



Cliffs of Moher Visitor Experience

Visitor Numbers are Vanity

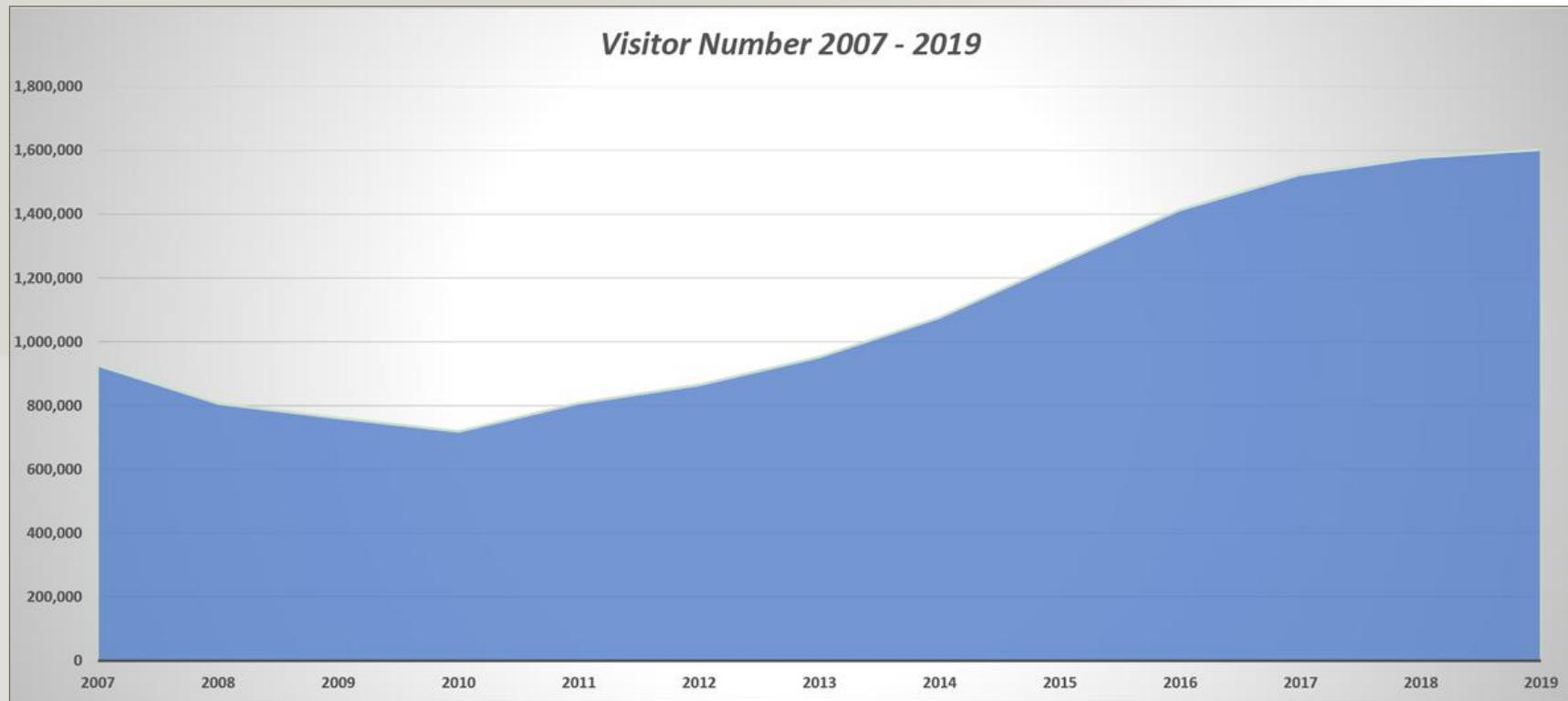
DROMOLAND POLICY CONFERENCE

NOVEMBER 2019



2019 SEASON

- Visitor Numbers 2007 - 2019



Year	2007	2008	2009	2010	2011	2012	
Visitors	927,841	808,310	762,838	720,574	809,474	866,606	
Year	2013	2014	2015	2016	2017	2018	2019
Visitors	953,933	1,077,757	1,248,420	1,415,609	1,415,609	1,580,010	1,605,000

2019 SEASON

- Visitor numbers

Cliffs of Moher Monthly Visitor Numbers 2018 v 2019



Year end prediction +1.6% 1.605,000m visitors

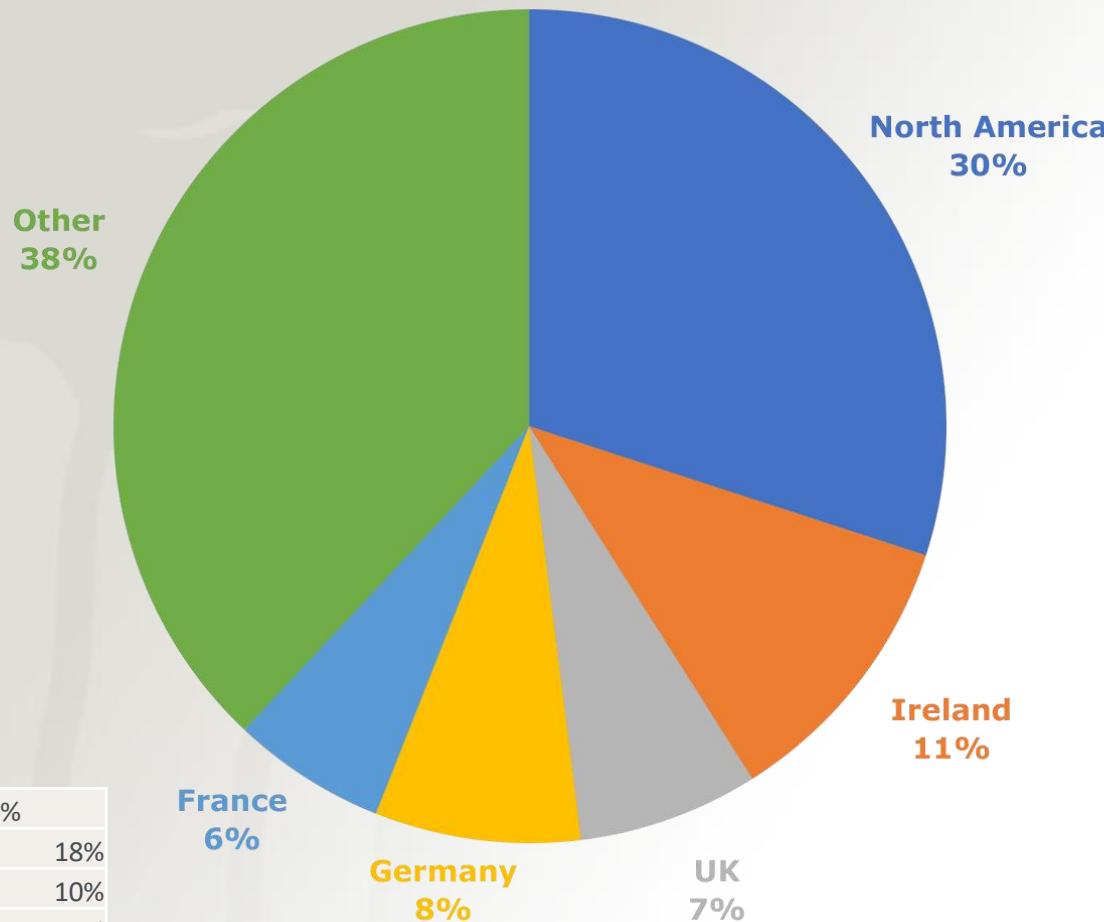
2019 SEASON

- Revenue 2007 - 2019



2019 SEASON

- Nationality Data



Breakdown of Other Market 38%	
European	18%
Asian	10%
Australia	5%
South American	5%

2019 SEASON

- Visitor Management

Visitor Spread	Group	FIT
8am – 11am	30%	14%
11am – 4pm	60%	62%
4pm – close	10%	22%

15% of all visits have moved out of 11am-4pm period

FIT online booking 10%

Day Tour 40% Group business

	FIT	Group
Visitor Split	59%	41%
Visitor Increase/ Decrease	+4%	-4%



BOOM TO BUST AND 10 YEARS ON

- 2007 New Visitor Experience Opens
- 2008 Recession
- 2010 Ash Cloud
- 2011 Shortlist New 7 Wonders Nature
- 2013 Cliffs of Moher Coastal Walk
- 2015 Signature Discovery Point on Wild Atlantic Way
- 2015 Burren & Cliffs of Moher UNESCO Geopark



- 2016 Capacity Issues Emerge
- 2017 Organisational Structure Review
- 2018 Dynamic Pricing/
Commercialise/ Professionalise
- 2018 New Coach Park Reception Building
- 2018 New Board of Directors Appointed
- 2019 Outsource Café
- 2019 O'Brien's Tower Experiential





 Book online
Save up to 50%

 Open 8am – 9pm
in May, June,
July & August



Book online
to be
guaranteed
entry

 Visit late afternoons/
early evenings &
experience
sublime
sunsets



Official Cliffs walk
shuttle bus
coming soon



Visit early morning
for peace and
tranquillity

 CLIFFS OF
MOHER

BOOM TO BUST AND 10 YEARS ON

- Employment – 45 -175 Employment 300% in 10 years
- Revenue V's Numbers – Revenue 400% in 10 years
- Managing numbers - Growth of 100% on 10 years
- Managing Capacity – 15% moved into off peak
- Managing Visitor Experience – 94% trip advisor ratings





KEY LEARNINGS

- Organisational Strategy
- Human Resource Strategy
- Customer Experience
- Visitor Management
- Capacity Management
- Innovation and Change
- Capital Investment Investment
- Aspire to be a leader
- Research
- Access changes cause disruption





Access Disruption

- 2007 - 30,000 Day Tours
750,000 transatlantic flights to Shannon
- 2019 - 375,000 Day Tours
250,000 Transatlantic flights to Shannon

Less bed nights in the region as a result.





LOOKING FORWARD



COMMENCE CLIFFS OF MOHER STRATEGY 2040

Package 1. Hinterland

Package 2. Access and Egress, Mobility management

Package 3. Existing Infrastructure



2020 AND BEYOND

- Major Capital Investment Programme
- IT & Systems integration
- Community/Outreach and Conservation
- Sustainability
- Accessibility
- Visitor Experience – Value Add
- Wider remit
- Growth Absorption
- Invest in people





THANK YOU