

COUNTY CLARE VISITOR SURVEY 2022



Insights into
Visitor Behaviour



COMHAIRLE CONTAE AN CHLÁIR
CLARE COUNTY COUNCIL



METHODOLOGY

The County Clare Visitor Survey was conducted from late April to September 2022. It was an online self-completion survey that targeted domestic and international visitors. Clare residents were not included in the survey.

To encourage online participation, prompt brochures with unique codes were distributed to visitors during their visit to Clare. Accommodations personally issued these brochures to their guests, while selected visitor attractions provided them to visitors at the point of entry. Additionally, display stands at popular visitor locations featured these survey brochures.

In total, over 370 visitors responded to the survey, representing a diverse range of solo travellers, couples, families, and friends.

Please note that the survey's findings reflect respondents' views and cannot represent the travel patterns and behaviour of all visitors to Clare.

Nevertheless, the survey provides valuable insights into visitor behaviour, preferences, and satisfaction levels.



Q: WHERE THE RESPONDING VISITORS CAME FROM..



Overseas Countries

- North America - 44% of overseas
- Europe - 31%... Germany was 9%
- Britain - 25%

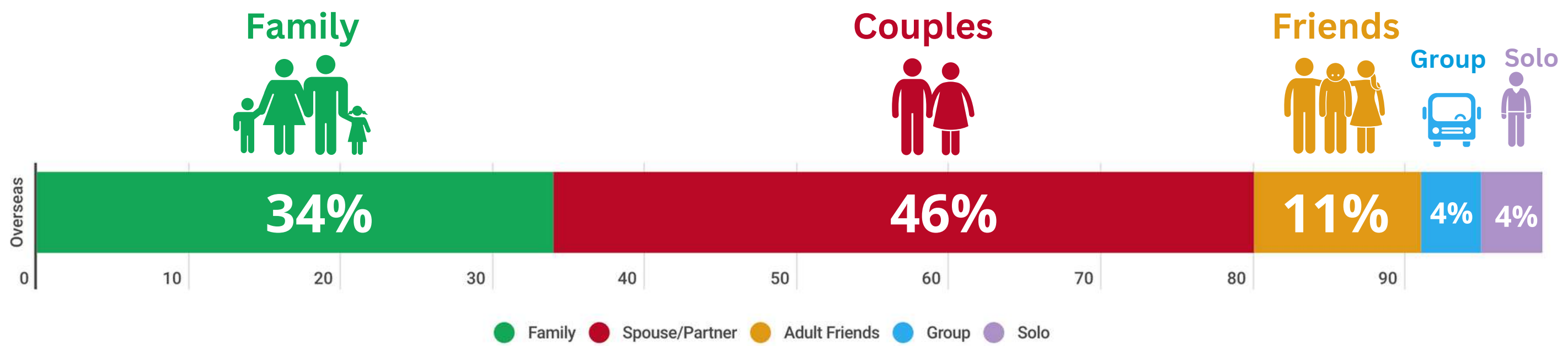
Irish Provinces

- Leinster - 47%... Dublin was 24%
- Munster - 31%
- Connacht - 16%
- Ulster - 6%

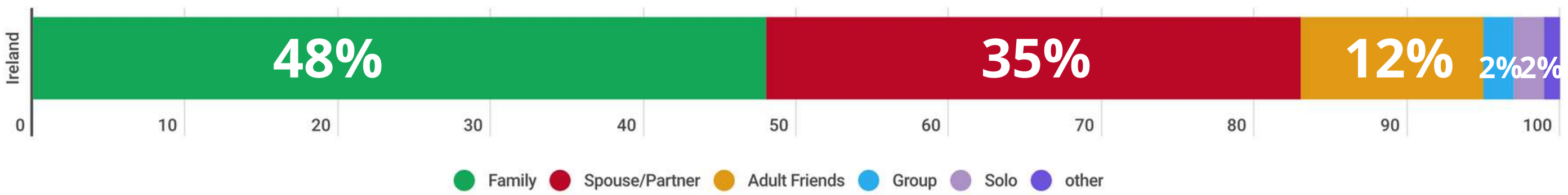
Q: WHO THEY TRAVELLED TO CLARE WITH?



Overseas Visitors



Ireland Visitors



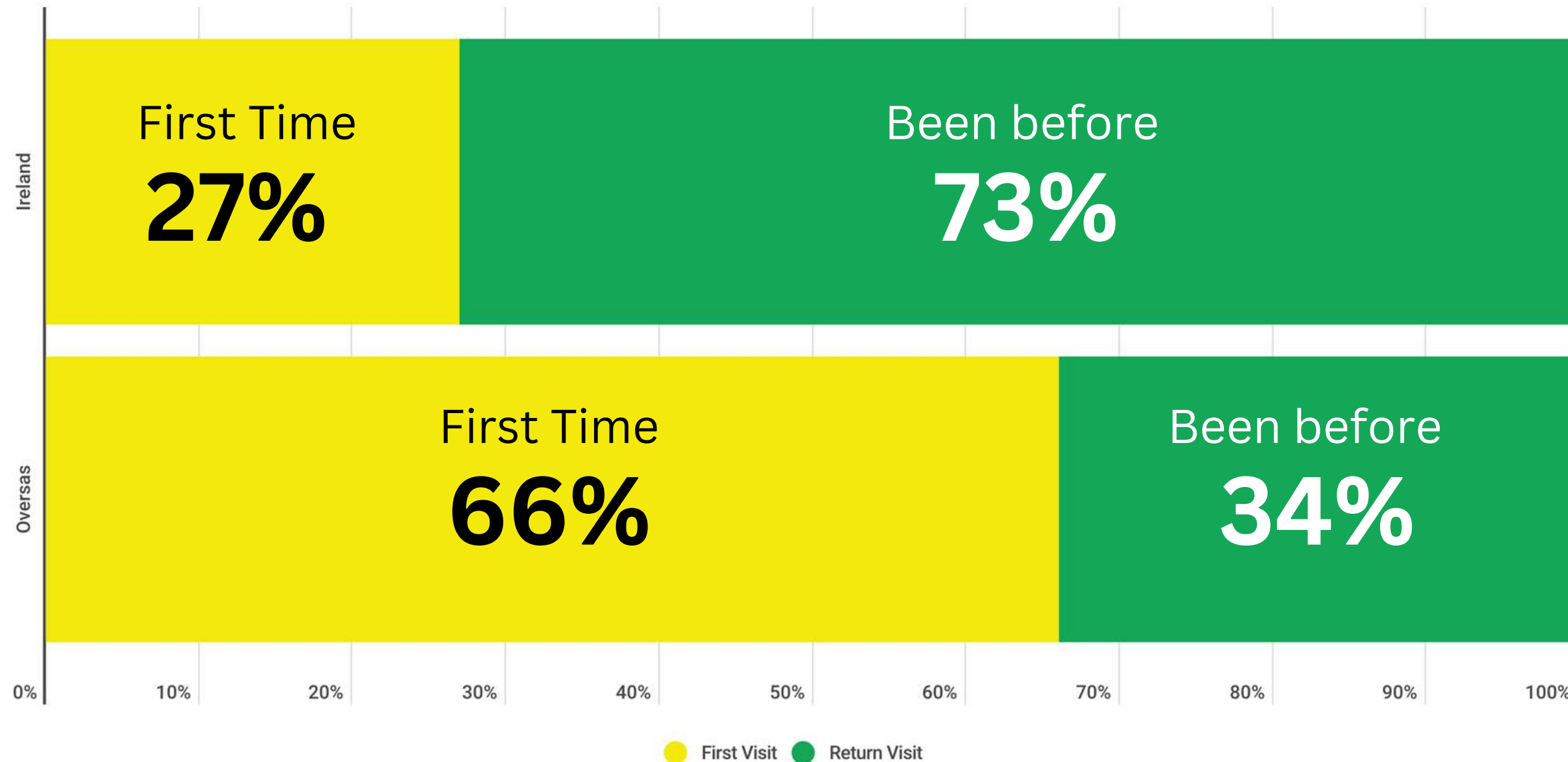
Couples were the biggest segment among overseas respondents.

Families were the biggest segment among Ireland respondents.

Note: The survey was deliberately biased toward securing the views of independent (non-group) visitors - as easier to influence in future.

Q: FIRST TIME VISITORS OR RETURNING VISITORS?

Ireland and Overseas Visitors Compared



As is to be expected, more Ireland than overseas visitors have been to Clare before.

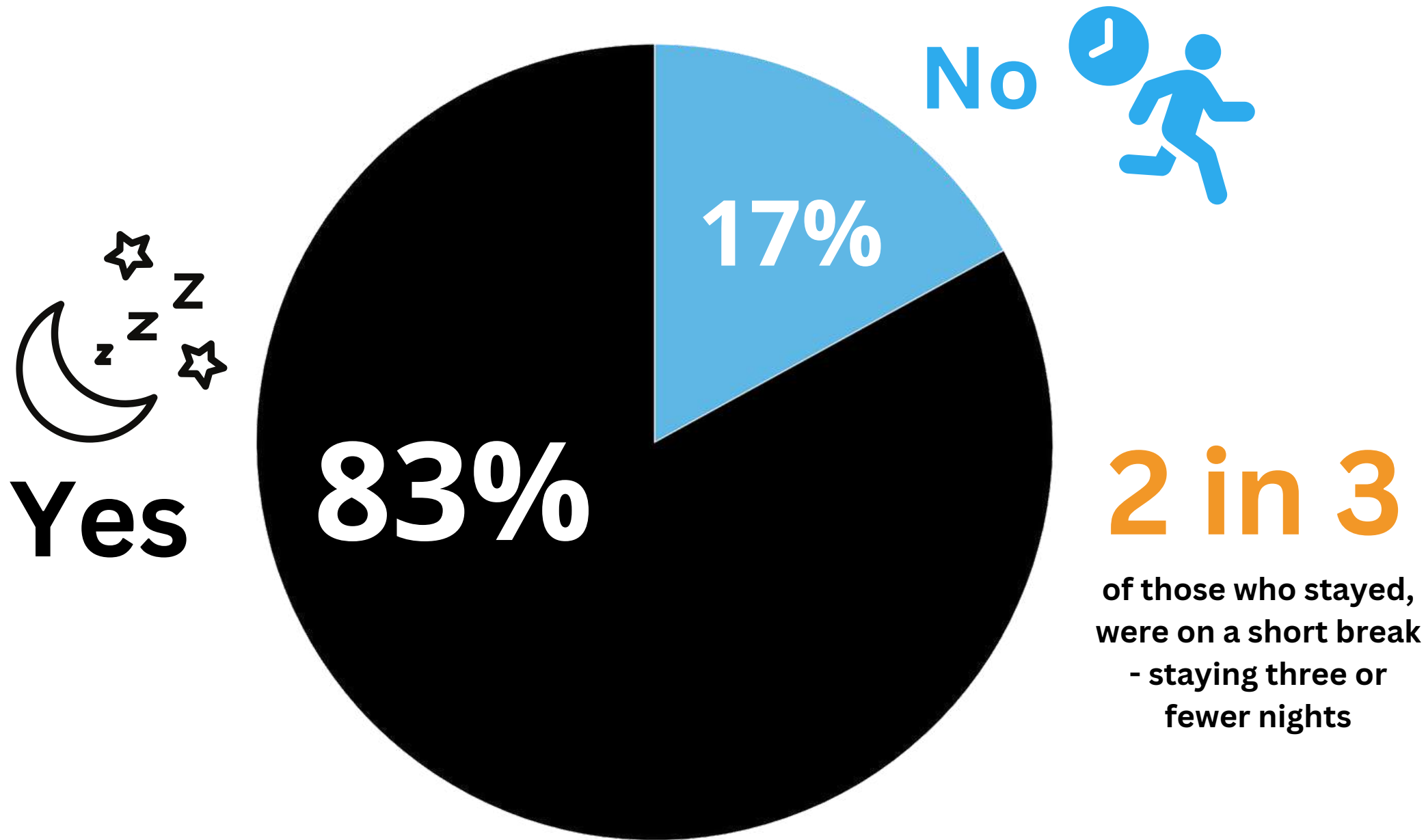


Both first timers and returning visitors generally loved Clare - with first timers scoring it just a little higher. 96% of first timers gave an "extremely satisfied or very satisfied rating"; while returning visitors gave it a 93% combined rating. Almost all others gave a 'Fairly Satisfied' rating.



Of those who have been before, 46% were here within the last year. 54% haven't been in Clare for two or more years (and 20% of returning visitors haven't been in Clare for over five years).

Q: STAYED OVERNIGHT?



- 83% of the respondents STAYED in Clare. **This positioned them well to make good judgements in feeding back about Clare.**
- 86% of Ireland visitors overnighted, and 78% of overseas visitors did so.

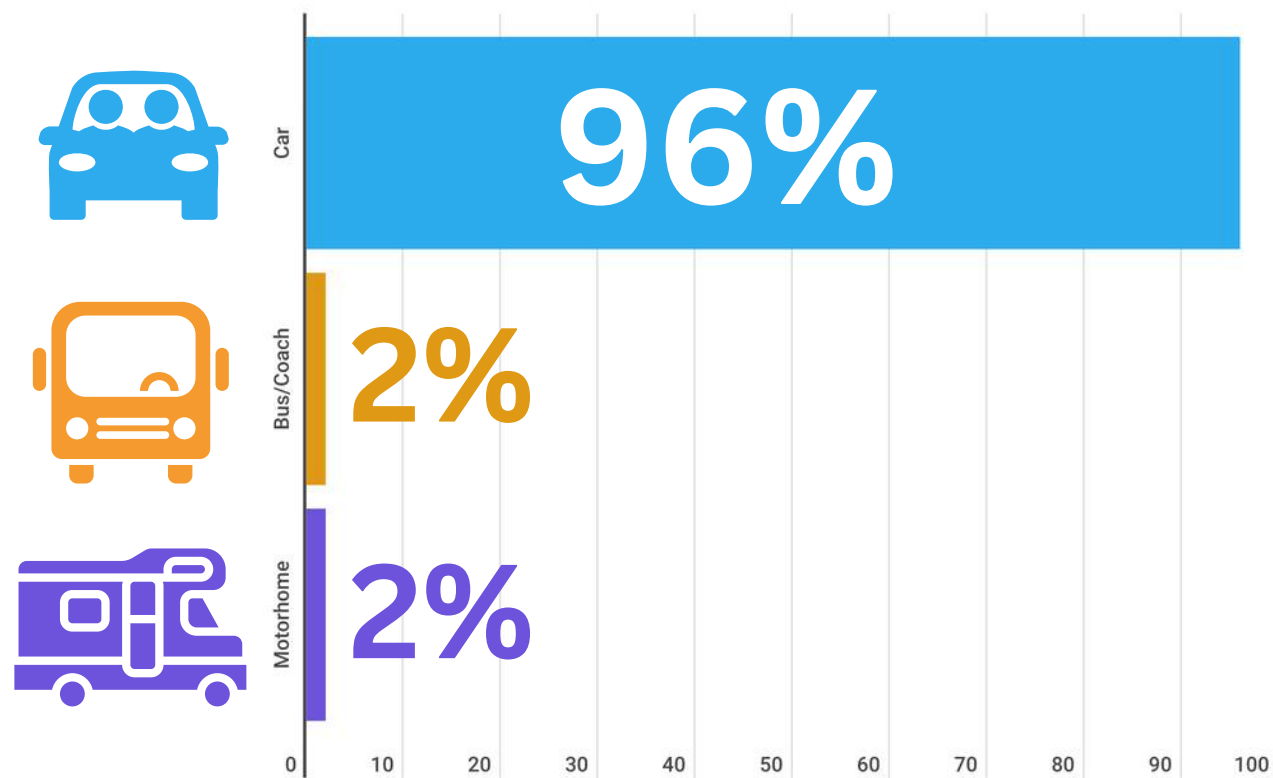
Average Stay
of those who stayed

Ireland Visitors
3.7 nights

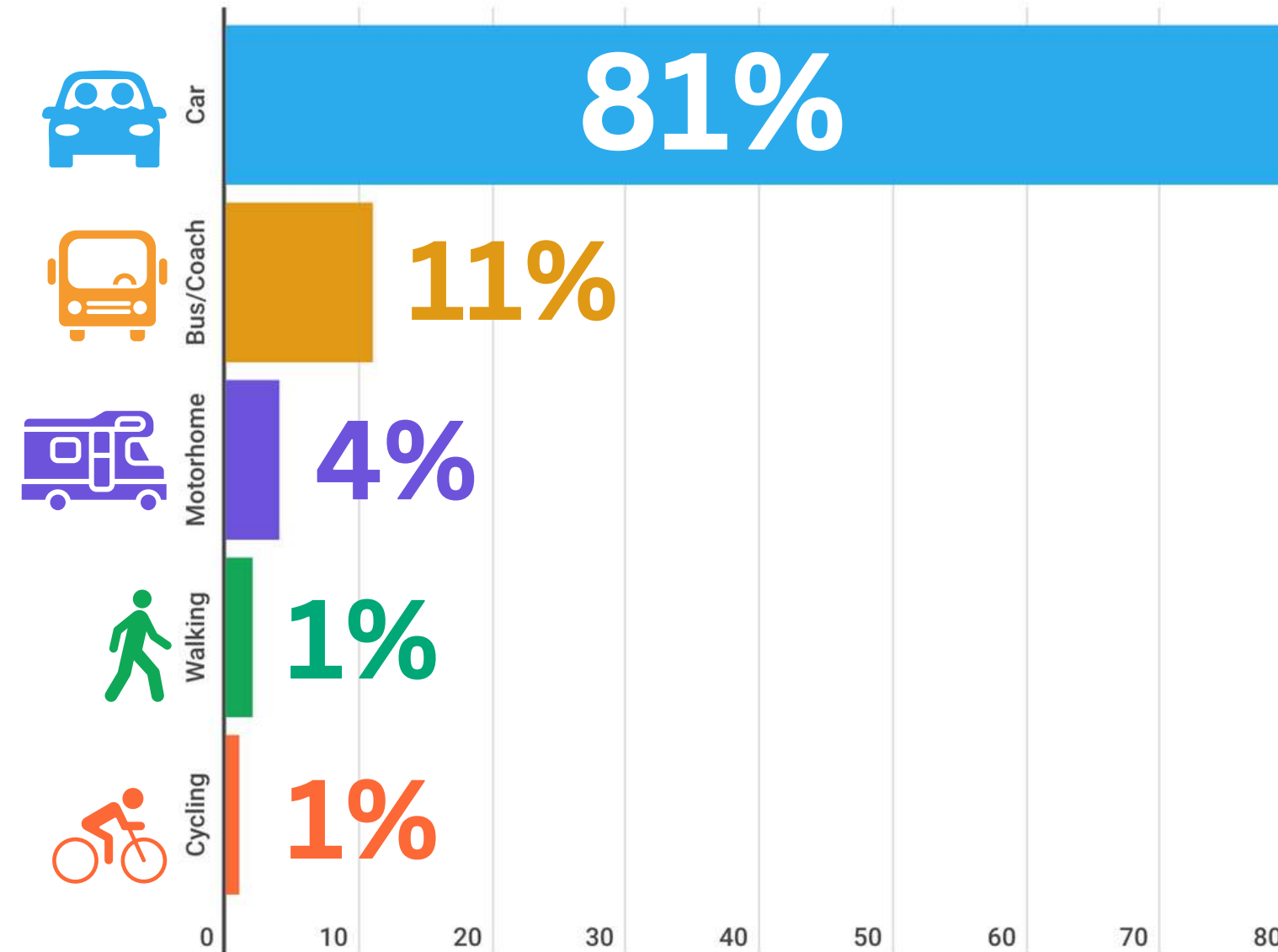
Overseas Visitors
4.9 nights

Q: PRIMARY MEANS OF GETTING AROUND CLARE?

Ireland Visitors



Overseas Visitors



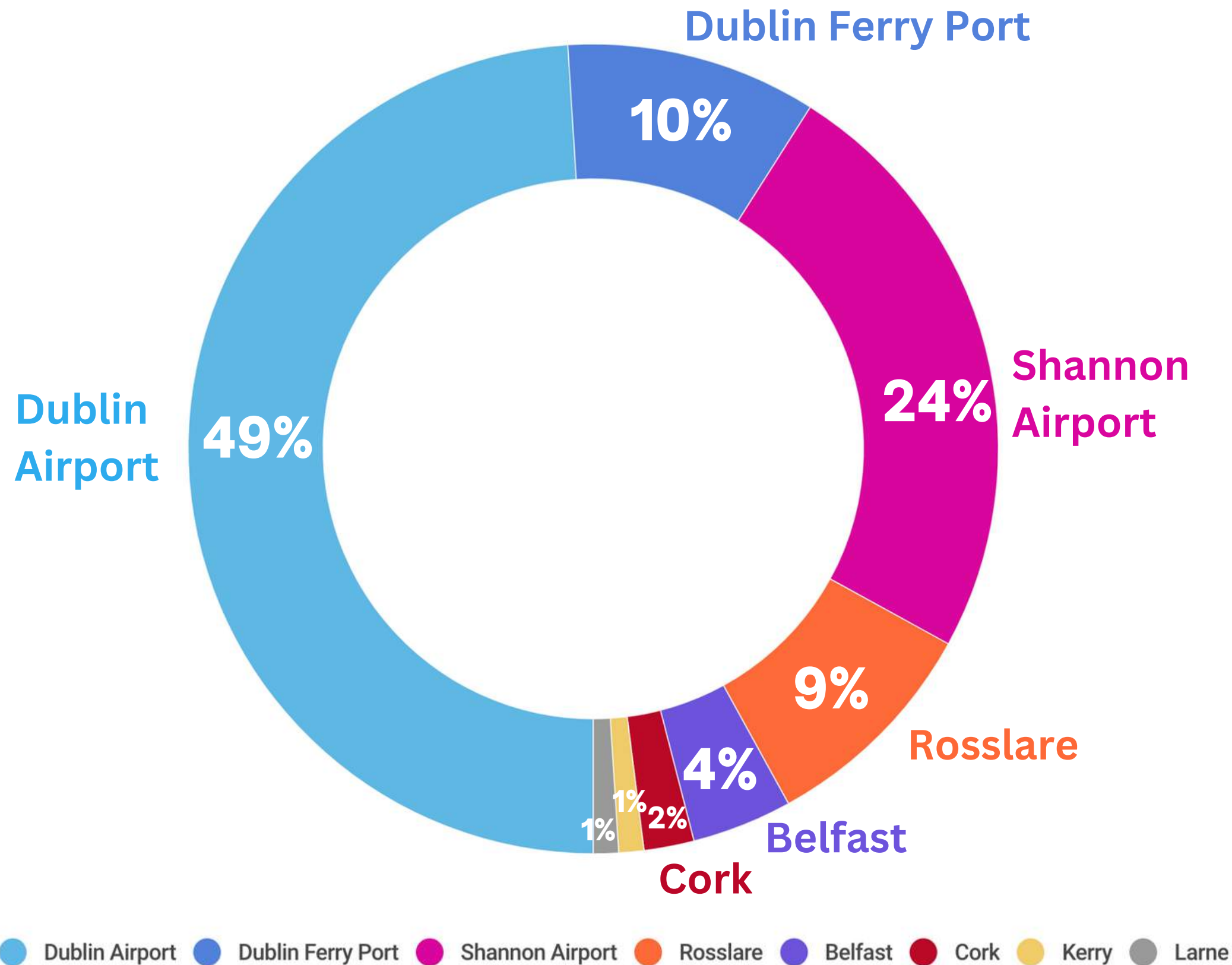
Car travel is the dominant and primary mode of transportation reported by respondents in Clare.



If travelling with a family - over 97% used a car or motorhome to get around Clare. If Ireland visitors with a family that increased to over 99%!

Figures can total more than 100% due to rounding

Q: WHEN VISITING FROM OVERSEAS, THE PORT THEY ACCESSED VIA...



- The majority of overseas respondents arrived through East Coast ports (72%).
- Those who arrived via Shannon Airport reported a superior overall Clare experience compared to those arriving via Dublin Airport. Additionally, those arriving via Shannon Airport tended to have longer stays, with 41% staying for 4 or more nights, while only 19% did so if arriving via Dublin Airport.
- It is evident that Clare should focus on attracting business through all gateways, with Shannon Airport being a priority.

Note: The mix of business via both airports (e.g. coach versus car) would be a factor in points above.

Figures can total more than 100% due to rounding

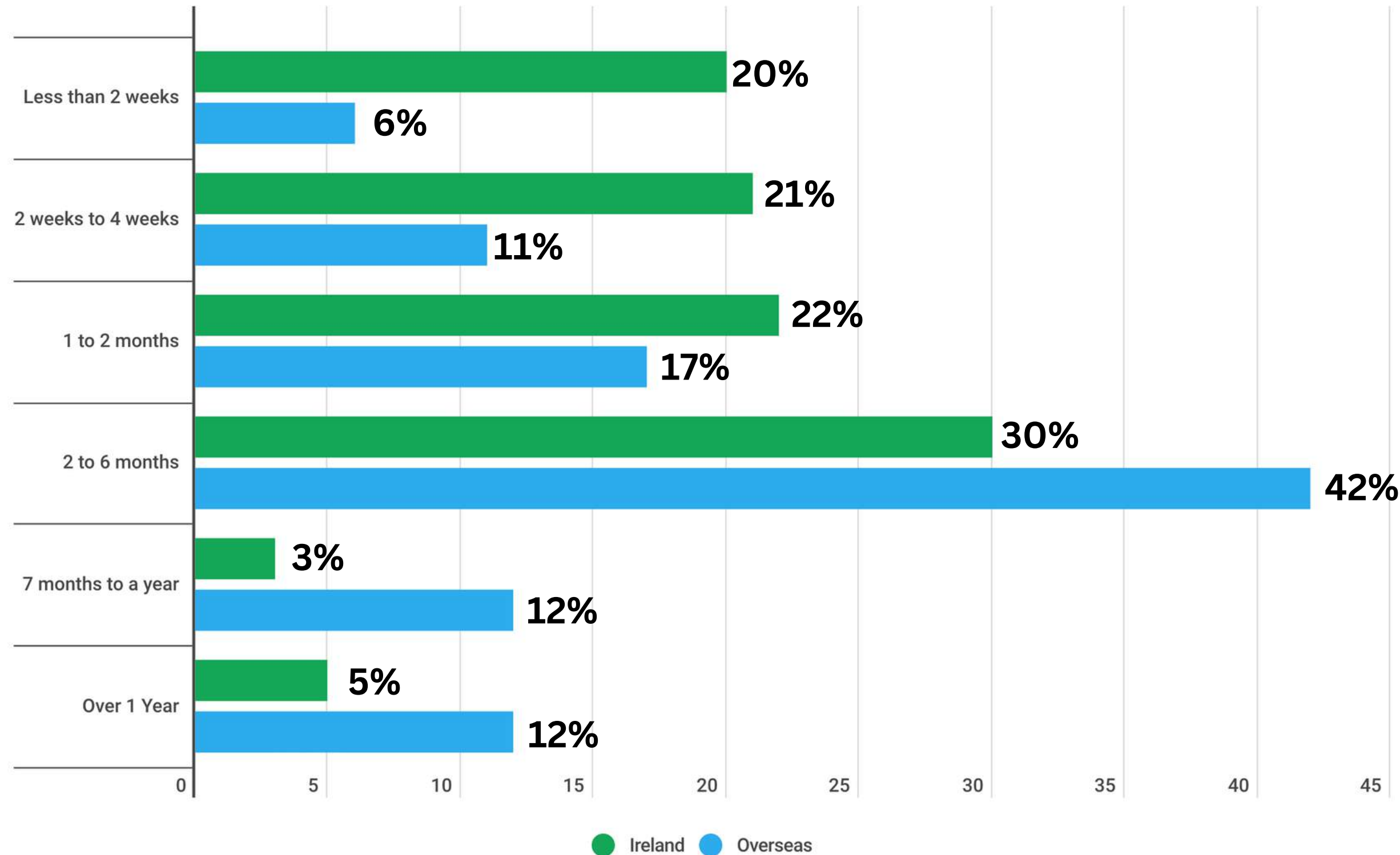
Q: HOW FAR AHEAD THEY PLANNED THEIR TRIP (IF OVERNIGHTED)



Ireland Visitors



Overseas Visitors



- Overseas visitors who stay overnight in Clare tend to plan their trips further in advance compared to visitors from within Ireland. Approximately two out of every three overseas visitors book their trip more than two months ahead, with one in four planning more than seven months ahead.
- In contrast, the majority of Ireland-based visitors plan their visits closer to their departure date. Nearly two out of every three Ireland visitors plan their trip within eight weeks of their visit, and 20% make their plans within two weeks of visiting.
- Considering the Ireland market, offering incentives can be an effective way to attract last-minute business and encourage spontaneous bookings.

What Influenced their Visit to Clare?

Ireland-Based
Visitors



Overseas
Visitors

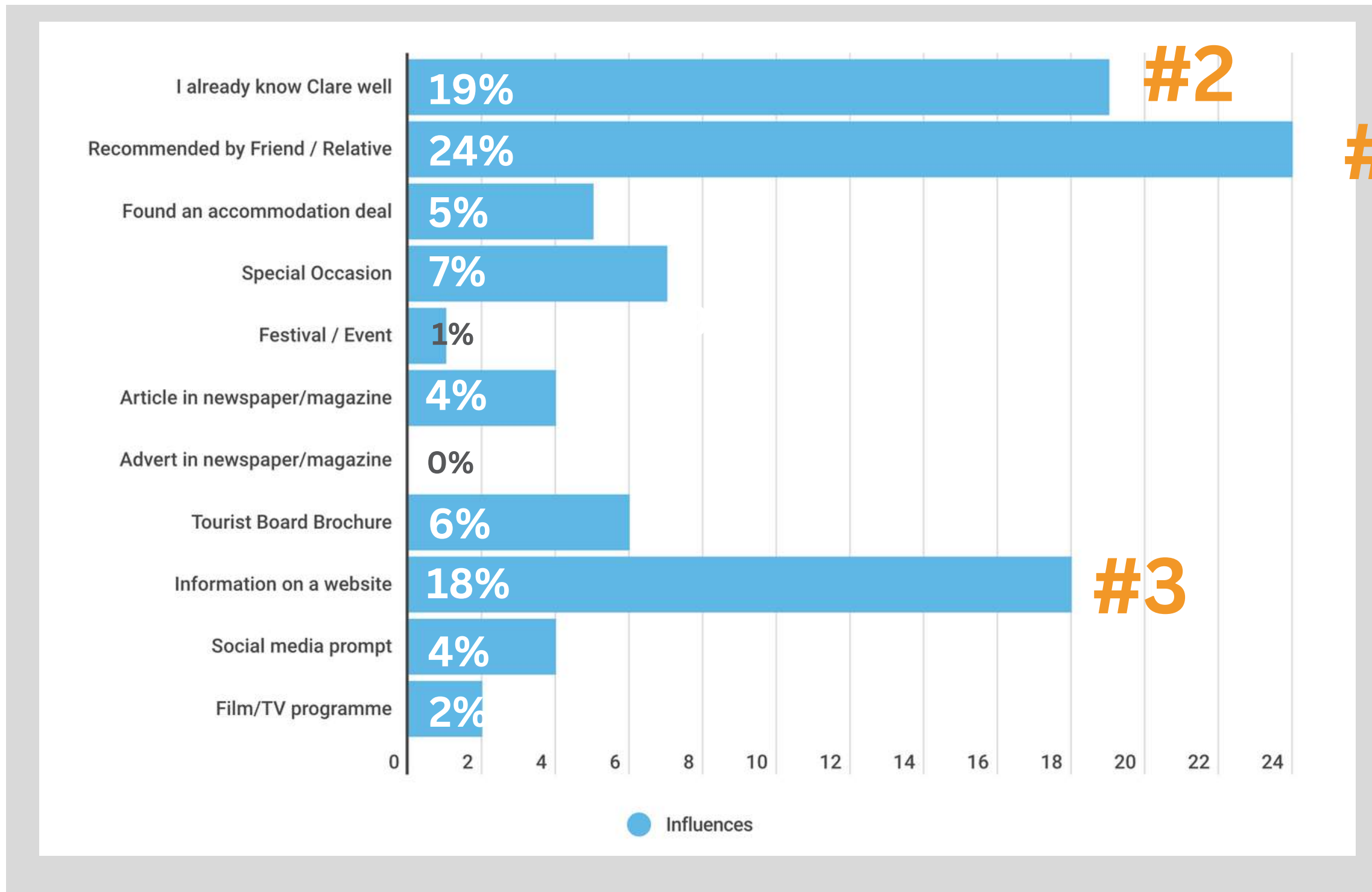


Q: THE PRIMARY INFLUENCES FOR VISITS?



Overseas Visitors

The % of overseas visitors that mentioned these as influencing their visit



The two major factors influencing overseas visitors are previous visits and recommendations. To secure future overseas business, the key is to ensure a fantastic visitor experience and take good care of visitors while they are in Clare, so they become ambassadors for the county.

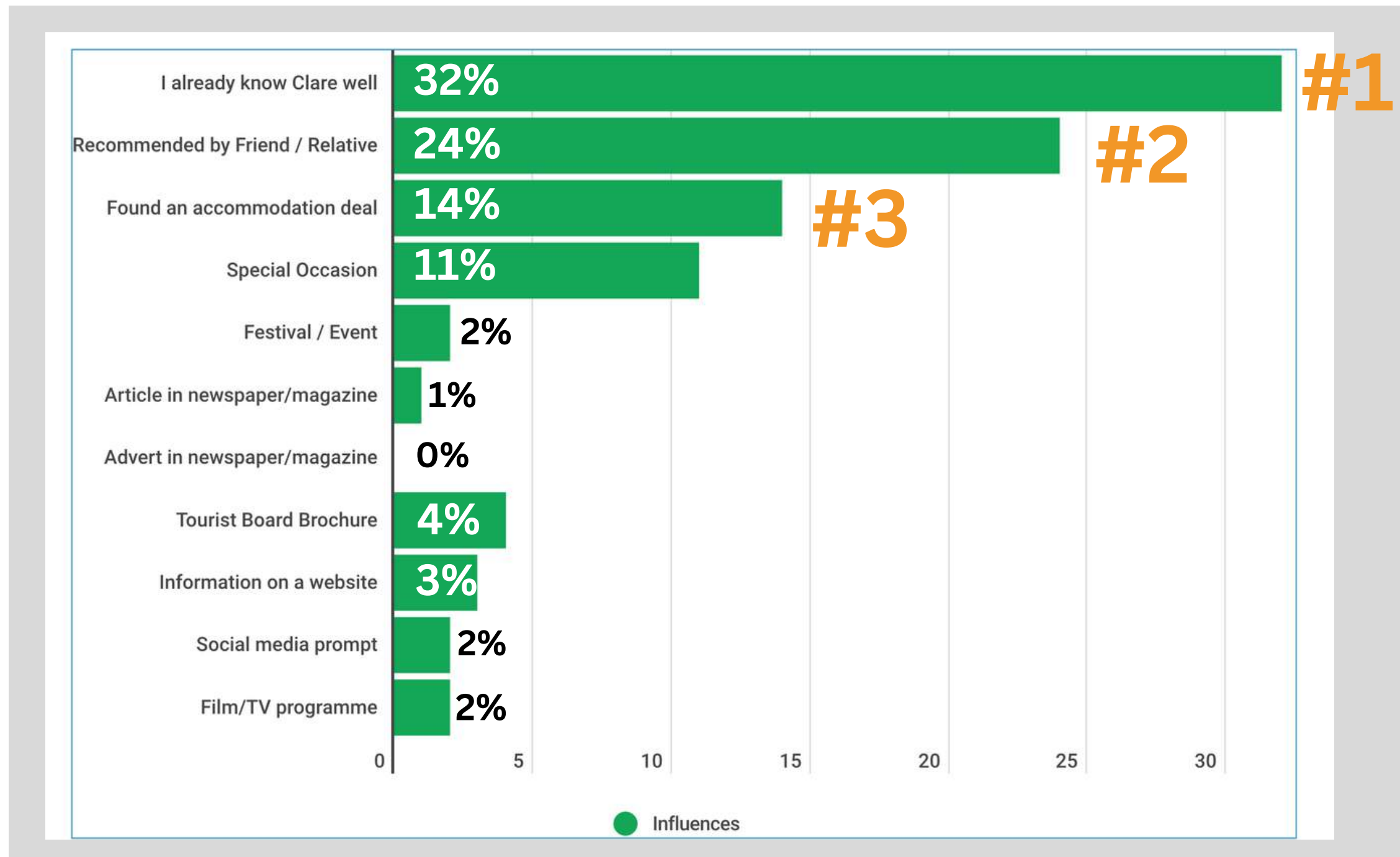
Another crucial aspect is to enhance the county's online presence, as it is often the go-to resource for potential visitors seeking to validate information about Clare or explore their options in Ireland.

Q: THE PRIMARY INFLUENCES FOR VISITS?



Ireland Visitors

The % of Ireland Visitors that mentioned these as influencing their visit



The primary motive for visitors from Ireland to choose Clare as their destination is their familiarity with and affinity for the county. The second most frequently cited reason is recommendations from others.

Hence, the key to attracting future business, similar to overseas visitors, lies in delivering exceptional visitor experiences and ensuring the well-being of guests during their stay in Clare.

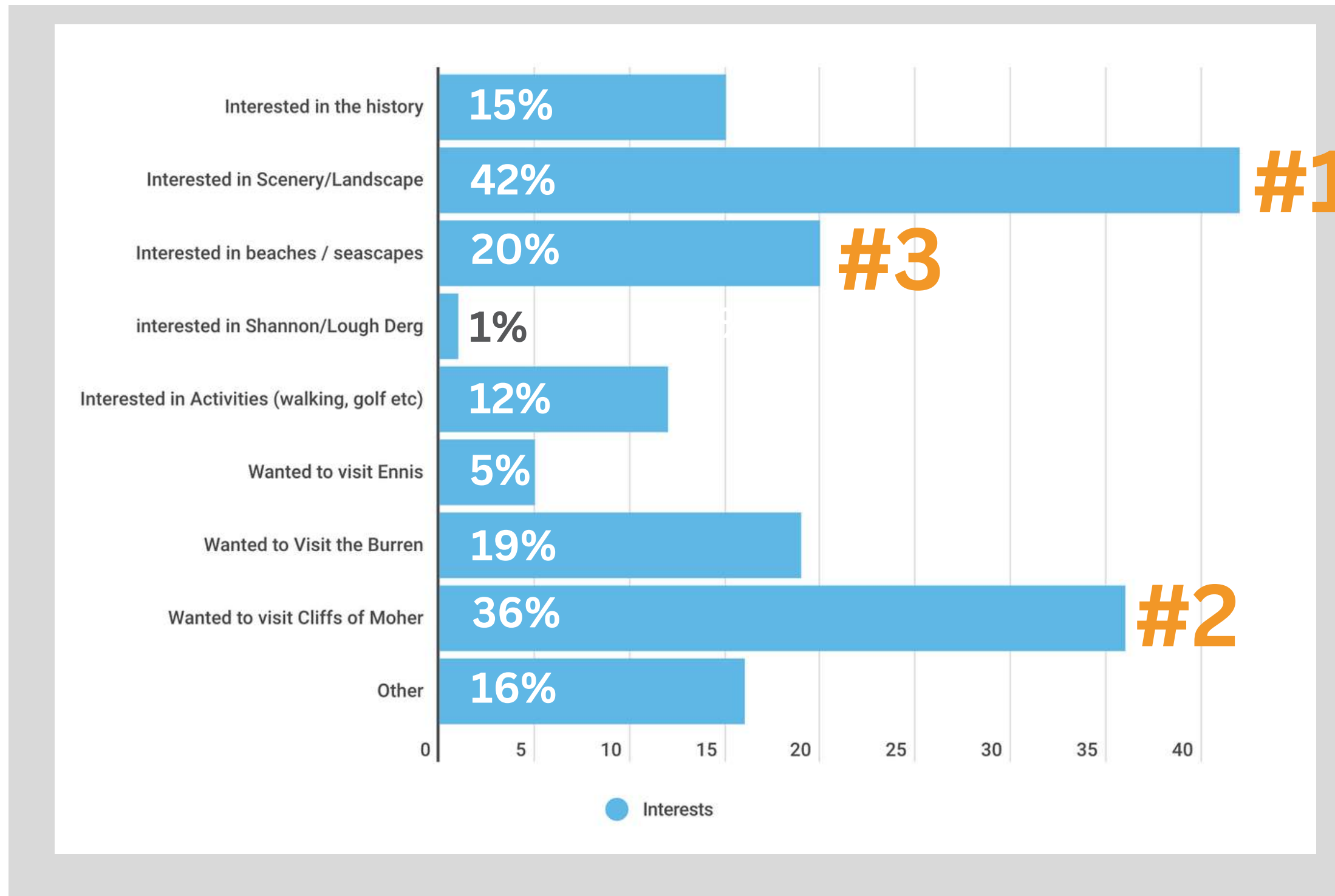
Obtaining favourable accommodation deals ranked as the third influencing factor. It is anticipated that this aspect will continue to gain importance, especially among Ireland visitors, in the foreseeable future.

Q: THEIR PRIMARY INTERESTS – WHEN VISITING?



Overseas Visitors

The % of overseas visitors that mentioned these as their interests



Overseas visitors are primarily drawn to Clare by its captivating scenery and landscape.

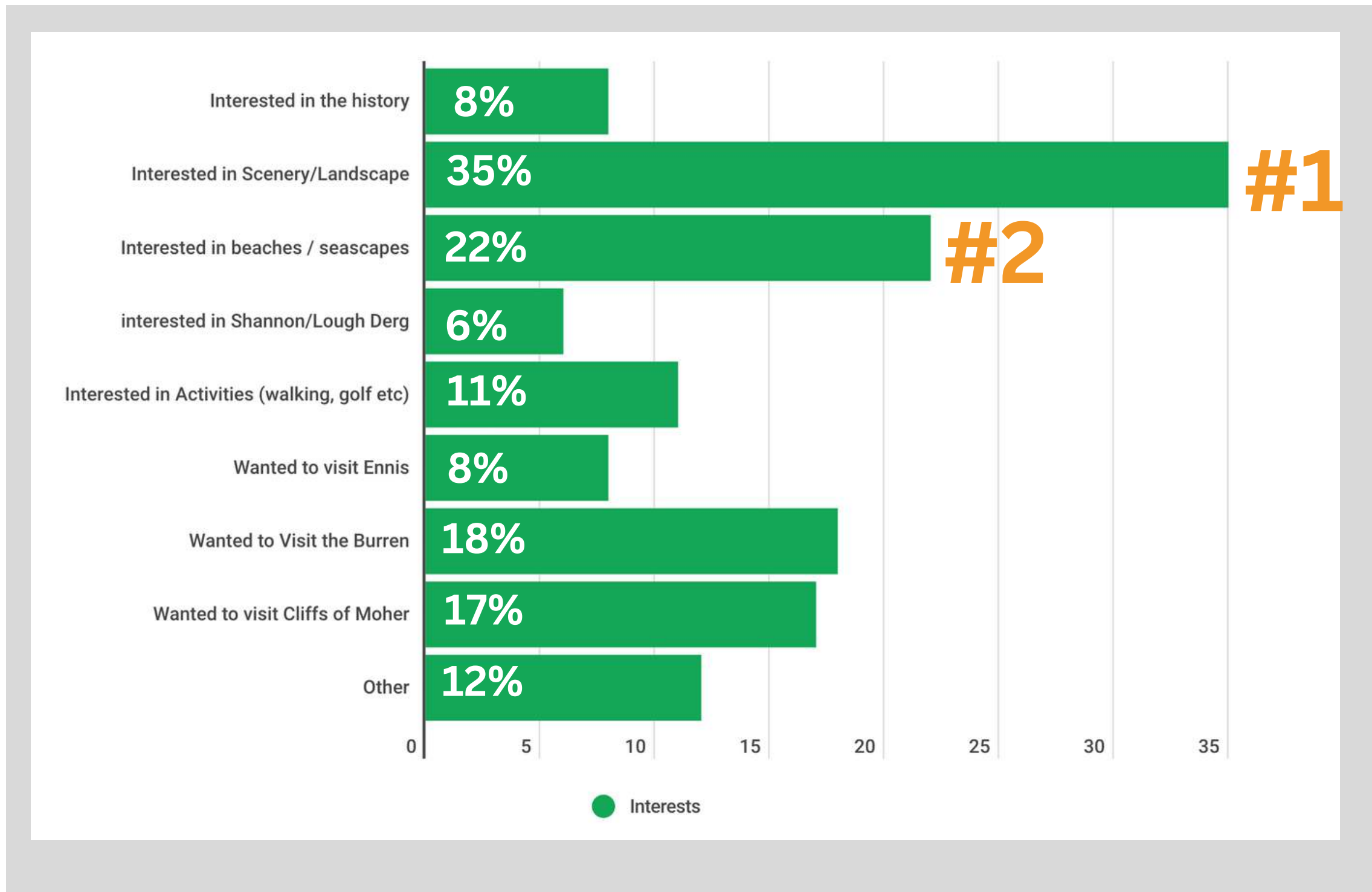
The Cliffs of Moher, renowned for their breathtaking beauty, and the distinctive appeal of the Burren are both strong attractions for these visitors. Both were mentioned by name.

Q: THEIR PRIMARY INTERESTS – WHEN VISITING?



Ireland Visitors

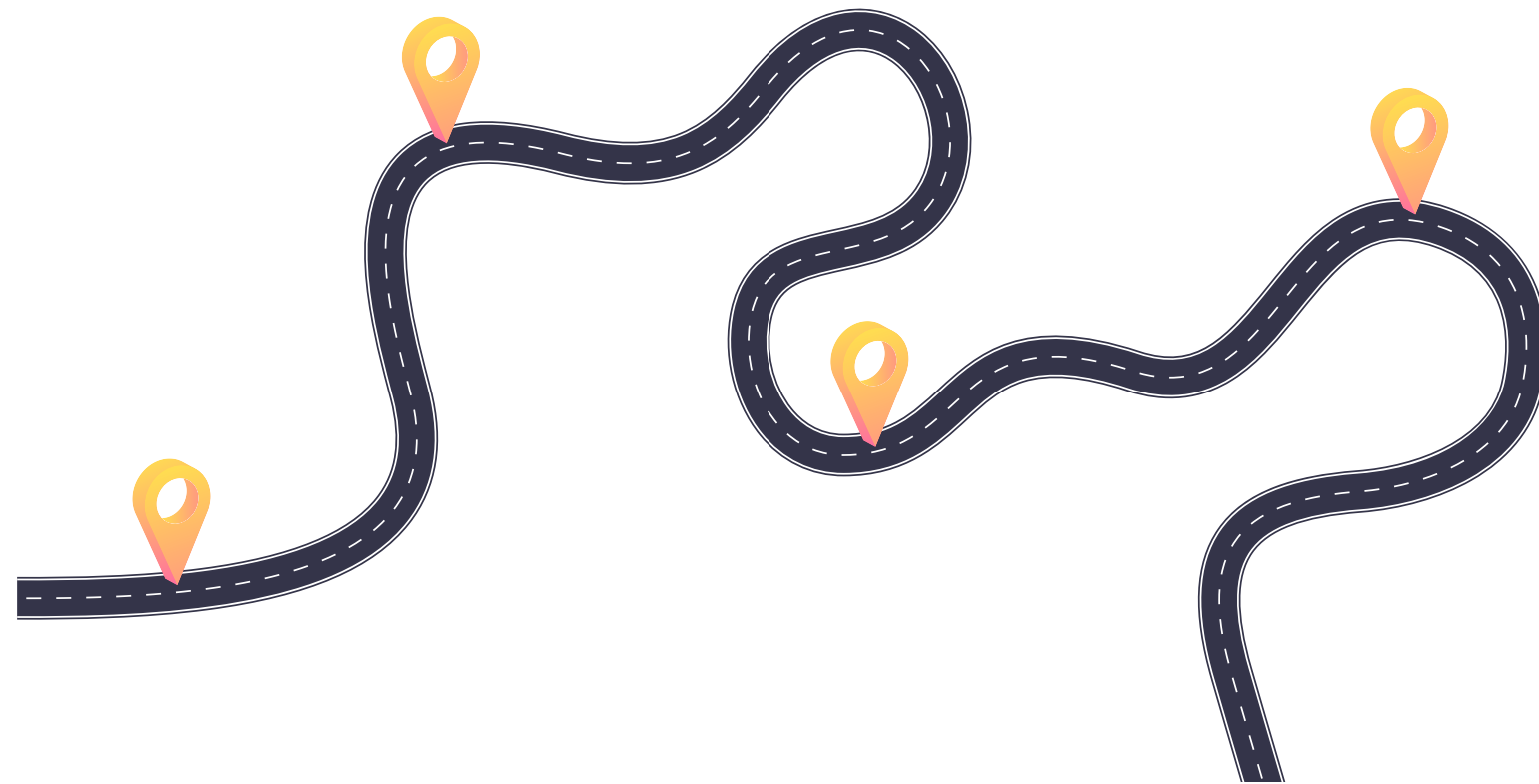
The % of Ireland visitors that mentioned these as their interests



For visitors from within Ireland, the captivating scenery, landscapes, beaches, and seascapes of Clare are the primary attractions.

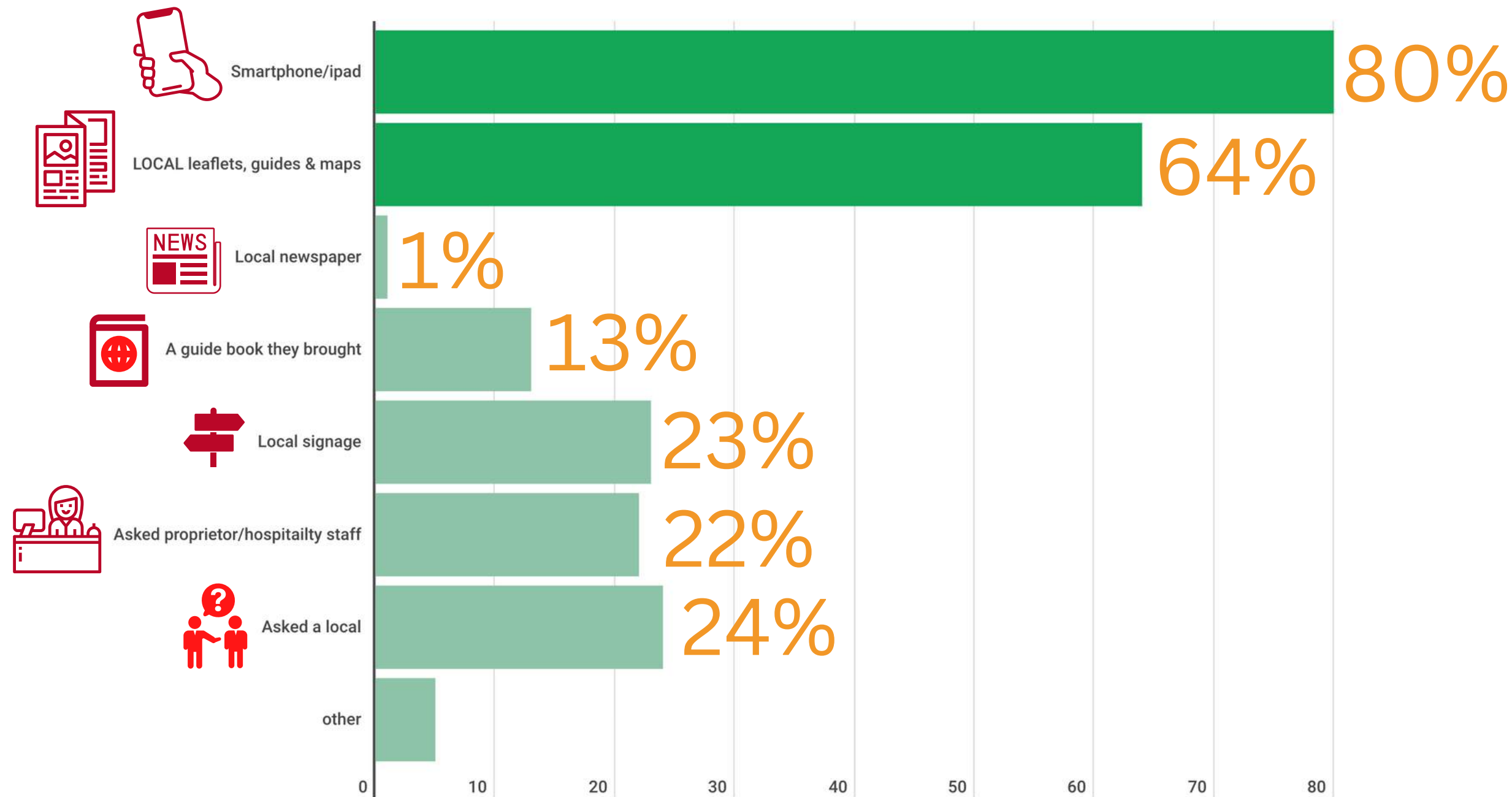
The natural beauty and coast hold significant appeal for these visitors, enticing them to visit and explore.

Where did visitors get information
during their trip about attractions,
activities and places to visit?



Q: DURING TRIP AROUND CLARE – WHERE DID THEY GET INFORMATION ABOUT ATTRACTIONS, ACTIVITIES AND PLACES TO VISIT?

The % providing the answers below



TAKE AWAY

Smartphones were the primary source of information for visitors while in Clare, followed very closely by local brochures and maps highlighting things to do in Clare.



However, it is important to consider smartphones as a tool for accessing information, often prompted by other sources such as brochures, maps, local recommendations, or signs seen by visitors. Therefore, employing a multi-layered marketing approach is crucial for influencing visitors during their time in Clare, facilitating dispersal.

This approach entails maintaining a strong digital presence, providing or having a presence in visitor brochures and maps, implementing effective signage, and actively engaging and empowering hospitality businesses and locals to be knowledgeable and enthusiastic about sharing their insights about the county.

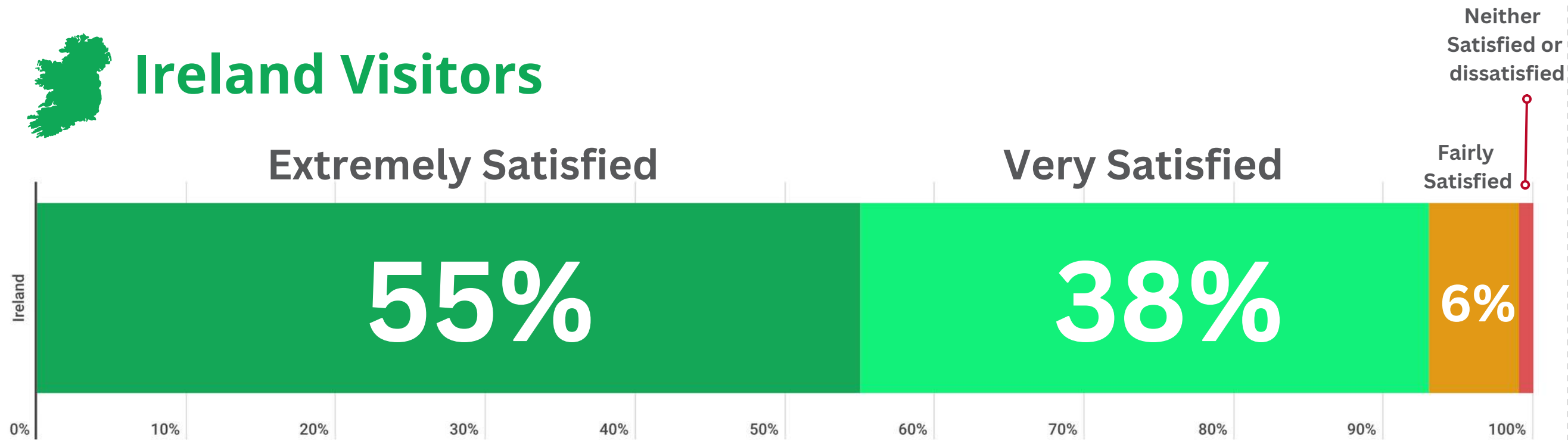
How Did Visitors Rate Clare?



Q: HOW DID THEY RATE THEIR CLARE EXPERIENCE?



Ireland Visitors

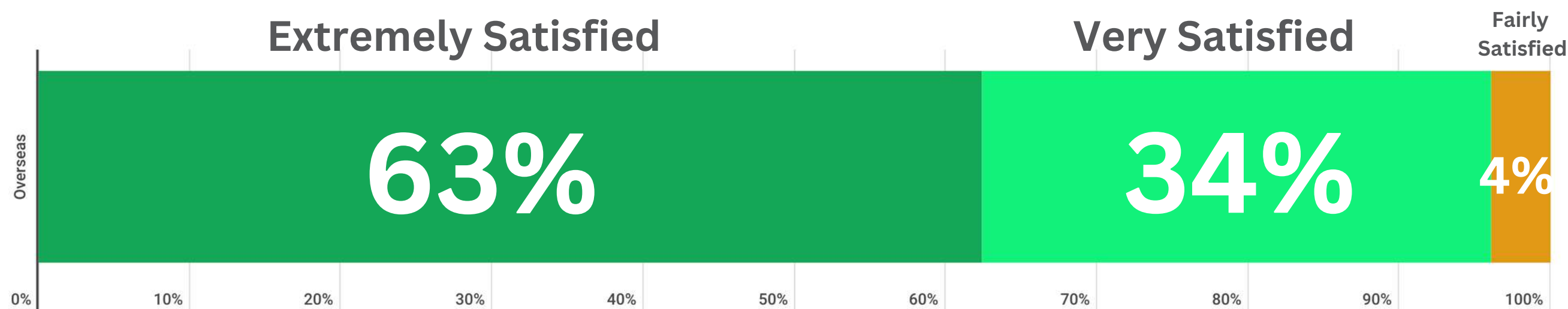


97%

An overwhelming majority of overseas visitors (97%) expressed strong satisfaction with their experience in Clare. Ireland visitors also reported strong levels of satisfaction.



Overseas Visitors



This high level of satisfaction sets a high standard. Therefore, the more visitors you attract, the greater the opportunity to create ambassadors who can promote and advocate for Clare.



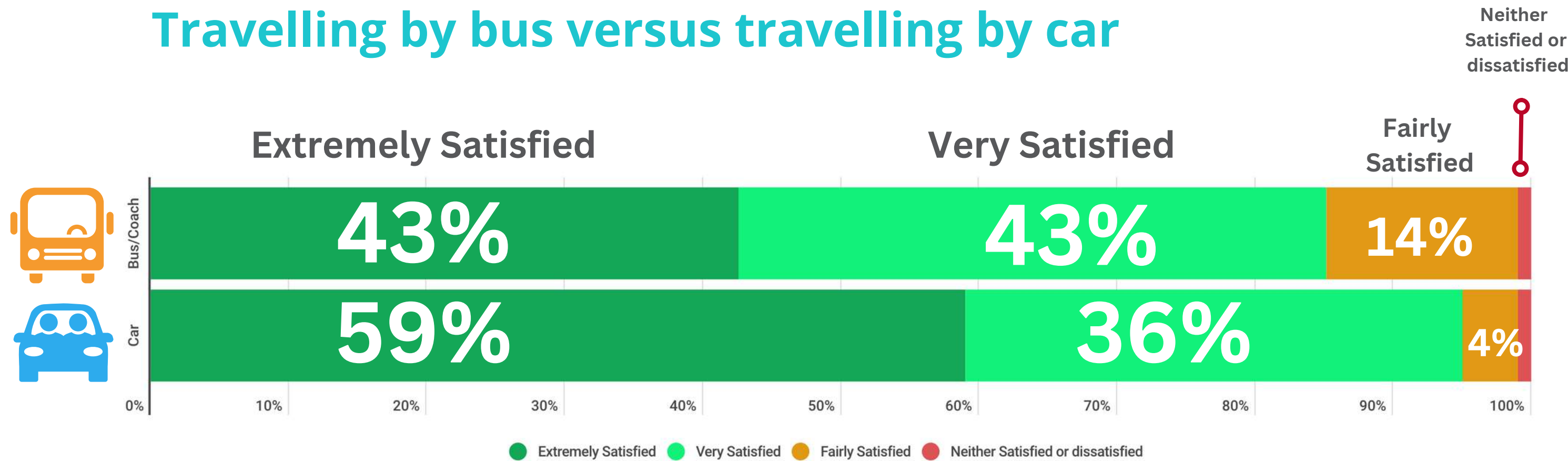
No need for complacency. See issues later.

Figures can total more than 100% due to rounding

Q: HOW DID THEY RATE THEIR CLARE EXPERIENCE?



Travelling by bus versus travelling by car

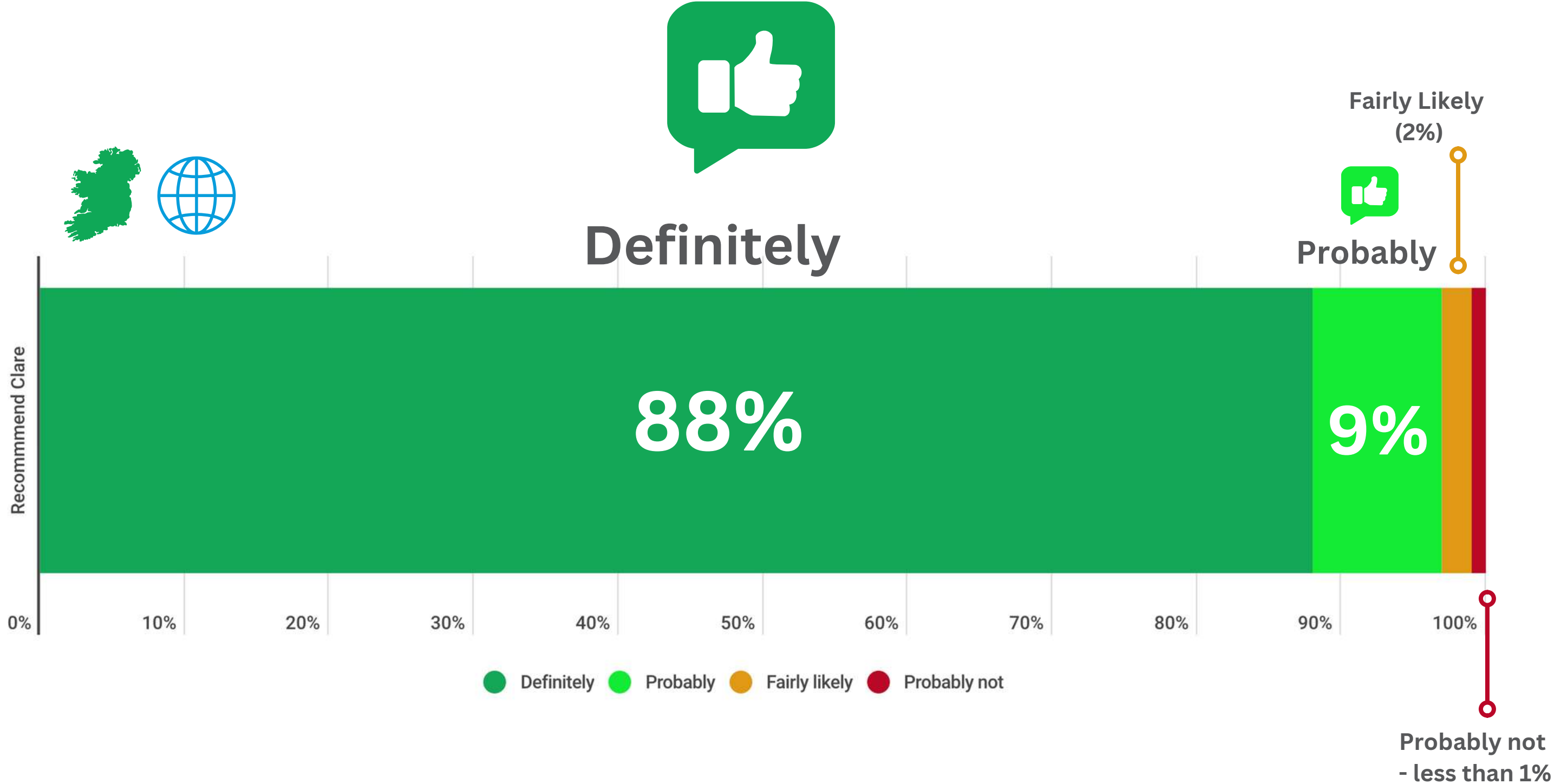


Visitors who travelled by car consistently rated their experience in Clare higher compared to those who travelled by bus/coach.

The existing limitations of bus/coach options restrict the ability to fully explore and appreciate the wider Clare experience.

Figures can total more than 100% due to rounding

Q: WOULD THEY RECOMMEND CLARE TO FRIENDS AND FAMILY?



When asked if they would recommend Clare to friends and family, the feedback received was an overwhelmingly positive endorsement.

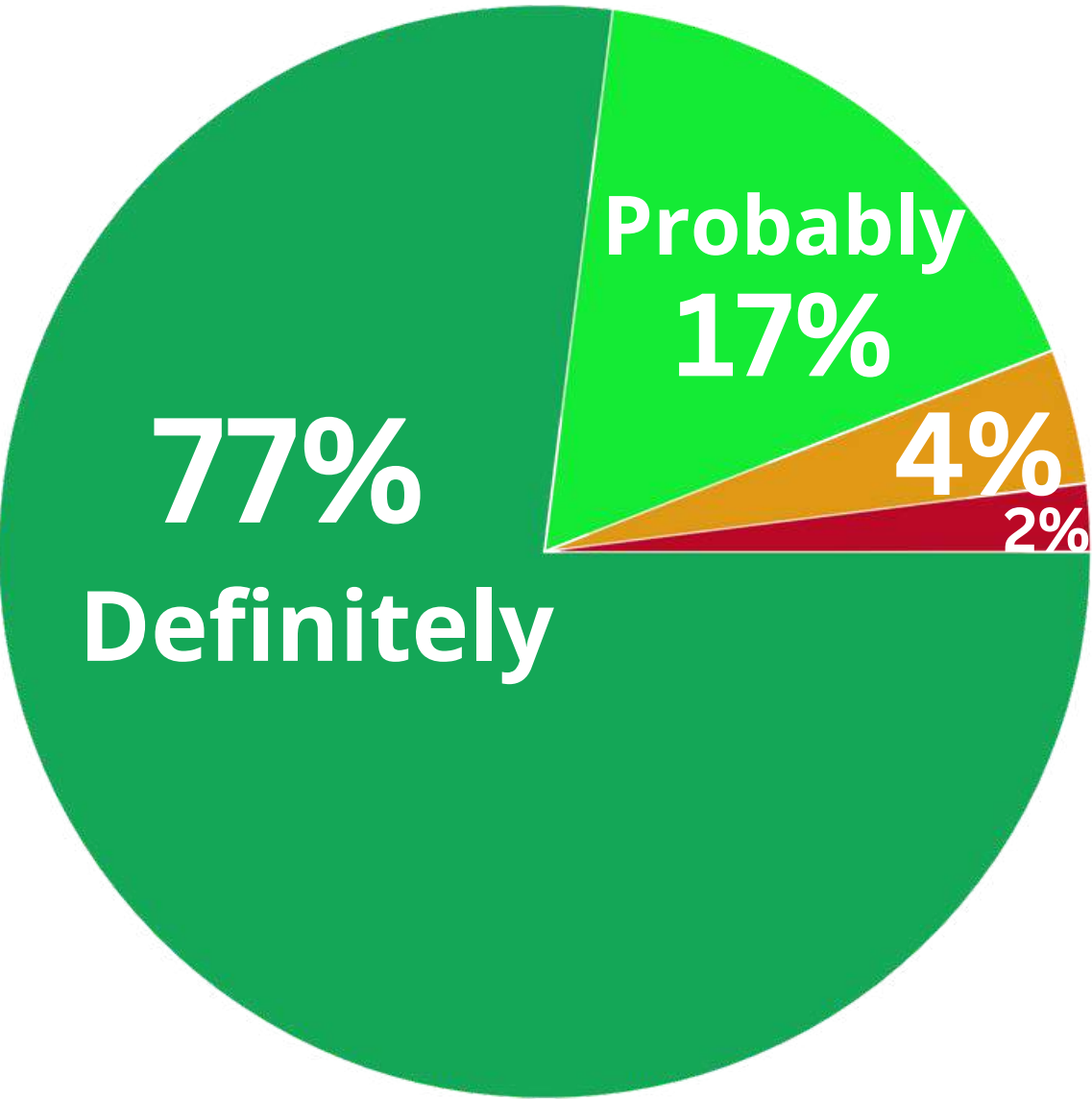
Less than 1% expressed hesitation, citing concerns about the high cost of family accommodation and limited transportation options within the county.

Figures can total more than 100% due to rounding

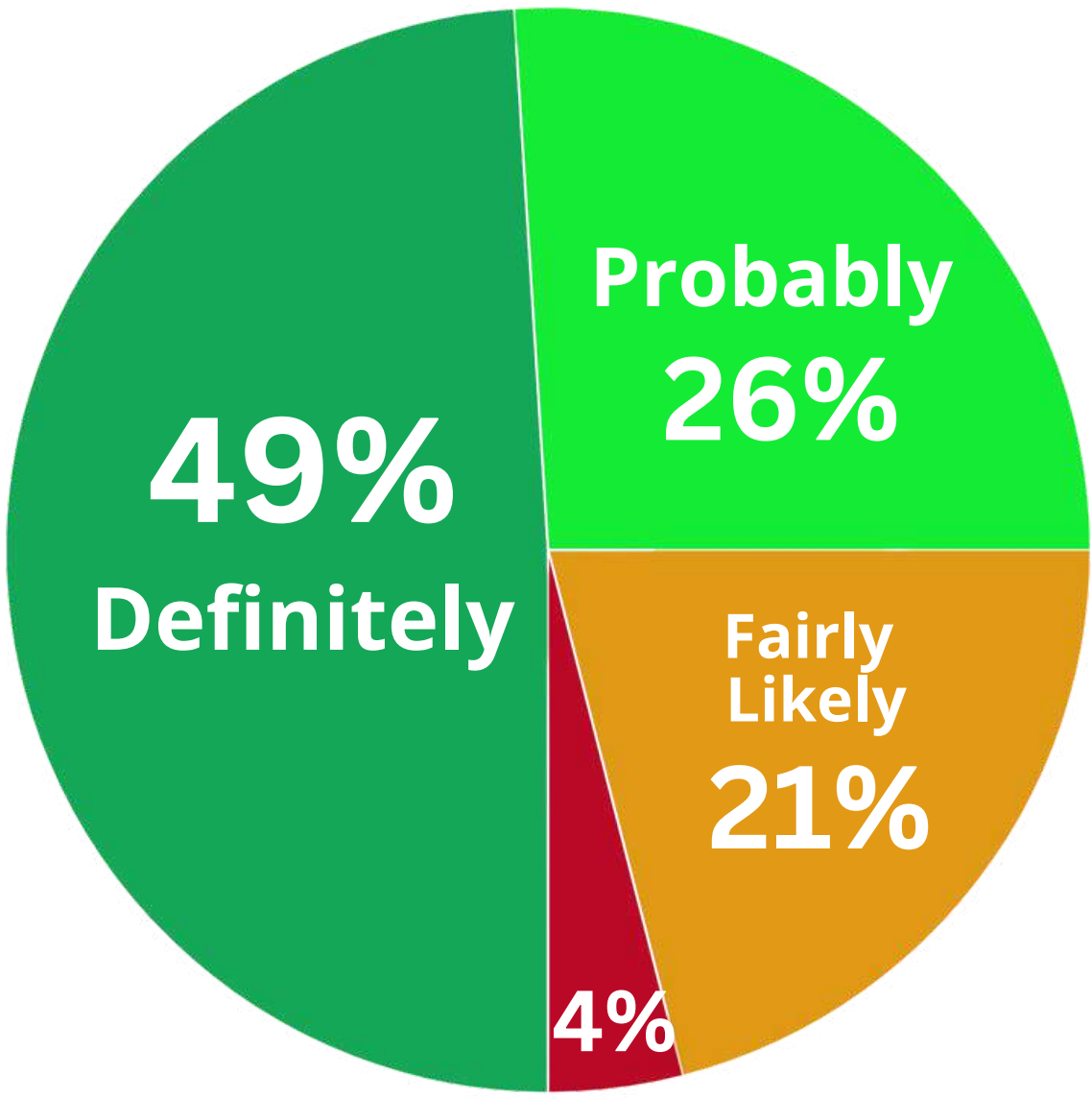
Q: HOW LIKELY TO VISIT AGAIN WITHIN THE NEXT 5 YEARS?



Ireland Visitors



Overseas Visitors



Again, the feedback received was highly positive. While a higher percentage of overseas visitors were less certain about revisiting it is important to consider factors such as long-haul destinations, limited holiday days, and the desire to explore various destinations on their wish list.

Overall, the feedback indicates a strong interest in returning to Clare and exploring it in the future.

● Definitely ● Probably ● Fairly likely ● Probably not

Figures can total more than 100% due to rounding

Q: ANYTHING THEY REALLY LIKED? **An open-ended question, unprompted**

 **Ireland Visitors**

45%

said 'the people'



 **Overseas Visitors**

54%

said 'the people'



Visitors unanimously expressed their top appreciation for the people of Clare, citing their warmth, hospitality, friendliness, and welcoming nature. Some even mentioned specific individuals and businesses.

Clare should explore ways to harness this positive sentiment, such as utilising testimonials and implementing a "Know your County" campaign before each season, recognising the significant influence of locals on visitors' experiences.

Q: ANYTHING THEY REALLY LIKED?

The most used words, by **ALL** the visitors, to describe what they liked most about Clare

An open-ended question, unprompted



Size of words indicate frequency of mentions

- 48%** mentioned "PEOPLE:
(people, hospitality, welcome, friendliness).
- 36%** mentioned "Landscape / Scenery".
- 15%** mentioned "Beaches/Coast".
- 10%** mentioned "Food".

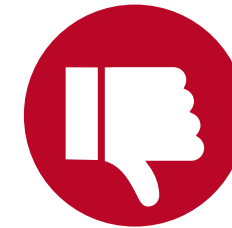
The places referenced most by name were:
The Burren, Cliffs of Moher and Ennis.

Q: ANYTHING THEY DISLIKED OR WANTED TO SEE MORE OF?

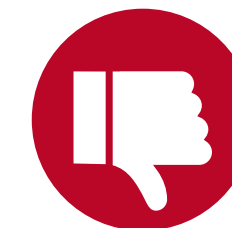
65% had **nothing they disliked**. Many reiterated the positives about Clare



32% of those with some dislike - **or 11% overall** - mentioned something to do with transport (lack of public transport; traffic; and signage).



18% of those with some dislike - **or 6% overall** - mentioned prices - typically mentioning attractions, accommodation or food.



The feedback regarding dislikes or areas for improvement was generally expressed in a considerate manner.

However, pricing (value) and transport-related concerns were recurring themes. Addressing these issues is crucial to enhance the appeal and competitiveness of Clare, and therefore should be given careful attention.

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CLARE COUNTY COUNCIL



SUMMARY FINDINGS

1 Clare is well loved

An overwhelming majority of respondents rated County Clare favourably, with 97% expressing an 'extremely satisfied' or 'very satisfied' sentiment. This exceptional satisfaction level sets a high standard and indicates the potential for growth through more effective marketing strategies. By attracting more visitors, Clare has a greater opportunity to cultivate ambassadors who will promote and advocate for the county, contributing to its ongoing success.

Recognising Variances for Deeper Insights: It is important to consider the variances in satisfaction ratings to gain deeper insights into visitor experiences. Notably, certain patterns emerge when combining the 'extremely satisfied' and 'very satisfied' categories:

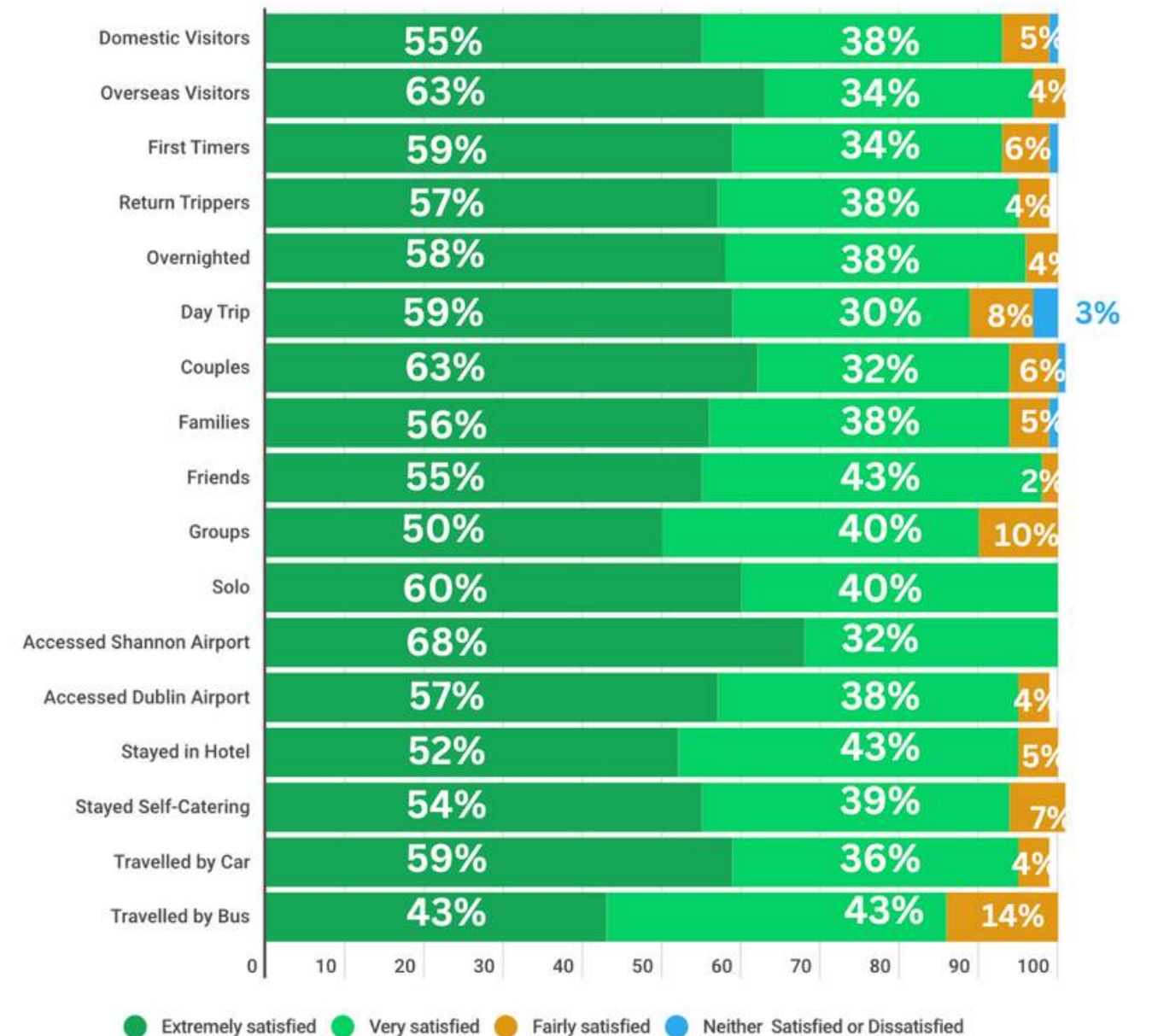
1. Car explorers reported significantly higher satisfaction levels compared to those using buses.
2. Overseas visitors expressed higher satisfaction levels than domestic visitors.
3. Non-group travellers indicated higher satisfaction levels than those travelling in groups.
4. Couples recorded higher satisfaction levels compared to families.
5. Overnight guests rated their experience higher than day-trippers.
6. Visitors arriving via Shannon Airport reported a more favourable Clare experience than those arriving through Dublin Airport. There are reasons for the latter, e.g. many arriving via Dublin travel to Clare by bus.

A Common Thread: The data suggests that longer stays and convenient travel within Clare positively influence visitor satisfaction ratings. The more that visitors can immerse themselves in the county and easily navigate its attractions, the greater their enjoyment and overall satisfaction.

These findings should prompt strategic considerations and inspire ideas for further enhancing the visitor experience in Clare.

Note: There is never room for complacency. Although few presented negatives, even when prompted, 'Value' and Transport/travel-related issues were the top two negatives.

Who gave Clare the highest satisfaction rating?



2 "The People" shone through as the most-liked 'feature' of Clare. Value it.

When the survey question "Was there anything you REALLY LIKED about Clare?" invited open and unprompted answers from visitors, the expectation was to hear about attractions and activities they enjoyed. While the survey did capture feedback on those aspects, the most frequently mentioned and standout factor, by a significant margin, was "the people."

A notable 45% of domestic visitors and 54% of overseas visitors mentioned the "people" as the key highlight. Visitors expressed their appreciation through various phrases such as the warm welcome, hospitality, and friendliness extended to them. Some even mentioned specific individuals and businesses, while others emphasised the overall positive interaction with people in Clare.

This exceptional feedback on the friendliness of the people in Clare sets it apart from other destinations. While many destinations claim to be friendly, visitors specifically attributed this quality to Clare. It is a valuable asset that should be acknowledged and capitalised upon.

- Considerations should be given to recognising their role. Collectively, they deserve the title of "tourism person of the year".
- To further encourage Clare residents to explore their region and actively participate in promoting it, a "know your region" type promotion could be implemented before each main tourism season.
- Additionally, all residents and trade members could be encouraged to "Share Clare with the world" through online resources. This can include providing them with access to photo images, social media assets, and the ability to present their contacts with the chance to win holidays in Clare. This collective effort can amplify the reach and impact of Clare's tourism promotion.
- Consideration could also be given to a "Tourism Golden Thought Award" or a similar recognition, where visitors nominate individuals or businesses that made their stay truly special. This award would go beyond mere efficiency in running a business and focus on thoughtful exceptional gestures towards visitors. It would serve as an opportunity to acknowledge and celebrate those who go the extra mile, while also inspiring others to follow suit.

The percentage of visitors who mentioned 'people' when asked what they really liked about Clare.

 Ireland Visitors

45%

said 'the people'



 Overseas Visitors

54%

said 'the people'



3

It's the County highlights and points of difference that attract visitors

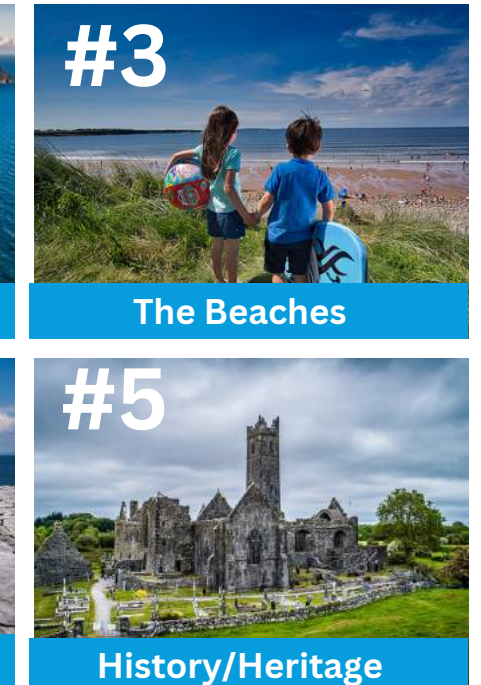
The research conducted revealed the top five broad reasons why visitors chose to visit Clare. For overseas visitors, the primary reasons, in order of importance, were the scenery and landscapes, the Cliffs of Moher, the beaches, the Burren, and the history and heritage of the region. On the other hand, domestic visitors also prioritised the scenery and landscape, followed by the beaches, the Burren, the Cliffs of Moher, and engaging in various activities.

This finding underscores the fact that most visitors are drawn to Clare because of its highlights. It is crucial to continue promoting the best that Clare has to offer, highlighting its stunning scenery, renowned landmarks, rich historical and cultural heritage throughout the county, and activity options. Additionally, the survey highlighted the significance of beaches and water-related features, particularly for domestic visitors. The coastal areas and the lakes in Clare hold considerable appeal, and this aspect should be emphasised in promotional efforts.

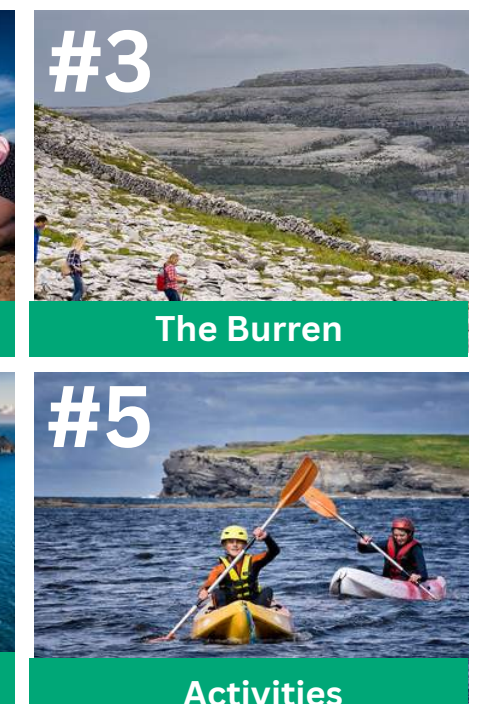
To capitalise on Clare's appeal and meet visitor expectations, it is also important to have strategies in place to encourage dispersal. Visitors are often already committed to experiencing the better-known attractions, and encouraging and facilitating their exploration of other parts of Clare will contribute to a more comprehensive and rewarding visitor experience. By providing resources, reasons, information, and incentives for visitors to venture beyond the main attractions, Clare can showcase its diverse offerings and create a more immersive and memorable visit.

Top 5 Reasons Visitors Visited

Overseas Visitors



Ireland Visitors



4

Access to County Clare: The County Clare Visitor Survey revealed interesting insights about the arrival patterns and experiences of overseas respondents. The survey found that the majority of overseas visitors (72%) arrived via the East Coast ports.

However, it was noted that those who arrived through Shannon Airport had a superior overall Clare experience compared to those who arrived via Dublin Airport. Furthermore, the survey highlighted that visitors who chose Shannon Airport as their point of arrival tended to have longer stays. Specifically, 41% of those arriving via Shannon Airport stayed for four or more nights, whereas only 19% of those arriving via Dublin Airport had similarly extended stays.

These findings underscore the importance of Clare actively pursuing business through all gateways, with special emphasis on prioritising Shannon Airport. By attracting visitors through various entry points, Clare can maximise its appeal and ensure a positive experience for a diverse range of travellers.

5

Trip Planning: Overseas visitors who stay overnight in Clare tend to plan their trips further in advance compared to visitors from within Ireland. Approximately two out of every three overseas visitors book their trip more than two months ahead, with one in four planning more than seven months ahead.

In contrast, the majority of Ireland-based visitors plan their visits closer to their departure date. Nearly two out of every three Ireland visitors plan their trip within eight weeks of their visit, and 20% make their plans within two weeks of visiting.

6

Considering the Ireland market, offering incentives can be an effective way to attract last-minute business and encourage spontaneous bookings.

Attracting Visitors: The two major factors influencing **overseas visitors** are previous visits and recommendations. To secure future overseas business, the key is to ensure a fantastic visitor experience and take good care of visitors while they are in Clare, so they become ambassadors for the county. Another crucial aspect is to enhance the county's online presence, as it is often the go-to resource for potential visitors seeking to validate information about Clare or explore their options in Ireland.

The primary motive for visitors from **within Ireland** to choose Clare as their destination is their familiarity with and affinity for the county. The second most frequently cited reason is recommendations from others. Hence, the key to attracting future business, similar to overseas visitors, lies in delivering exceptional visitor experiences and ensuring the well-being of guests during their stay in Clare.

Obtaining favourable accommodation deals ranked as the third influencing factor for domestic visitors. It is anticipated that this aspect will continue to gain importance, especially among Ireland visitors, in the foreseeable future.

7

Influencing Visitors during their Stay: The survey findings indicate that while smartphones are the primary means of obtaining information (80%) for visitors while in Clare, it is important to note that they are often not the primary prompt for seeking that information. Smartphones serve as a tool for accessing additional information, often prompted by other sources such as visitor guides, brochures, maps, recommendations from locals, or signs that catch the visitors' attention. This highlights the need to recognise the limitations of viewing digital as the sole influencer of visitor behaviour and exploration during their visit

Furthermore, the survey revealed that visitor guides, brochures, and maps play a significant role in shaping visitor experiences and providing valuable information during their trip. A substantial 64% of respondents mentioned using printed local visitor guides and brochures about 'things to do' as well as maps as their source of information while in Clare.

Based on these findings, it is important to adopt a multi-layered marketing approach that recognises the influence of both digital and non-digital resources during trips. Printed materials and signage and local interaction serve as prompts for visitors to explore beyond the well-known attractions and engage in a deeper exploration of the county.

In addition, efforts should be made to encourage interactions with locals who can provide personalised recommendations and insights. This can be achieved through training and collaboration with hospitality businesses and locals to ensure they are equipped with up-to-date knowledge about the county's offerings.

By leveraging both digital and printed resources, along with the expertise of locals, the trade in County Clare can create a comprehensive information ecosystem that prompts and guides visitors, facilitating exploration and dispersal throughout the county.

8

Transport: within Clare. The survey findings reveal that a significant majority of Irish visitors (97%) experienced Clare by car. Additionally, when travelling with a family, whether from Ireland or overseas, an overwhelming 99% of visitors opt for car travel. While we may wish it otherwise, currently travel by car (or walk or bike) is the only way to have an immersive experience in Clare. Anything that negatively impacts mobility e.g. car hire costs will impact tourism in the county

The availability of non-Car Transport was highlighted as a negative by some visitors. To address transport-related concerns, Clare should focus on improving transportation infrastructure within the county. This can involve enhancing public transportation services, exploring shuttle options, and establishing partnerships with private transportation providers. The goal should be to provide and promote convenient and reliable transportation solutions that connect different attractions and destinations, making it easier for visitors to explore Clare.

By addressing the transportation issue and offering alternative modes of travel, Clare can cater to a wider range of visitor preferences and contribute to a more sustainable and accessible tourism experience.

9

Value for money: Value was identified as a concern by certain visitors, particularly families. To address this, tourism stakeholders (accommodation providers, attractions, activity providers, and others) should collaborate.

A key strategy is to develop and promote attractive accommodation packages and offers that emphasise value for money. This can involve partnering to create special deals and discounts for couples and families, highlighting the affordability and benefits of choosing Clare as a destination.

Additionally, it is important to showcase the family-friendly value options available in Clare, such as affordable attractions, activities, dining options, and amenities suitable for families.

By fostering collaboration and promoting value-driven initiatives, Clare can enhance its appeal to visitors while addressing the concerns raised regarding pricing. This collaborative approach will not only attract more visitors but also contribute to their overall satisfaction and positive experience in the county.

10

Leverage the Power of Visitor Testimonials and Reviews: The survey itself brought forth excellent comments and feedback from satisfied visitors. Clare should harness the power of positive testimonials and reviews as a compelling marketing tool. Actively collecting and showcasing visitor feedback through various platforms, including the official website, social media channels, and promotional materials, can create a powerful impact.

By sharing authentic experiences and highlighting positive reviews and testimonials, Clare County Council can inspire and engage potential visitors. These testimonials serve as a testament to the exceptional visitor experiences in Clare and reinforce the positive reputation of the County.

Incorporating visitor testimonials and reviews in marketing efforts provide social proof and builds trust among potential visitors, motivating them to choose Clare as their preferred destination.

Clare could also consider encouraging visitors to share their views of Clare directly on their own networks. Sample below!

