitor experience
  - ▶ Environmental impacts
  - ▶ Community & local area impacts
  - ▶ Economic imbalance

# Heritage sites: our tourism industry must manage the congestion

There is an onus on visitors to choose carefully where – and when – they visit



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- ▶ Doolin congestion & day tour impact - Fisherstreet & Doolin Pier



August 2014:

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

80  
km/h

26 AUGUST 2014 13:58

# Has ‘Overtourism’ reached Ireland

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- ▶ Doolin congestion & day tour impact - Fisherstreet & Doolin Pier
- ▶ Burren & Cliffs of Moher Geopark - impact on free sites
  - ▶ Poulnabrone
  - ▶ Ballyryan
  - ▶ Corcomroe Abbey



# Is this inevitable?

- ▶ 39% growth in overseas visitor numbers to Ireland 2012-2016
- ▶ 57% growth in out of state visitor revenue in same period
- ▶ 282,000 jobs in tourism in 2017 *Minister Brendan Griffin WTM*
- ▶ Do we just take the bad with the good & consider acceptable some negative impacts as the price of the benefits?
- ▶ Or are we on a potential slippery slope?
- ▶ Tourism & the travel industry
  - ▶ “is essentially the renting out for short-term lets, of other people’s environments, whether that is a coastline, a city, a mountain range or a rainforest. These ‘products’ must be kept fresh and unsullied not just the next day, but for every tomorrow.” *Sir Colin Marshal - Chairman British Airways 1994*

# Implications

- ▶ Visitor dissatisfaction - we sell an “authentic” experience if we fail to deliver we break that contract

"Don't bother"

5 30 Aug 2017

Dianne95 (41 Reviews)  
College Station, TX

I love the Book of Kells, and illustrated manuscripts, and was very excited to see this. Well, if you actually want to see it, get a book on it. It was terribly overcrowded, the book was very hard to actually get to, and there's only one page on display. I felt very ripped off - the old library is beautiful, but you (of course) don't get to touch any of the books. Go see the Chester Beatty museum if you love old manuscripts, many more of them there from cultures around the world, and you're not fighting the scrum.

## PLACES YOU'LL SEE

### 30 Most Disappointing Travel Destinations on Earth

But the most common type of tourist letdowns are the ones deliberately built on hype. In a way you can't blame the locals; everybody's got to make a living. Even so, it can be disappointing to find out there really isn't much more to a tourist trap than that it's a place a lot of tourists go to and leave money and you've fallen for it.

#### 1) The Blarney Stone, Ireland



tripadvisor  
IRELAND

County Offaly ▾

About County Offaly Hotels Holiday Rentals Restaurants Things to do Flights ...

Europe > Ireland > Province of Leinster > County Offaly > County Offaly - Things to Do > Clonmacnoise

Say hello to more...  
discoveries and luxuries  
in Northern Ireland



Tell me  
discover  
nothe  
com

"Closed at 5.15p.m. with 80 visitors waiting to get in."

5 Review of Clonmacnoise



Clonmacnoise

Shannonbridge, Ireland +353 906 74195 Website

Ranked #1 of 45  
Offaly

IrishCentral.

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Does Dublin look more like Disney Land than a functioning capital city?

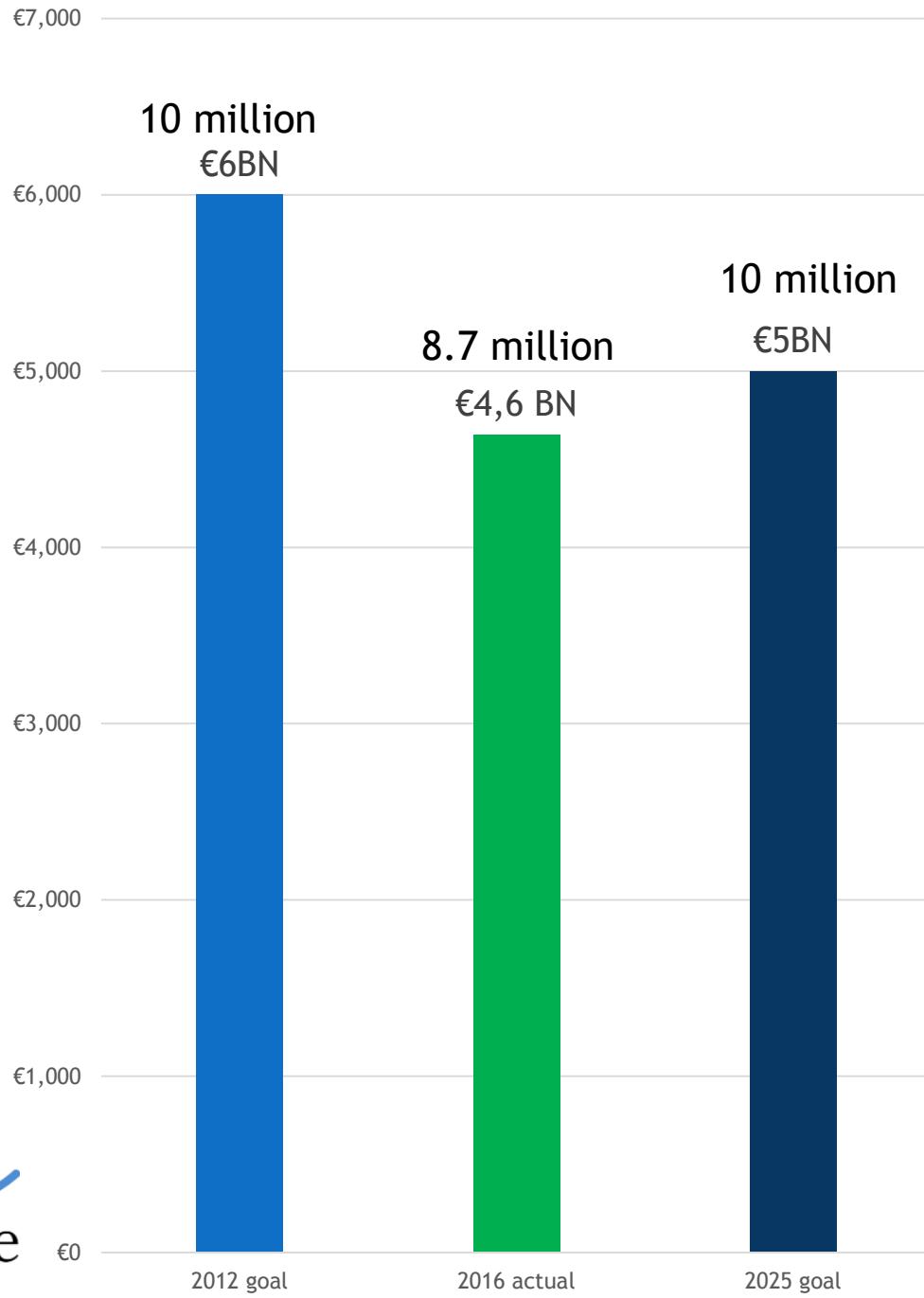
We need to talk about tourism. Walking down Grafton Street in Dublin last week, we were accosted by a guy in a full leprechaun outfit -- silver buckled dancing shoes, green jacket, and breeches, a necklace of gold coins, red beard, red curly wig, leprechaun hat, the works. He had clearly mistaken us for tourists.

# Implications

- ▶ Visitor dissatisfaction - we sell an “authentic” experience if we fail to deliver we break that contract
- ▶ Local community impacts - conflict between those engaged in tourism and those not and between different types of tourism provider
- ▶ Social impacts - housing shortages, regional imbalance, anti-social behaviour
- ▶ Drive to the bottom - bucket list tourism - reduction in overnight stays, in spend per head, working harder for less return
- ▶ Exponential growth of the day tour business model out of Dublin and cities
- ▶ Not all tourism is desirable

# Why are we where we are now

- ▶ Ireland is but a short time out of recession - cyclical nature of tourism
- ▶ However, weakness in policies has also contributed
- ▶ 2003 New Horizons for Irish Tourism - established goals for 2012
  - ▶ 10 million overseas visitors & €6 billion in overseas spend
- ▶ 2015 People Place & Policy (coloured by recession) - goals for 2025
  - ▶ 10 million overseas visitors & €5 billion in overseas spend
  - ▶ 250,000 employed in tourism sector
  - ▶ Goals already almost outstripped



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- ▶ Agency KPIs have focused on counting heads
- ▶ Failte Ireland segmentation focuses on three key target markets
  - ▶ Great Escapers, Culturally Curious, Social Energisers



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  - ▶ Social Energisers = pub crawl, hen & stag, short stay demographic

# Why are we where we are now

- ▶ Over reliance on the British market
  - ▶ Spend per head fell by 3% from 2012 to 2016
  - ▶ Every other market (including Northern Ireland) spend increased - 15.5%(20%)
  - ▶ Short stay, lower spend, Social Energiser demographic

## Spend per head by market

€1,200.00

€1,000.00

€800.00

€600.00

€400.00

€200.00



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- Britain
- North America
- Europe
- Rest of World
- N. Ireland

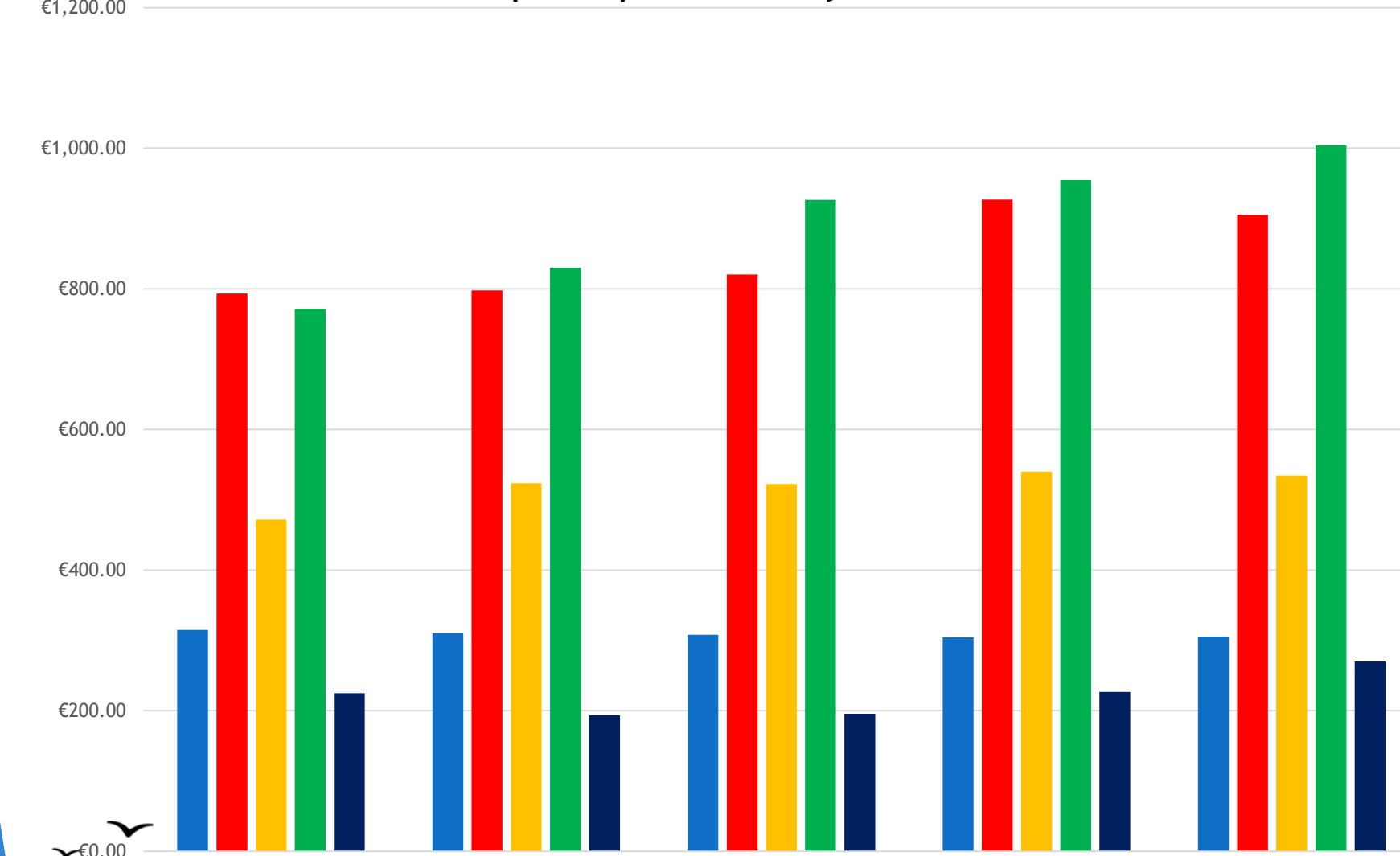
2012

2013

2014

2015

2016



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- ▶ Lack of complete data
  - ▶ CSO figures fail to capture true picture for tourism spend/employment
  - ▶ Disproportionate impact of hospitality sector
  - ▶ No Tourism Satellite Account in Ireland
- ▶ Disjointed agency approach to tourism
  - ▶ “Complex policy framework with disparate & conflicting objectives”



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  - ▶ “Complex policy framework with disparate & conflicting objectives”
  - ▶ Failte Ireland, Tourism Ireland, local authorities, Udaras, NTA, OPW, NPWS ...
- ▶ No cohesive transport policy for tourism
- ▶  Successful marketing with less successful management



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# Possible Solutions

## Demand

- ▶ Examine target markets/segments
- ▶ De-marketing
- ▶ Price based incentives/disincentives
- ▶ Seasonality
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## Supply

- ▶ Building capacity
- ▶ Timed tickets & online booking
- ▶ Capping numbers
- ▶ Regulation & compliance
- ▶ Tourism taxes???

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## Policy/Management

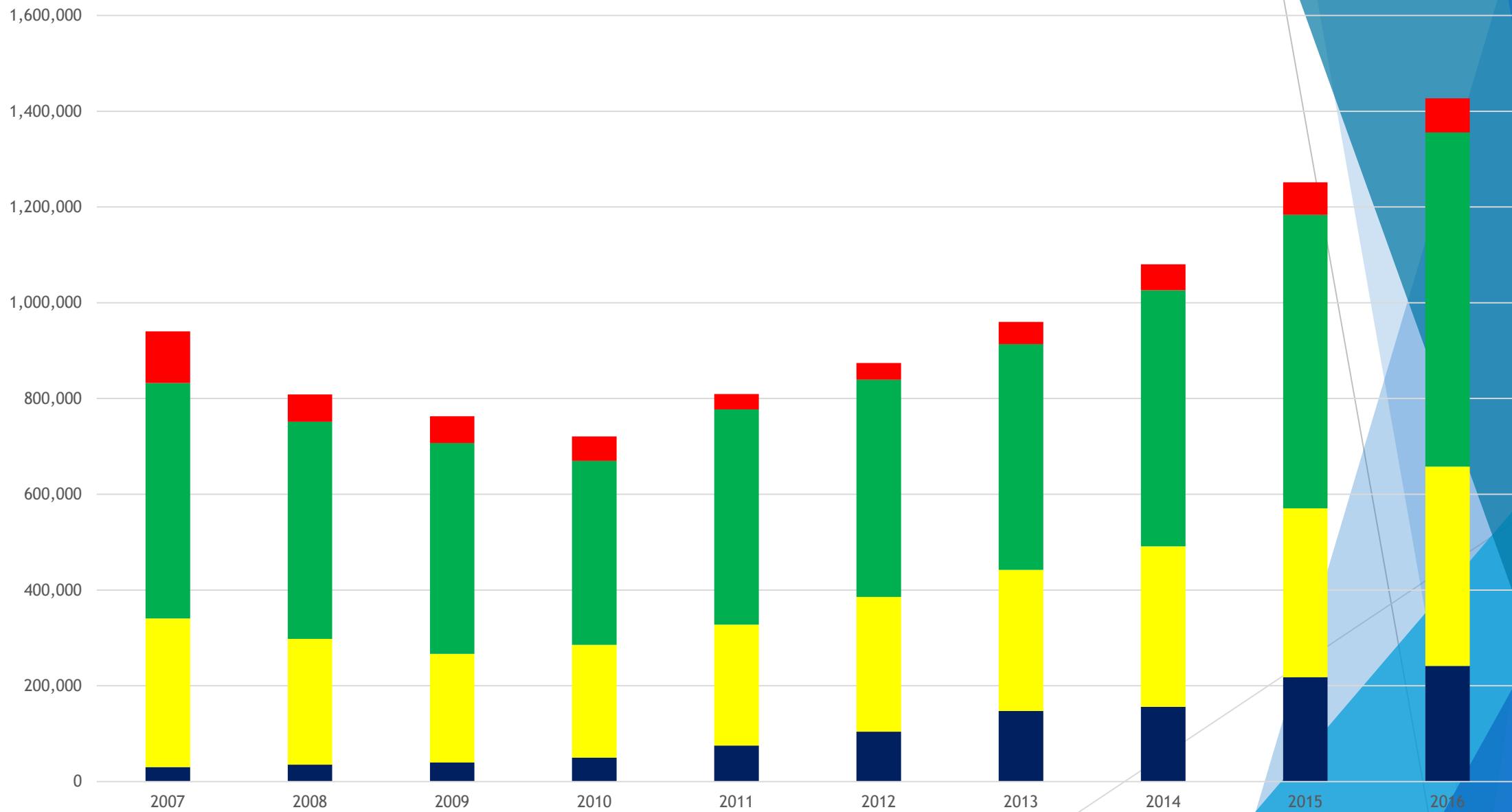
- ▶ Joined up approach between agencies - requires policy led approach
- ▶ Long term strategic approach - Failte Ireland 10 year plan
  - ▶ Changing goals to include employment, tax take and revenue
  - ▶ Requires strong data & analytics for evidence based policy - TSA

# Case Study - Burren & Cliffs of Moher Geopark

## Issues

- ▶ Cliffs of Moher is the honeypot - 1.5m+ in 2017

■ Day tours ■ Groups ■ FIT ■ Other



# Case Study - Burren & Cliffs of Moher Geopark

## Issues

- ▶ Cliffs of Moher is the honeypot - 1.5m+ in 2017
- ▶ Capacity management - hot topic since 2014 - series of initiatives
  - ▶ Driving business to off peak - price based, marketing
  - ▶ Aggressively managing coach based business
    - ▶ Liaison with NTA & no new route licences for day tour
    - ▶ Booking system for coaches & check in onsite
    - ▶ Infrastructure investment to manage coach business



Co. Clare, Ireland. T: +353 65 7

# Case Study - Burren & Cliffs of Moher Geopark

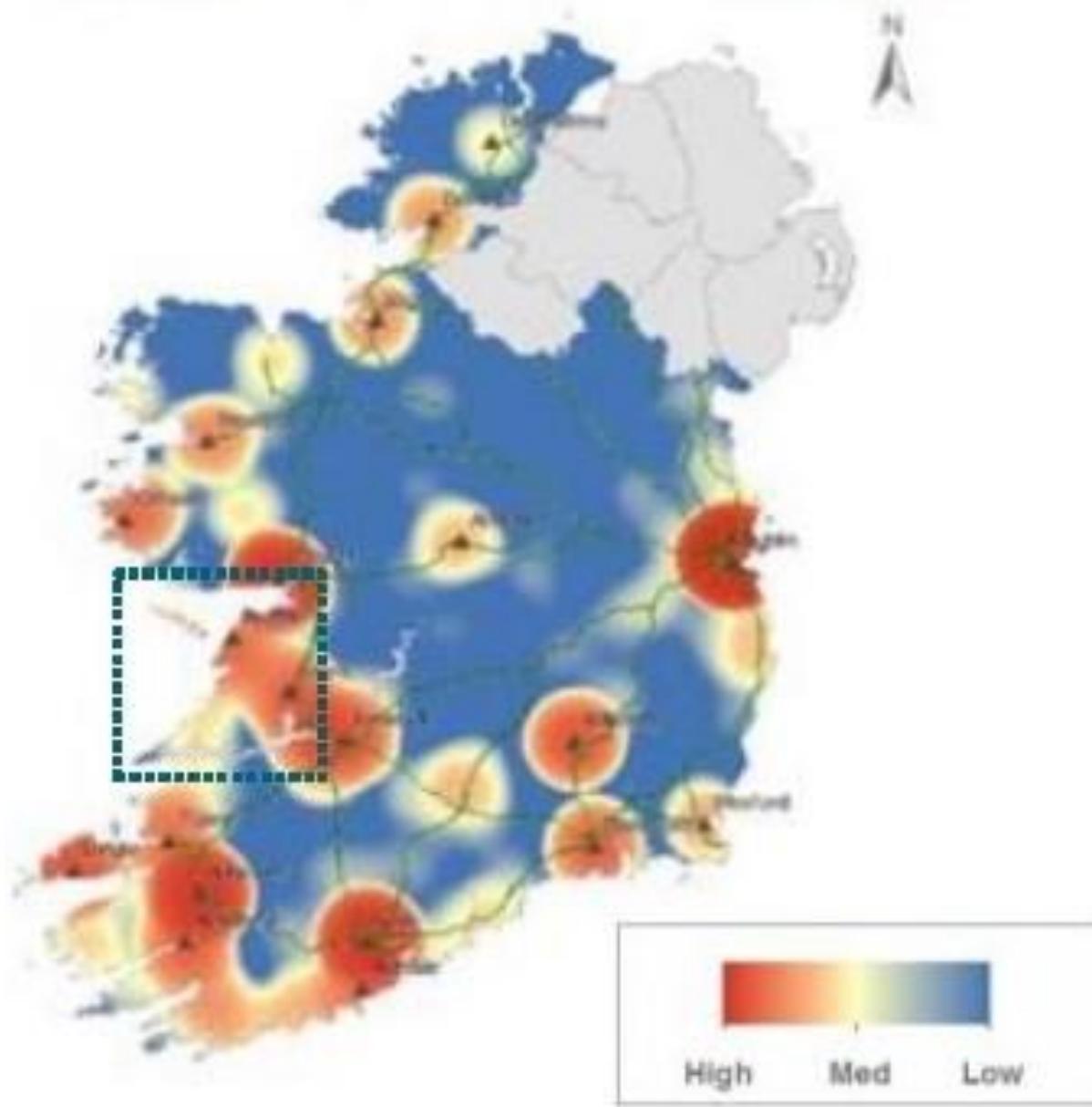
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    - ▶ Booking system for coaches & check in onsite
    - ▶ Infrastructure investment to manage coach business
  - ▶ Managing the message & advanced digital signage
  - ▶ Next steps include 10 Year Master Plan with FIT booking critical
- ▶ Cliffs of Moher Visitor Experience cannot solve the capacity impacts alone
  - ▶ Knock on numbers in Doolin & at the pier - day tours seeking alternative ways to see the Cliffs
  - ▶ Regulation compliance in management of licenced tours is insufficient

# Case Study - Burren & Cliffs of Moher Geopark

- ▶ Failte Ireland draft Visitor Experience Development Plan
  - ▶ Partnerships, connectivity of products to experience & storytelling to visitor
  - ▶ Integrated Transport Strategy required

Figure 2: Hotspot Map of Overseas Visitors Travelling for a Holiday



# Case Study - Burren & Cliffs of Moher Geopark

- ▶ Failte Ireland draft Visitor Experience Development Plan
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- ▶ Geopark LIFE project
  - ▶ Policy review towards integration of Sustainable Tourism & Conservation management in Burren & Cliffs of Moher Geopark area
  - ▶ County Development Plan identified as key policy instrument



*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.*

Buses in the Burren 2014 - A Study of Impacts and Issues  
Joe Saunders Research & Communications

*It is clear there is a major problem in relation to coach tourism in the Geopark and the wider region...Transport policy should be considered in the context of an overall strategy for tourism in County Clare...The County Development Plan is the correct mechanism to integrate sustainable tourism and conservation management.*

Professor Gabriel Cooney UCD - Reviewing Policy towards the integration of Sustainable Tourism and Conservation Management - Burren GeoparkLIFE 2017

*“I believe we have reached a level of ‘over-tourism’ at particular points of the season in this part of the Geopark. We need a number of agencies to work together to manage the day coach tourism business”*

Carol Gleeson Geopark Manager - Sustainability Leaders interview - Nov 2017

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  - ▶ County Development Plan identified as key policy instrument
- ▶ Marketing of the destination is not just in the control of those who manage it
  - ▶ Success breeds demand
  - ▶ Demand cannot be just be diverted elsewhere

# Conclusions

- ▶ Visitor volume is not a measure of success
- ▶ True measures - triple bottom line
  - ▶ Economic benefit - direct revenue, jobs, local spend
  - ▶ Quality of the community dividend
  - ▶ Preservation of the environmental asset
  - ▶ = better quality of visitor experience
    - ▶ *“Great places to live are great places to visit”*
- ▶ Long term approach required for long term success
- ▶ Joined up thinking between agencies and local communities
- ▶ Policy based on good data, ambitious but quality goals and a willingness to be discerning in the type of tourism we want

# Thank you