

COMPREHENSIVE ASSESSMENT REPORT ON THE MOTORHOME AND CAMPERVAN SERVICE PROVISION IN CLARE

Prepared for Clare
County Council



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EXECUTIVE SUMMARY

Clare County Council commissioned Repucon Consulting to undertake an independent assessment of the current levels of provision for Motorhomes and Campervans (M&C) in the county. The report is a direct output from the actions contained within the County Clare Tourism Strategy 2030 and a proactive approach to determining the best way forward to cater for increasing numbers of M&C visitors to the county.

Among the key objectives of the assessment included the examination of the potential for growing the value of M&C activity for the local economy, establishing a baseline of current levels of M&C facilities to include registered sites, non-registered M&C accommodation and wild camping locations. The assessment also included research to develop a profile of motorhome and campervan visitors to County Clare and understand their needs and motivations for travel.

In terms of M&C provision, Fáilte Ireland statistics detail six registered caravanning and camping properties in Clare. This independent audit established the use of 69 locations across Clare for M&C overnight parking which included registered sites, other fee-paying locations to motorhome stopovers and wild camping locations. Approximately 70% of pitches are located along the Wild Atlantic Way coastline of the county.

Clare is ranked sixth out of eight Wild Atlantic Way regional counties for the number of camping and caravanning pitches it currently has available. It currently provides 829 bed spaces across 5 properties with a total of 218 pitches/units. There is a considerable gap in provision in contrast to destinations such as Kerry, Cork, Mayo and Donegal. The communities within Clare associated with the Ireland's Hidden Heartlands features only one registered property offering 270 bed spaces.

Clare continues to be a popular destination for motor home and camper van visits (M&C), attracting an estimated 78,000 visitors per annum generating 163,000 overnights for the county. 83% of M&C visits to the county originate within the Republic of Ireland with Northern Ireland accounting for 13% of visits. International visitors represent 4% of visitors who stay at least one night in the county. Almost a

quarter of M&C visitors to Clare return between 3 and 5 times a year, highlighting its appeal and accessibility. 28% of visitors will always stay in an official campsite while 68% will only sometimes stay in official campsites. 41% of visitors state that they tend to split their stay in Clare between official sites and wild camping. Wild camping will continue to be a challenge particularly in a number of coastal "hot spots" that are generating significant volumes of unauthorised overnight camping. This will remain an issue in the absence of appropriate provision of year round and peak period M&C facilities. The parking bye laws require enforcement and appropriate resourcing in order to address the scale of unauthorised M&C parking across the county.

The current M&C visitors to Clare contribute €7.5 million in direct expenditure to the local economy and an overall economic impact in excess of €10 million per annum.

Formal M&C locations are considerably outnumbered by the volume of wild camping stopovers used by the network of M&C visitors to Clare. This will continue to grow based on the influence of social media and M&C owner network.

The current level of M&C visits who Wild Camp in the county is an estimated 60% of the overall total i.e parking overnight at informal parking locations such as carparks and coastal viewpoint locations. The current availability of M&C facilities across the county is a direct market response to the demand for coastal locations. However, the absence of facilities in South and East Clare is limiting potential local tourism development opportunities and increased distribution of tourism economy benefits across the county. The potential domestic market reach of Clare as a M&C destination is considerable. There are currently 18,000 M&C registered owners in the Republic of Ireland. The market reach of Clare for weekend or longer stay breaks is 5,500 M&C owners within two hours of the county. This increases to a market potential of 15,000 M&C owners within a three hour journey to Clare.

A programme of M&C owner research undertaken as part of the study suggests a strong willingness to stay in more formal facilities based on their priority requirements which include access to safe overnight parking locations and the ability to dispose of waste.

The research into visitor needs reinforces the international research with visitor priority requirements being safe parking, grey and black waste disposal, access to fresh water and the ability to park overnight in close proximity to local hospitality and evening entertainment.

The study also included a programme of international benchmarking in addition to domestic examples of best practice in M&C provision. International examples included Scotland, France and New Zealand with national sites such as Graigueenamanagh, Cobh, Portumna and Donegal also examined. Among the learnings arising from this include the potential role of Social Enterprises / Community Groups, the need for installing M&C service points, and the requirement for a strong online presence in attracting and guiding M&C visitors to and within a destination.

The independent assessment identified four opportunity categories to consider in the strategic development of M&C provision across the county. The M&C opportunity framework for Clare is aligned with the sector audit, emerging opportunities and how the approach will contribute to the achievement of the objectives of the Clare County Tourism Strategy. The four strategic opportunities are categorised as 1) Functional Priority Locations, 2) High Potential Locations, 3) Opportunity Locations and 4) Regenerative Locations. A total of twenty-one towns and villages have been identified for immediate consideration.

The report provide a series of recommendations for consideration that include a focus on parking and bylaws implementation, addressing the supply side challenge across the county, development of a code of practice, introduction of destination initiatives such as Clare Welcome hosts sites, ensuring agency funding alignment and future considerations around planning requirements.



SECTION 1

INTRODUCTION AND TOURISM CONTEXT



1.1 INTRODUCTION

Clare County Council commissioned Repucon Consulting to undertake an independent assessment of the current levels of provision for Motorhomes and Campervans* (M&C) in the county. The report is a direct output from the actions contained within the County Clare Tourism Strategy 2030 and a proactive approach to determining the best way forward to cater for increasing numbers of M&C visitors to the county.

Post pandemic there is a continuing growth in demand for M&C spaces among domestic and international visitors. This is further compounded by sustained growth in M&C ownership nationally and internationally. This comprehensive assessment examines how the destination can maximise and manage the opportunity the M&C sector presents for tourism in Clare.

The objectives of the assessment include;

- Delivery of the objectives of the County Clare Tourism Strategy 2030 to examine the potential for growing the value of M&C activity for the local economy.
- Establish a baseline of current levels of M&C facilities to include registered sites, non-registered M&C accommodation and wild camping** locations.
- Develop a profile of M&C visitors to County Clare to understand their needs and motivations for travel.
- Assess the position of Clare as M&C destination in the national context.

- Examine national and international best practice and trends to establish what opportunities should be explored within Clare.
- Estimate the potential social, economic and environmental impacts from provision of M&C services to the market.
- Establish the challenges faced by the destination in growing the value of M&C for Clare.
- Present a series of strategic recommendations on the next steps to consider in realising the M&C opportunity for Clare.

The following assessment reflects the emerging trends within the M&C sector taking account of the needs of visitors based on their motivations to travel in addition to determine the optimum solution for county Clare as a visitor destination and growing the economic return for local communities who are increasingly hosting more M&C visitors. It provides a series of recommendations that provides a roadmap for towns and villages to consider in accommodating M&C visitors. The opportunity framework features a number of locations identified under four strategic development categories reflecting the immediate to longer term M&C opportunities for Clare. It should be noted this does not preclude other locations that have the capacity to deliver on some of the recommendations but should act as an indicative list where immediate gaps in the current levels of provision can be addressed.



* In the assessment a motorhome has been considered to be a fully self-sufficient vehicle with all activities such as cooking and washing able to be performed inside the vehicle. Such vehicles typically have toilets and showers on board with capacity to store fresh and wastewater for a number of days. Campervans typically do not have toilets and washing facilities onboard, requiring access to more facilities on a daily basis.

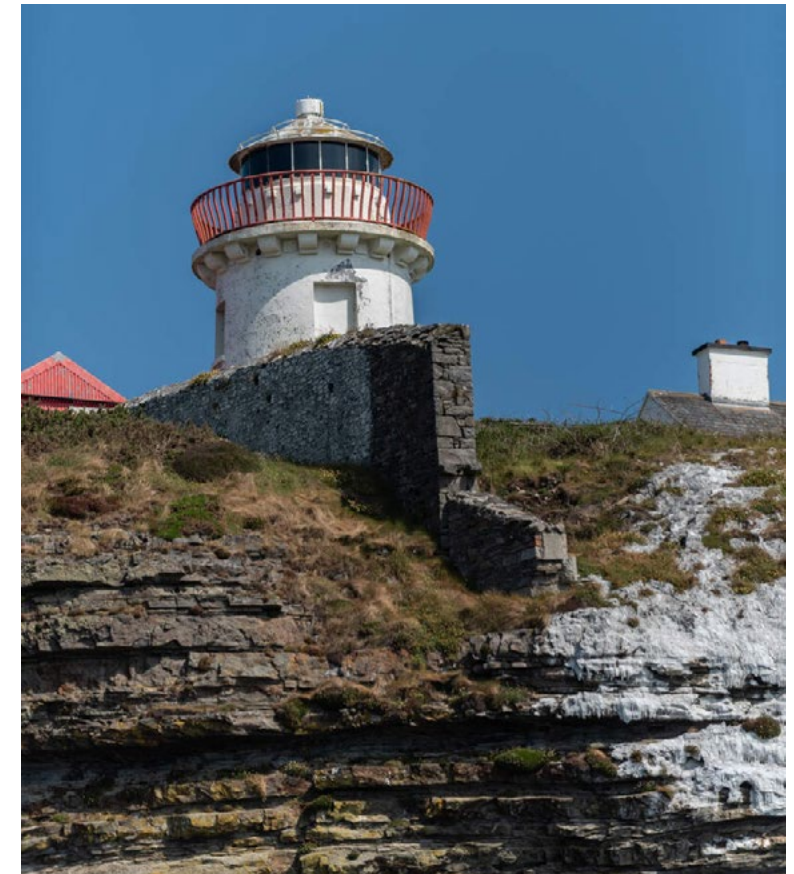
** For the purpose of this analysis Wild Camping is the term employed to capture M&C overnight stays in non-paying locations such as car parks, quaysides and public / private land.

1.2 METHODOLOGY

PROJECT METHODOLOGY

The independent assessment of M&C activity in Clare was conducted using a multi-faceted project and consultative approach. The methodology employed included the following;

- Examination of the M&C sites currently promoted by private operators and wild camping sites advocated by M&C networks. This represented the baseline to determine current supply levels and patterns of behaviour around wild camping throughout the county.
- Mapping of current M&C sites and site audit of the 69 locations identified in the audit process using an assessment criteria to understand the site location characteristics and potential community and economic value each site can generate.
- Programme of consultation with all Clare County Council Municipals Districts (MD) and elected members in addition to Clare County Council executive members across each MD to identify potential opportunities aligned with their respective strategies and plans.
- International and national best practice review.
- International and national trends analysis and review of existing primary research on M&C visitor behaviour.
- Primary research to assess the appeal of Clare as an M&C destination, visitor requirements and visitor spend in the area. A total of 158 interviews were completed and used as the basis for the economic impact and visitor behaviour modelling.
- Facilitation of a site visitor by Clare County Council elected members and staff to Graigenamanagh to examine a site identified as an example of best practice.
- Review of strategic project and policy documents for Clare that will influence future investment and potential new visitor flows based on proposed product investment e.g. attractions, greenways.
- Development of a M&C site opportunity model to frame the emerging opportunities of a number of towns and villages based on the research findings.
- Clare camping sector engagement through an industry survey and consultations.
- Consultations with key stakeholders including Fáilte Ireland, Irish Caravan & Camping Council, Motorhome Associations, Cork County Council (Cobh MD).



1.3 STRATEGIC CONTEXT - COUNTY CLARE TOURISM STRATEGY 2030

VISION

Clare is a globally renowned sustainable and vibrant destination, recognised for its compelling array of adventure activities and its remarkable experiences portraying our rich culture-scape of age-old spirituality, power and influence; our contemporary vitality arising from our deep-rooted traditions in music, sport and innovation; our dynamic rural towns and villages where our hospitality excels – all set within our stunning backdrop of unique and varied living landscapes.

Goals:

To work collaboratively:

1. To deliver compelling quality experiences that reflect and leverage our unique identity.
2. To be globally recognised as a sustainable destination.
3. To create a smart destination that reflects our strong commitment to sustainability, connectivity, innovation and new approaches to doing business.
4. To be regarded as ‘the gateway to the west’.
5. To spread the benefits of tourism across the county and throughout the seasons in a way that enriches our communities while maintaining our distinctive identity and the integrity of our landscapes.

Strategic Direction:

- Strengthen leadership and collaboration.
- Improve connectivity.
- Build vibrant experiences.
- Enhance supporting infrastructure and knowledge.
- Create awareness.

Relevant Strategic Challenges:

- Concern regarding the underlying sustainability of the industry and the destination. The shift in market dynamics has highlighted the need to look at sustainability as an integral element of competitiveness.
- Green infrastructure that would facilitate alternative active modes of transport and connection is largely absent and regarded as a major deficit within the county.
- Lack of adequate camping and caravan/RV sites and a need for quality infrastructure for this market.
- Lack of adequate water and wastewater facilities in a number of rural towns and villages.
- Inadequate public toilets, street lighting, signage, parking and litter facilities in areas.



RELEVANT STRATEGIC PRIORITIES:

1. Work towards positioning Clare as a destination to be recognised nationally and internationally for its commitment to responsible tourism and sustainability.
2. Develop new and strengthen existing approaches to generating integrated and cross-sectoral partnerships in tourism locally and regionally.
3. Develop and implement a public transportation strategy that addresses sustainable travel options designed to support tourism – focusing on enhancing connectivity between local destinations and providing visitors with viable mobility options.
4. Work with the Department of Transport, Tourism and Sport to promote timely completion of major transportation infrastructure projects and ancillary initiatives that have the capacity to strengthen tourism.
5. Raise awareness and support for initiatives that will assist in creating a more accessible and inclusive destination.
6. Build the concept of sustainability firmly into ongoing planning processes for tourism and outdoor recreation.
7. Undertake a comprehensive assessment of hotel and visitor accommodation and develop an accommodation strategy to support the growth of overnight visitation –
8. An audit of gaps in accommodation – range and diversity of offer, availability of rooms, quality of offer, accessibility, and supporting services.
9. An evaluation of non-registered accommodation offered on sharing platforms, particularly AirBnB to assess quantity, quality, and the extent to which it is contributing positively or otherwise to the wider socio-economic context.
10. Expand the existing Clare County Accommodation Investment Strategy Toolkit and ensure that it addresses the gaps and deficiencies. The strategy should highlight: The investment opportunities as they relate to each area of Clare, including an overview of potential sites of interest and development opportunities, and the identification of potential iconic sites based on their location and surrounding environment. In particular, there is a need to address the lack of sufficient registered rooms that are graded at 4-star and above. Currently 61% of all registered rooms in Ireland are of this grade, while Clare has only 38% of its rooms in this category. Similarly, recognised gaps in RV camping facilities need to be addressed.
11. Develop the profile, experiences and infrastructure of Ennis as a core hub attraction and gateway to the county.
12. Accommodation and all related hospitality services are critical components of Ennis as a destination and need to be carefully assessed to ensure an appropriate range of price-points, quality assurance, and customer service.
13. Prioritise the implementation of recommendations in the forthcoming Ennis 2040 Economic and Spatial Plan that relate to regeneration of the town centre, with a particular focus on creating a strong sense of place, maintaining the integrity of heritage assets within the landscape and enhancing walkability.
14. Strengthen the orientation/gateway role of Ennis and ensure that the information needs of the visitor are adequately serviced, including through services provided by the accommodation sector, and through on-the-ground orientation signage.
15. Enhance its role as a hub through developing new opportunities to assist visitors with trip planning/booking and to facilitate extended stays.
16. Work with community partners to strengthen the role of towns and villages elsewhere as destination hubs, through identifying infrastructural issues that constrain tourism and encouraging an ongoing improvement of infrastructure and enhancement of the public realm.
17. Refresh the destination brand and adopt a thematic approach to marketing and communications that promotes the key themes, highlights sustainability as a core value of Clare as a destination, and is aligned with the regional propositions – Ireland’s Wild Atlantic Way and Ireland’s Hidden Heartlands.

1.4 ADDITIONAL SUPPORTING POLICY

Clare County Development Plan (2023 -2028)

The Development Plan sets out how the county will grow over the six year period of the plan. The Plan sets out the strategic vision for Clare as a place “where urban and rural communities enjoy a high quality of life, work practice choice, inclusivity and service access and so that the county is a dynamic, resilient, connected and internationally competitive location for innovation and investment and is a national leader in climate action, creativity, culture, heritage, tourism and environmental management”. Tourism plays an important role in the economy with the goal that tourism will continue to play a major role in the development of the county. Under the policy objective of Visitor Accommodation, the plans supports the development of facilities for Motorhomes and Campervans in both settlements and rural locations throughout the County.

Burren & Cliffs of Moher Visitor Experience Development Plan

The VEDP sets out a five-year plan for the development of tourism in the area with the overall vision to increase dwell time and inspire visitors and the next generation to become custodians of the Burren and Cliffs of Moher. The Plan identifies a number of challenges including the over reliance of day visitors, limited accommodation capacity, infrastructure and lack of visitor services and parking issues. The need to undertake an analysis of accommodation facilities is an enabling action of the Plan, identifying attracting investment in new facilities, and upgrade of existing facilities.

Cliff Coast Destination Experience Development Plan (Draft in Development)

The draft Destination and Experience Development PLAN (DEDP) is a five-year sustainable tourism development plan to support the development of unique and compelling experiences in West Clare and North Kerry. The plan focusses on achieving new levels of visitor engagement with responsible tourism alongside the development of authentic community experiences. Actions within the plan include identifying opportunities for accommodation development and undertaking a review of campervan sites to disperse visitors to rural communities.

Lough Derg Visitor Experience Development Plan 2020 – 2024

The plan sets out tourism development opportunities for the Lough Derg area, developed under the action areas of destination management, destination innovation, visitor experience and destination marketing. It is the ambition of the plan for visitors to explore the destination by slow tourism means using its network of interconnected land and water trails. The plan recognises the potential for alternative accommodation in the Killaloe / Ballina Destination Hub.

Renewed Clare Rural Development Strategy

This strategy sets out the pathway to revitalised and reinvigorated rural communities across the county. The plan is developed around 10 rural development strategy objectives including Building Social Enterprises, Cooperating Communities, Rural Way of Life and Building Tourism. In relation to Building Tourism, the strategy seeks the implementation of the County Clare Tourism Strategy.

1.5 TOURISM CONTEXT

Hotel accommodation is the largest accommodation type in the county, accounting for 75% of all rooms/units. The 45 hotels in the county provide a total of 2,580 bedrooms. Bed and Breakfast is the second largest accommodation type in the County. There are 62 registered properties providing 340 rooms, or 10% of rooms in the county.

Fáilte Ireland statistics show there are six registered caravanning and camping properties in Clare. These provide a capacity of 263 pitches, approximately 7.5% of rooms/units in the county.

Since 2022 and post pandemic a new operational challenge has emerged. The war in Ukraine has placed pressure on the tourism sector as the country has sought to provide accommodation for more than 85,000 people seeking temporary protection in Ireland since February 2022. Clare has one of the highest proportions of hotel accommodation under contract with the government to provide accommodation to those seeking both temporary protection and international protection.

As of March 2023, approximately 39% of hotel bedstock in County Clare was booked by the State for non-tourism purposes, compared with an overall 32% of hotel beds outside of Dublin. This reduced bedstock impacts on the level of visitors to County Clare based on room stock availability and pressures on pricing in available room stock in the rest of the county with demand considerably outweighing existing supply levels.

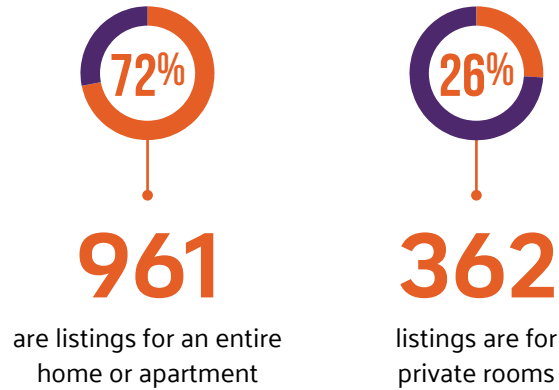
County Clare Registered Accommodation Profile

Clare Accommodation Profile	Properties	Rooms/ Units	Bedspaces
Hotel – 5 star	2	252	538
Hotel – 4 star	13	901	2,326
Hotel – 3 star	17	1,085	2,902
Hotel – 2 star	6	157	374
Hotel – approved	7	185	491
B&B	46	190	467
B&B (Welcome Standard)	16	150	342
Caravan & Camping	5	255	1,064
Camping (Welcome Standard)	1	8	35
Guesthouse	6	56	134
Hostel	3	-	176
Hostel (Welcome Standard)	2	14	89
Self-catering	125	125	736
Self-catering (Welcome Standard)	32	32	212
Glamping (Welcome Standard)	3	18	60
Activity Holiday Accommodation (Welcome Standard)	1	12	30
Total	285	3,440	9,976

(source: Fáilte Ireland Accommodation Supply 2023 dashboard)

County Clare AirBnB Accommodation Profile

As of June 2023 there are 1,334 listings in County Clare available through the AirBnB website.



The prevalent distribution of these properties is in towns, villages and rural settings aligned with the coastal communities across Clare following similar patterns for the locations of existing M&C provision in the county i.e. North and West Clare supply levels ahead of East and South Clare.



Source: insideairbnb.com (accessed June 2023)

TOURISM PERFORMANCE – COUNTY CLARE

County Clare	2019	2021	2022
Domestic Trips	571,000	261,000	590,000
Av. Length of Stay	2.7 nights	3.9 nights	3.0 nights
Revenue	€110 million	€72 million	€145 million

(source: Failte Ireland / CSO)

County Clare	2019
Overseas Visitors	701,000
Revenue	€160 million

(source: Failte Ireland / CSO)

Domestic Tourism

In 2022 Irish residents took 13.3 million domestic trips, staying an average of 3.0 nights per trip Total expenditure was €2.9 billion. This included 590,000 domestic trips to County Clare, representing 4.4% of all domestic trips within Ireland. Domestic visitors stayed an average of 3.0 nights in the county. Visitor expenditure amounted to €145 million. In 2022 the number of domestic trips to the county exceeded 2019 levels of 571,000 when total tourism revenue of €110 million was generated.

Overseas Tourism

Pre-COVID19 County Clare welcomed 701,000 overseas visitors generating tourism revenue of €160 million. The Wild Atlantic Way Regional Tourism Development Strategy estimates the overseas market will return to 2019 levels by 2026. In 2019, 15% of British visitors arrived into Ireland by sea, while 4% of mainland European visitors arrived by sea.

WAW 2019	Visitor Numbers	Revenue (€)	Average Spend per person	Average nights
Overseas	3.4 million	€1.9 billion	€ 551	6.9
Domestic	5.0 million	€1.1 billion	€ 210	3.0
Northern Ireland	0.6 million	€0.2 billion	€ 307	2.8

(source: Failte Ireland / CSO)

WILD ATLANTIC WAY TOURISM PERFORMANCE



SECTION 2

CAMPING AND CARAVANNING IN CLARE



2.1 SUMMARY OF CURRENT PROVISION

There are currently 15 camping and caravanning sites where paid overnight parking is available to M&C visitors. All of these facilities are operated by the private sector. Six of the locations are registered with Failte Ireland. Site charges are typically in the range of €20 to €28 per night, with one operator charging less than €20. There are 15 glamping facilities in the county.

The audit of M&C wild camping has found 39 popular overnight parking destinations and locations in the county where M&C visitors do not pay for overnight parking. The majority of these locations are in public car parks or roadside laybys. There are multiple locations in Lahinch and Kilkee M&C overnight parking occurs. These locations are not itemised in the overall total. In both towns promenade car parks are popular. However, overnight parking has been reported at numerous locations in the towns during particularly busy periods, including on-street parking outside private residences.

Wild Atlantic Way Clare - Registered Camping & Caravan Accommodation

County	Accommodation Type	Properties	Units/Pitches	Bedspaces
Clare	Camping & Caravanning	4	210	794
	Camping (Welcome Standard)	1	8	35
Wild Atlantic Way	Camping & Caravanning	46	3,396	14,604
	Camping (Welcome Standard)	14	414	1,468
Overall Total		60	3,810	16,072
Ireland	Camping & Caravanning	81	6,511	30,439
	Camping (Welcome Standard)	23	661	2,609
Overall Total		104	7,172	33,048

The Wild Atlantic Way region accounts for approximately 55% of registered camping and caravan pitches in Ireland. County Clare is placed 6th of 8 counties in terms of number of camping and caravanning pitches available, representing a 6.5% share. Kerry has the highest number of pitches while the neighbouring counties of Limerick and Galway sit below Clare in terms of camping and caravanning provision.

Current Provision in County Clare

Failte Ireland Registered Caravanning and Camping Sites	5
Failte Ireland Caravanning & Camping Site (Welcome Standard)	1
Other Caravanning & Camping Sites	9
Glamping Sites	15
M&C Wild Camping	
- Car Parks	21
- Lay-bys	7
- Other public/private areas	11
Total Sites	69

Ireland's Hidden Heartlands Clare - Registered Camping & Caravan Accommodation

County	Accommodation Type	Properties	Units/Pitches	Bedspaces
Clare	Camping & Caravanning	1	45	270
	Camping (Welcome Standard)	0	0	0
		1	45	270
Ireland's Hidden Heartlands	Camping & Caravanning	7	285	1,219
	Camping (Welcome Standard)	3	46	227
Overall Total		10	331	1,446

Ireland's Hidden Heartlands region accounts for approximately 5% of registered camping and caravan pitches in Ireland.

One property in Clare is located within the IHH boundaries. This site represents 14% of all camping and caravanning pitches available in the Ireland's Hidden Heartlands.

2.2 CAMPING AND CARAVANNING ACCOMMODATION PERFORMANCE

	WAW		Ireland's Hidden Heartlands		Ireland Overall	
	Pitch Occupancy	Guest Occupancy	Pitch Occupancy	Guest Occupancy	Pitch Occupancy	Guest Occupancy
*Jan - March 2022	N/A	N/A	N/A	N/A	N/A	N/A
April - June 2022	47%	37%	54%	44%	44%	32%
July - Sept 2022	66%	50%	67%	54%	65%	48%
April - Sept 2022	55%	42%	58%	42%	-	-

(Source: Failte Ireland Accommodation Occupation Surveys 2022)

The Failte Ireland Accommodation Occupation Survey outlines the occupancy levels in a range of accommodation types across the regional destination brands (e.g. WAW, IHH) on a quarterly basis.

Compared to the national performance, occupancy of camping and caravanning accommodation on the Wild Atlantic Way marginally outperformed ahead of the national occupancy rates in 2022. Over the peak period between July and September 2022, average pitch occupancy was 66% across the Wild Atlantic Way region, with corresponding guest occupancy at 50%. For the same period, pitch occupancy of 67% was recorded in Ireland's Hidden Heartlands with a corresponding guest occupancy of 54%. Nationally, average pitch occupancy of 80% was achieved in August.

Over the course of the season from April to September pitch occupancy in the Wild Atlantic Way was 55% compared to pre-Covid occupancy of 44% in 2019. Pitch occupancy in Ireland's Hidden Heartlands was 58% ahead of 51% recorded pre-Covid.

In the period from August to December 2021 the Wild Atlantic Way outperformed other regions in occupancy rates overall. It was reported that most operators in the sector closed from October for the year. No data was published for January to March 2022 due to the lack of operators open in the period.



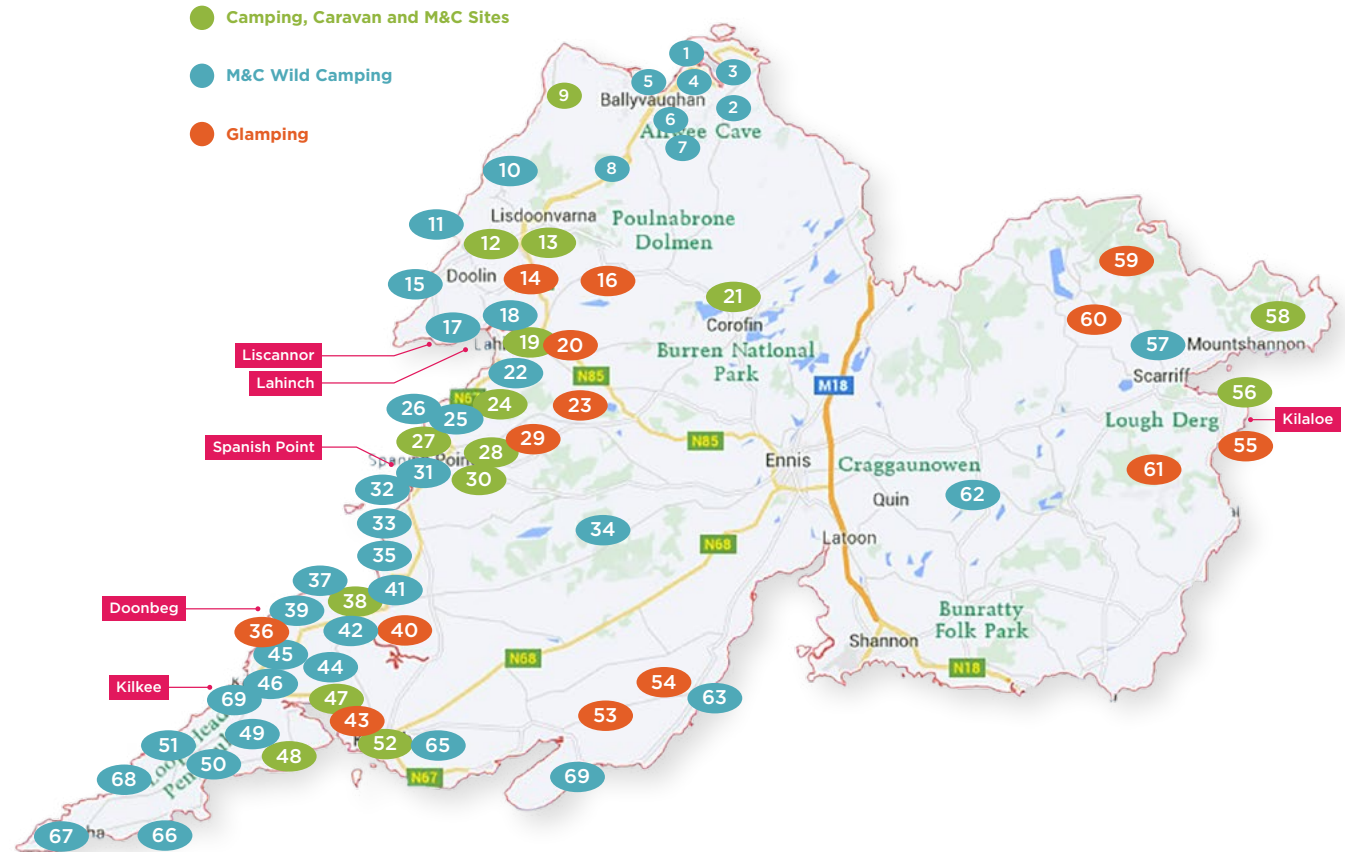
*Pitch occupancy refers to the dedicated space for a tent, caravan or motorhome/campervan. Guest occupancy refers to the number of bedspaces occupied on the site.

2.3 AUDIT OF EXISTING CLARE MOTORHOME AND CAMPERVAN PROVISION

Based on an audit of the registered and unregistered campsites, it is estimated there are a maximum of 400 pitches available for M&C, touring caravans and tents in the county. Approximately 70% of pitches are located along the coastline between Doonbeg and Ballyvaughan with two sites in the Doolin area accounting for approximately one-third of the county's capacity. Loop Head and East Clare each account for approximately 15% of capacity.

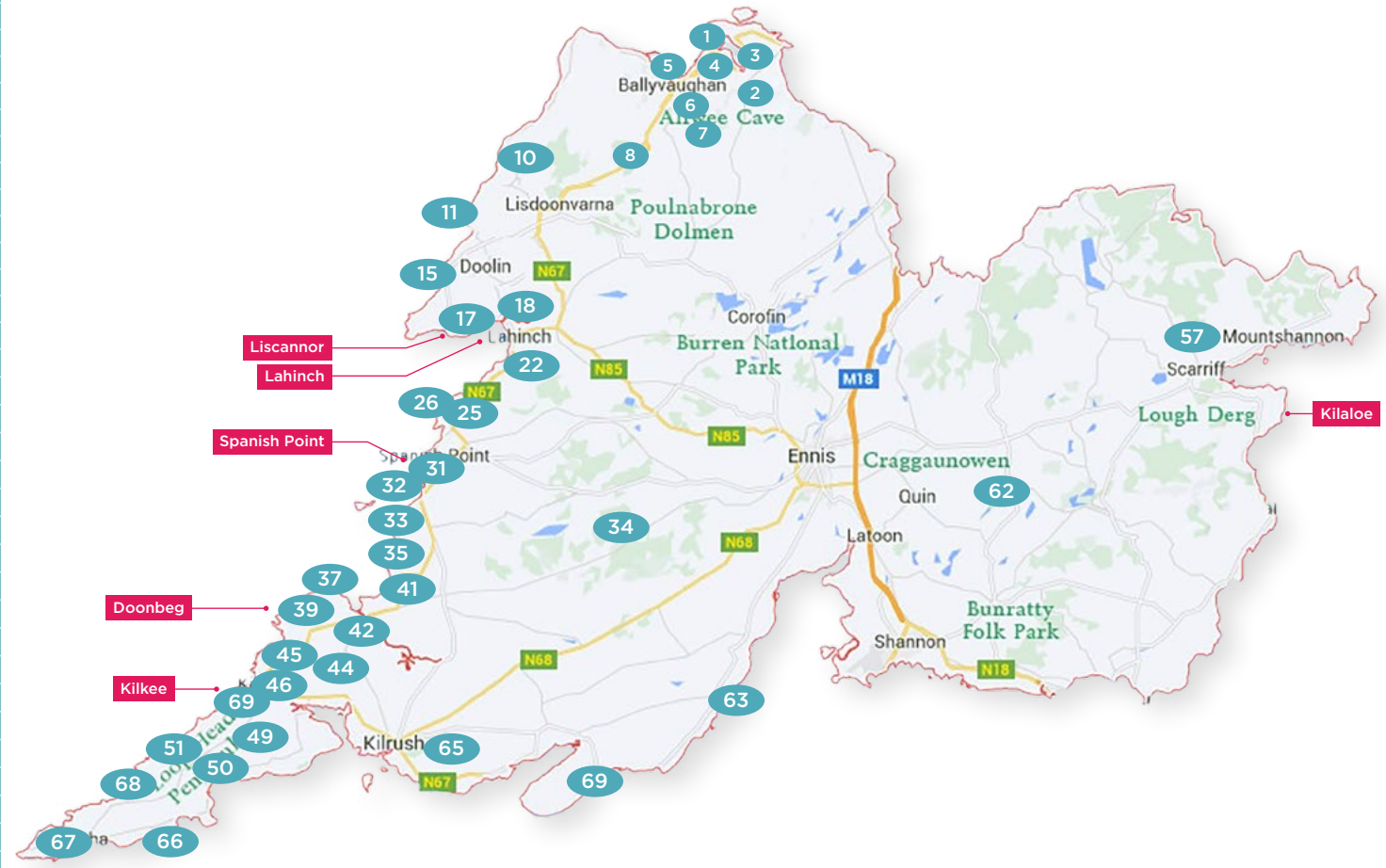
The assessment shows the prevalence of popular wild camping locations along the coastal areas of the Wild Atlantic Way. There is currently no provision for M&C in Ennis and the surrounding hinterland. This lack of provision extends north and south along the M18 corridor including Shannon, Bunratty and Sixmilebridge. In East Clare, there are existing campsites serving M&C visitors located close to Lough Derg in Ogonnoloe and Mountshannon. Wild camping by visitors is also evident in the Scariff area.

The mapping does not take into account wild camping associated with the annual programme of cultural and sporting events and festivals and taking place throughout the county which attract M&C visitors. Such events include the Lisdoonvarna Matchmaking Festival, the Ennis Trad Festival, Fleadh Nua and the SKODA Ring of Cycle. As an example of demand, the SKODA Ring of Cycle has annually attracted in the region of 60 M&C visitors staying overnight in Clarecastle GAA grounds.



M&C Wild Camping 39 locations

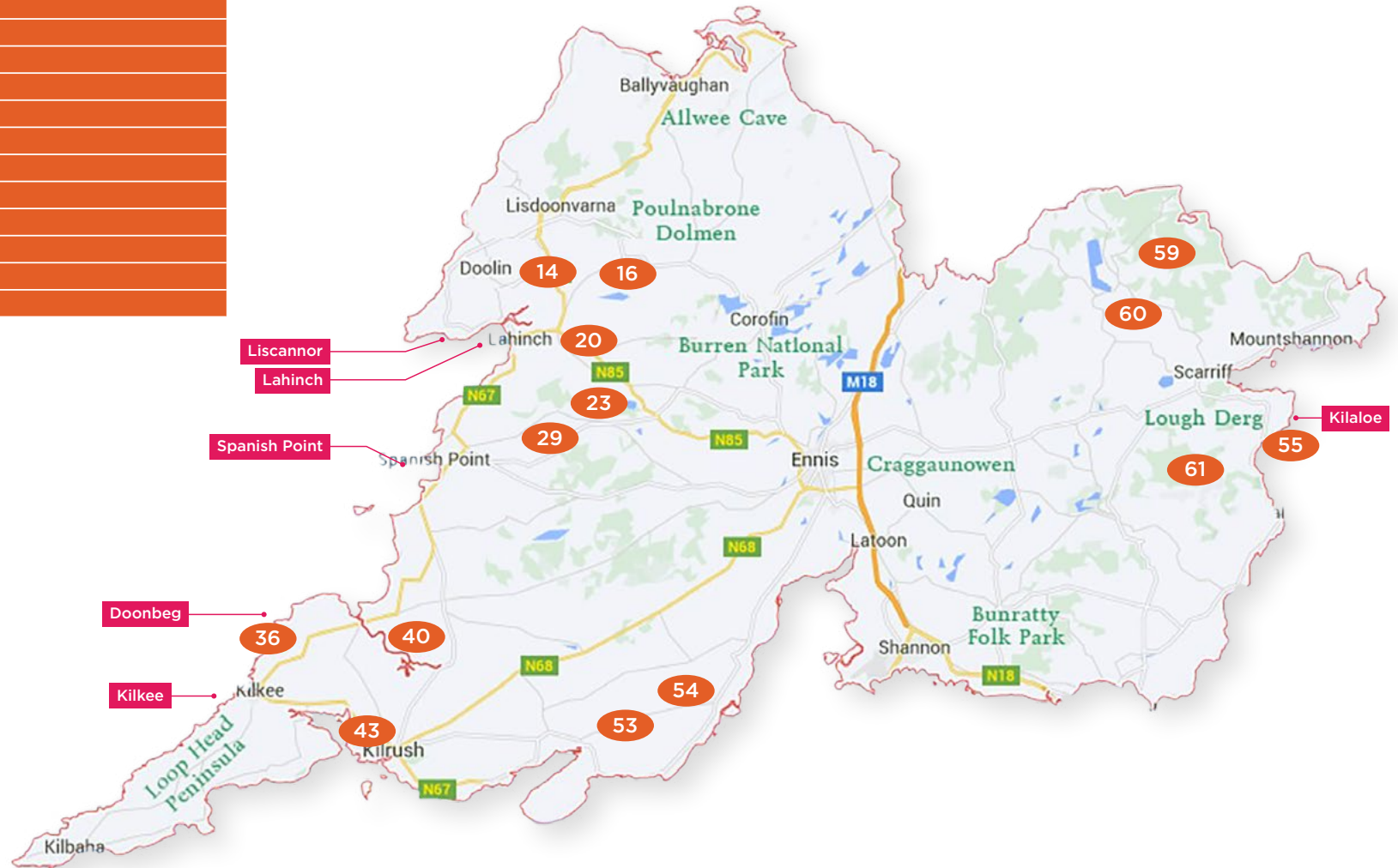
1. Bishop's Quarter (Car Park)
2. Bell Harbour (Lay by)
3. New Quay (Lay by)
4. Bay SUP Ballyvaughan (Lay by)
5. Ballyvaughan N67 (Car Park)
6. Public house in Ballyvaughan with space for Motorhome (Car Park)
7. Parking R477 - Ballyvaughan (Car Park)
8. Coast road between Ballyvaughan and Lisdoonvarna (Lay by)
10. Open Space between Doolin and Fanore (Lay by)
11. Carpark in Doolin
15. Cliffs of Moher Walk Car Park
17. Clahane
18. Liscannor Pier
22. Lahinch
25. Spanish Point Car Park
26. White Strand Miltown (Car Park)
31. Spanish Point
32. Quilty Pier (Car Park)
33. Parking Seafield Pier and Beach (Car Park)
34. Knockalough Lake Kilmihil (Lay by)
35. Doughmore Beach
37. White Strand Doonbeg (Car Park)
39. Kilkee Cliffs (Car Park)
42. Doonbeg Castle (Car Park)
44. Parking Querrin Quay (Car Park)
45. Parking Strand Road (Lay by)
46. Kilkee
49. Doonaha West Beach (Car Park)
50. Dolphin watch/castle parking Carrigaholt (Car Park)
51. Parking Carrigaholt Pier (Car Park)
57. Scariff Slipway Carrowmore (Car Park)
62. Cullaun Lake
63. Kildysart Quay
64. Labasheeda Pier
65. Vandeleur Woods Kilrush
66. Kilbaha
67. Loop Head Car Park
68. Bridges of Ross Car Park
69. Diamond Rocks Kilkee Car Park



GLAMPING SITES

15 Locations

14. Doolin Glamping
16. Burren Glamping
20. Castledarcy Glamping
23. Glamping Ivy Hill
29. Rainbow POD Glamping
36. Doonbeg Pods and Cottages
38. Strandcamping Doonbeg
40. Emlagh Pods
43. Floating Glamping Pods
53. Beds of Silk Glamping
54. Shannon Estuary Glamping
55. Killaloe Luxury Pods
59. Cúlú Fia Wild Glamping
60. Clare Ecolodge Feakle
61. Kilbane Glamping



CAMPING, CARAVAN and M&C SITES

15 Locations

9. Fanore Caravan Park
12. Nagle's Camping and Caravan Park
13. O'Connor's Riverside Camping and Caravan Park
19. Ocean View Park
21. Corofin Village Caravan and Camping Park
24. Tom Malones Pub Parking
27. Lahiff's Caravan and Camping Site
28. Eco Camping Glamping
30. Spanish Point Airfield
38. Strandcamping Doonbeg
47. Pure Camping - Eco Campsite
48. Green Acres Caravan and Camping Park
52. Kilrush Marina
56. Killaloe Camping Site
58. Lakeside Holiday Park Mountshannon



SECTION 3

MOTORHOME AND CAMPERVAN OPPORTUNITY ASSESSMENT



3.1 MARKET REACH

NATIONAL OWNERSHIP LEVELS

Motorhome and campervan ownership has grown significantly in recent years. In 2018 there were approximately 11,200 Motor Caravans* registered in Ireland on the National Vehicle and Driver File maintained by the Department of Transport. By April 2020, this number had increased to 12,600 with registrations accelerating during the COVID-19 pandemic to more than 16,000 by the end of 2021. As of March 2023, there were nearly 18,000 vehicles registered in Ireland. Ownership trends in Ireland are also reflective of the growing European levels of motor caravan ownership.

The European Caravan Federation (ECF)** report that in 2020 there were an estimated 2.4 million motorcaravans in use. Germany was the largest market with approximately 675,000 vehicles, followed by France (560,000) and the United Kingdom (250,000). Between 2021 and 2022 an additional 330,000 new vehicles were registered.

Market Growth – M&C Ownership Ireland	2018 11,200 registered	2021 16,000 registered
	2020 12,600 registered	2023 18,000 registered

European Market



*A motorcaravan is defined as a vehicle that must be constructed to include living accommodation which contains at least the following equipment: seats and a table, sleeping accommodation (which may be converted from the seats), cooking facilities and storage facilities.

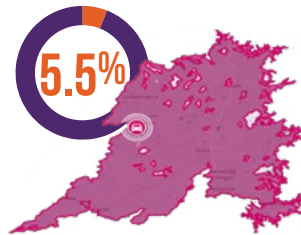
** (source www.e-c-f.com accessed June 2023)

3.2 DOMESTIC MARKET ESTIMATES

WEST CLARE CATCHMENT

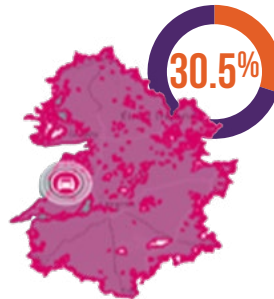
A journey of up to one hour from west Clare includes County Clare, Limerick City, and southern parts of Galway. The estimated % of motorhome owners within this reach is **5.5%**.

This is the equivalent of 988 motorhome owners within one hour of west Clare.



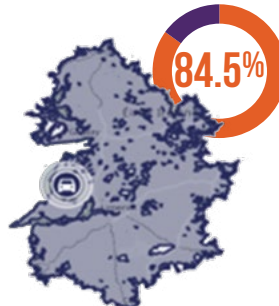
Areas within two hours of west Clare includes Clare, Limerick, Tipperary, North Cork (Fermoy, Mallow, Charleville, Kanturk, and Cork City North-West), North Kerry (Castleisland, Tralee, and Listowel), Galway, Laois, Athlone, Roscommon and southern parts of Mayo. The estimated % of motorhome owners within this reach is **30.5%**.

This is the equivalent of 5,481 motorhome owners within two hours of Lahinch.



A three hour catchment from west Clare covers Dublin and its surrounds, Cork, Kerry, additional parts of the midlands (Meath, Kildare) and Kilkenny/Carlow region. The estimated % of motorhome owners within this reach is **84.5%**.

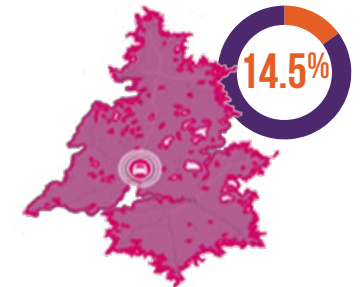
This is the equivalent to 15,185 motorhomes owners within three hours of Lahinch.



ENNIS & EAST CLARE CATCHMENT

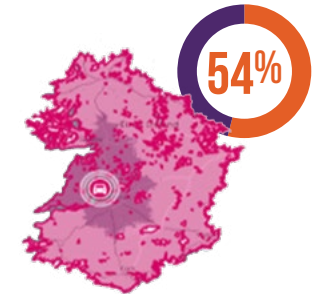
A journey of up to one hour from Ennis covers Co. Clare, Co. Limerick, Galway City, east Galway and parts of Tipperary. The estimated % of motorhome owners within this reach is **14.5%**.

This is the equivalent to 2,605 motorhome owners within one hour.



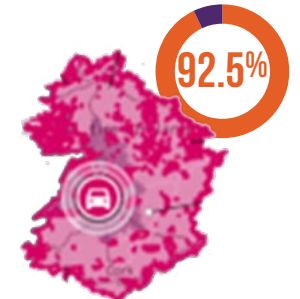
Within two hours of Ennis and east Clare includes Clare, Limerick, Galway, North Cork, North Kerry, Tipperary, Kilkenny, Carlow, the Midlands, Sligo and Mayo. The estimated % of motorhome owners within this reach is **54%**.

This is the equivalent to 9,704 motorhomes owners within two hours.



With a three hour journey the catchment includes Dublin and its surrounds, Cork, Kerry, Wexford, Donegal and Louth. The estimated % of motorhome owners within this reach is **92.5%**.

This is the equivalent to 16,623 motorhomes owners within three hours.



3.3 UNDERSTANDING THE VISITOR

VISITOR PROFILE

83% of visitors are on domestic trips. 13% are from Northern Ireland. Overseas visitors comprise 4% of Motorhome and Campervan visitors to the county.

More than one-third of overnight visitors are from the neighbouring counties of Galway (19%), Limerick (13%) and Tipperary (5%). A further 17% are from Clare. 12% of visitors make the journey down the M7 from Kildare (8%) and Dublin (4%). 9% of visitors are from Donegal.

3 in 10 visitors are aged between 56 – 65 years old. 28% of visitors are aged 36-45 years old, with 1 in 4 visitors aged between 46-55 years old. 13% of visitors are more than 65 years old. 2% of visitors are aged under 35.

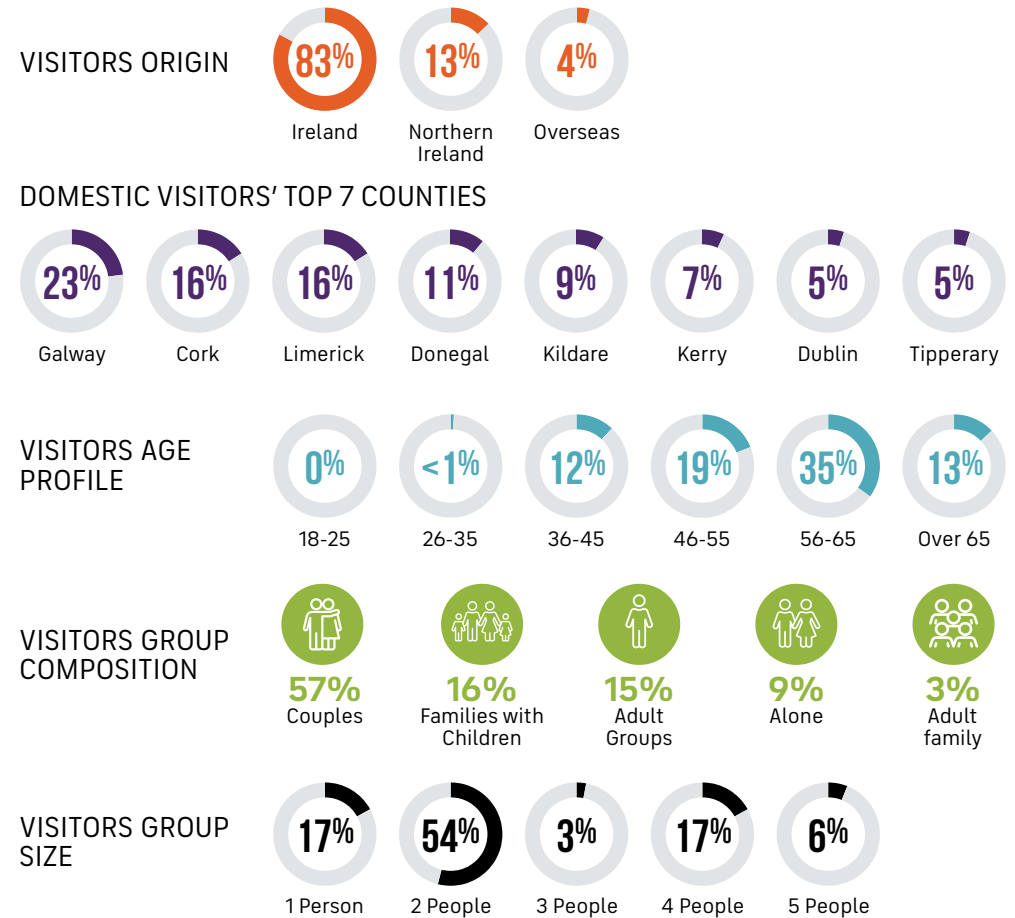
More than half (57%) of all visitors travel as a couple. Families with Children comprise 16% of Motorhome and Campervan travellers. 15% of visitors are travelling with friends. 1 in 10 (9%) visitors are travelling alone. Adult families comprise 3% of visitors.

Mirroring group composition, more than 70% of Motorhome and Campervan visitors are visiting as a couple (54%) or alone (17%). Groups of 4 comprise 17% of visitors, while groups of 5 make up 6% of visitors.

Note: A visitor survey was conducted in destination during April and May and within the networks of M&C owners to understand current visitor behaviour, facility requirements and motivations in selecting places to visit. A total of 158 replies were received through

a combination of interviews conducted in official campsites and wild camping locations at popular locations in the county (60 in person interviews). An online survey were issued to five motorhome and campervan clubs from across Ireland generating 100 submissions

from club members. The research examined travel behaviours and economic spend that were applied to develop the estimated current Motorhome and Campervan market for County Clare and economic value of the market.

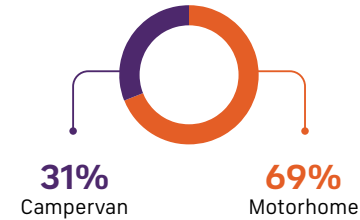


3.4 MOTORHOME & CAMPERVAN SURVEYS

VISITOR PROFILE

35% of visitor to the county were staying in fully self-sufficient Motorhomes. 65% were travelling to Clare in Campervans.

TYPE OF VEHICLE



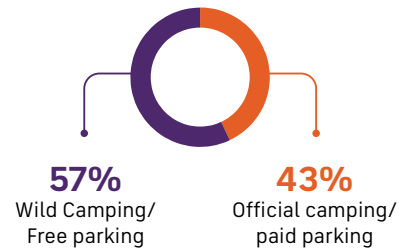
6 in 10 of Motorhome and Campervan were spending 2 nights in their motorhome on their current trip. 22% of visitors were staying 1 night. 13% of visitors were staying in their Motorhome or Campervan for 3 nights.

NUMBER OF NIGHTS ON THIS TRIP

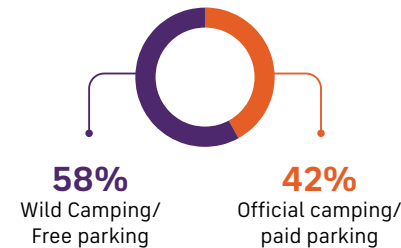


57% of visitors were not staying in a recognised campsite with no difference in overnight parking types recorded between Motorhomes and Campervans.

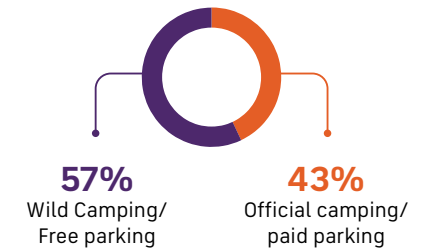
OVERNIGHT PARKING TYPE



CAMPERVANS



MOTORHOMES



3.5 MOTORHOME & CAMPERVAN SURVEYS

TRAVEL PATTERNS

35% of Motorhome and Campervan owners make a trip in their vehicle at least every two weeks. A further **35%** take a monthly trip in their vehicle. **18%** take a trip every 2 months. **8%** of respondents make between 3 and 5 trips in their Motorhome or Campervan in Ireland each year.

A quarter of Motorhome and Campervan owners visit Clare between 3 and 5 times a year. **1 in 5** visit Clare twice a year. **43%** of owners make an annual trip to the county. **6%** make at least one monthly trip in their vehicle to County Clare.

Half (**50%**) of Motorhome and Campervan owners will travel for 1-2 hours for a weekend break. **45%** travel for 3-4 hours for a weekend break. **1 in 20** will travel for more than 4 hours for a weekend break.

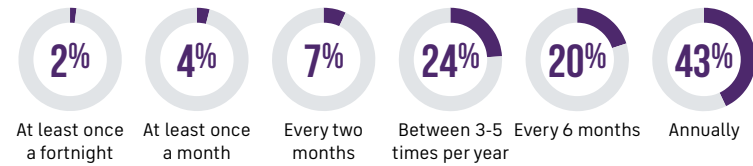
55% of Motorhome and Campervan owners will travel for 3-4 hours for a trip of three nights or more. **3 in 10** travel for 4-6 hours for a break of at least three nights. **8%** travel for 1-2 hours while **6%** travel for at least 6 hours.

85% of Motorhome and Campervan owners spend 2-3 nights in the one location on a longer trip with an equal distribution between 2 nights (**43%**) and 3 nights (**42%**). **1 in 10 (9%)** owners prefer to stay for 4 nights in one location.

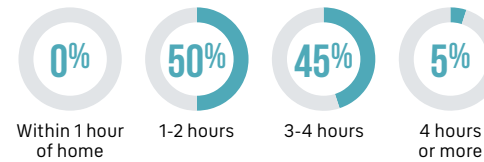
FREQUENCY OF TRIPS IN IRELAND



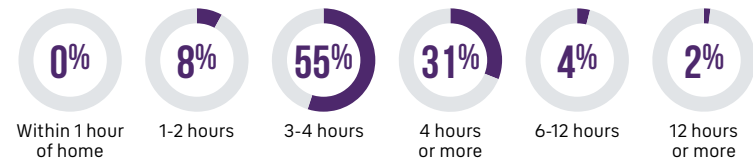
FREQUENCY OF TRIPS TO COUNTY CLARE



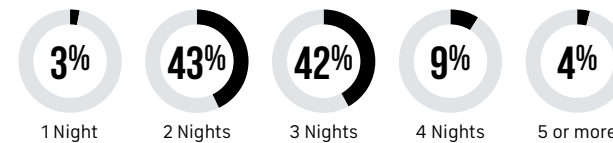
DISTANCE TRAVELED FOR A WEEKEND BREAK



DISTANCE TRAVELED FOR A TRIP OF 3 NIGHTS OR MORE



NUMBER OF NIGHTS IN ONE LOCATION ON A LONGER TRIP



Note: A visitor survey was conducted in destination during April and May and within the networks of M&C owners to understand current visitor behaviour, facility requirements and motivations in selecting places to visit. A total of 158 replies were received through

a combination of interviews conducted in official campsites and wild camping locations at popular locations in the county (60 in person interviews). An online survey were issued to five motorhome and campervan clubs from across Ireland generating 100 submissions

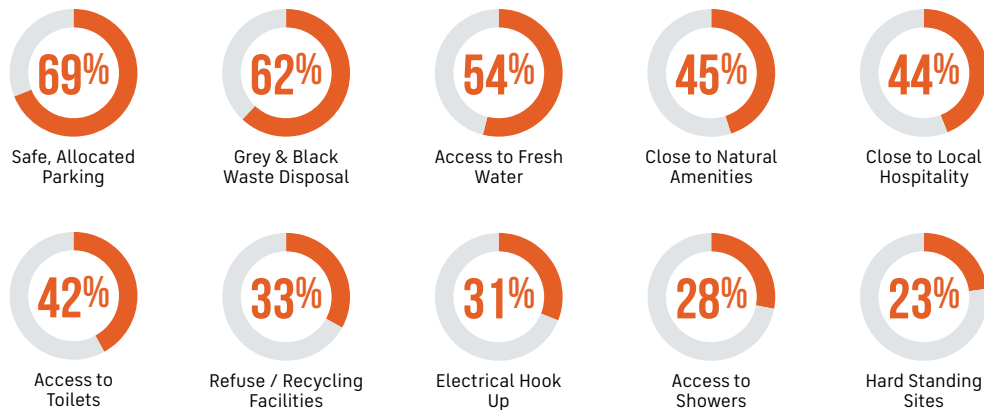
from club members. The research examined travel behaviours and economic spend that were applied to develop the estimated current Motorhome and Campervan market for County Clare and economic value of the market.

3.6 OVERNIGHT PARKING PLANNING

4 in 10 Motorhome and Campervanners split their overnight parking between official sites and wild camping. 17% of visitors always pre-book their stay on an official campsite. 13% will look for suitable parking when they arrive at their destination. 14% look for wild camping or free sites based on their own research (9%) or from recommendation shared on websites and forums. 10% are repeat visitors to an areas and know of the best locations to park overnight.

Split between official campsites and wild camping	41%
Always pre-book in an official campsite	17%
Pick a destination and find a suitable parking area when we arrive	13%
Generally return to same areas and know best locations	10%
Research wild camping or free sites	9%
Recommendations from forums and websites for wild camping or free sites	5%
Other	5%

MOTORHOME & CAMPERVAN VISITOR NEEDS



3.7 MOTORHOME & CAMPERVAN SURVEYS

TRAVEL PATTERNS

28% of Motorhome and Campervanners always stay on an official campsite. **68%** sometimes use official campsites for overnight parking. **1 in 20** never use official campsites on a trip in their vehicle.

More than a **one-third** of visitors (**36%**) always use a combination of official campsites and wild camping on a trip. **54%** sometimes use a combination of official sites and wild camping.

Nearly **two-thirds** (**63%**) of Motorhome and Campervan users sometimes use wild camping only on a trip. **27%** never go wild camping. **1 in 10 (11%)** always use wild camping on a trip.

OVERNIGHT PARKING PATTERNS

	Always	Sometimes	Never
Always stay in an official campsite	28%	68%	4%
Stay in a combination of official campsites and wild camping	36%	54%	10%
Use wild camping only	11%	63%	27%

More than 8 in 10 (82%) of visitors said they would use an Aire de Service facility if they were available in the area. An Aire de Service typically provides basic parking bays and waste disposal. **18%** would not use a local Aire de Service with **12%** indicated a preference for wild camping, and **6%** would prefer to stay in official campsites.

USE OF AIRE DE SERVICE FACILITIES

Yes	82%
No - Prefer to go wild camping	12%
No - prefer to stay in official campsites	6%



3.8 MOTORHOME & CAMPERVAN

VISITOR PRIORITIES

Top 5 Priorities for Motorhome Visitors



1. Safe, allocated parking



2. Grey and Black Waste Disposal



3. Fresh Water



4. Close to local hospitality and evening entertainment



5. Close to natural amenities

A motorhome has been considered to be a fully self-sufficient vehicle with all activities such as cooking and washing able to be performed inside the vehicle. Such vehicles typically have toilets and showers on board

Top 5 Priorities for Campervan Visitors



1. Close to natural amenities



2. Close to local hospitality and evening entertainment



3. Grey and Black Waste Disposal



4. Fresh Water



5. Access to toilets

with capacity to store fresh and wastewater for a number of days. Campervans typically do not have toilets and washing facilities onboard, requiring access to more facilities on a daily basis.

3.9 CONSTRAINTS AND CHALLENGES

PLANNING

The Clare County Development Plan 2023-2029 (April 2023, Interim) shows a number of locations where zoning for potential future motorhome and campervan provision has been made, including locations in Kilkee and Liscannor.

The Indicative Land Use Zoning Matrix in the Development Plan provides an indication of the types of development may or may not be normally considered or open for consideration on zoned lands. In respect of Caravan Parks/Camp Sites/Motorhome Parks (tourist use) and Glamping, land zoning that will be open to consideration include:

Will normally be acceptable in principle	Open to consideration	Will not normally be acceptable
Tourism	Mixed Use	Residential
	Existing Residential	Low Density Residential
	Community	Open Space
	Recreation	Buffer Space
	Agriculture	Enterprise
		Industry
		Light industry
		Maritime / Harbour
		Marine Related Industry

Any proposals for a Motorhome and Campervan facility would be assessed for planning permission based on its own individual merits in accordance with planning requirements.

A key consideration in the development of any Motorhome and Campervan facility is the disposal of wastewater from storage tanks in vehicles. Grey waste comprises water from sinks and showers, while black waste is used water from onboard toilets. Chemicals used in the toilets of many vehicles (black waste) may necessitate greater levels of treatment than typical mains sewer waste, potentially placing existing Wastewater Treatment Works (WWTW) under greater pressure when disposed of, particularly in larger volumes. In a number of locations around the county existing WWTW serving larger towns and villages are operating at, or close to, capacity. The County Development Plan notes ‘at present there are significant service and compliance issues in many existing wastewater systems in County Clare’. As with many other parts of Ireland, outside of serviced towns and villages most developments rely on individual septic tanks and proprietary wastewater systems.

In response to the growth of the campervan and motorhome market Scottish Water, Highland Council and the Scottish Environment Protection Agency has collaborated to produce Campervan and Motorhome Waste Disposal, A Guide for Independent Developments*. Depending on access to a sewer system, capacity of the WWTW and percolation rates of the ground on which the site is proposed, the document proposes four potential solutions for wastewater disposal:

- Direct connection to a public sewer for both grey water and black water
- Connection of grey water to a sewer and standalone collection tank for black water
- Soakaway for grey water and a standalone collection tank for black water
- Standalone collection facility for all waste to be tankered off site

<https://www.sepa.org.uk/regulations/water/septic-tanks-and-private-sewage-treatment-systems/>

BYELAWS

There are currently numerous parking bylaws in force in towns and villages across the county covering parking spaces, car parks and pay and display locations. Parking charges typically apply only during daytime hours with traffic wardens on duty during these periods. In other areas of the county where parking charges are not in force there is limited or no monitoring of parking by the local authority. The audit of popular overnight parking locations illustrates the wider geographic spread and range of parking spots used in both communities and rural areas than can currently be managed by existing seasonal or full time parking wardens. The enforcement of existing parking bylaws in relation to overnight parking, will require an increased level of resourcing. Any expansion of bylaws to preclude overnight parking in other areas would require further resources.

ENVIRONMENTAL

County Clare contains areas of some of most sensitive wildlife habitats and natural landscapes found in Ireland with an extensive range of protected sites located across the county comprising:

- 37 Special Areas of Conservation
- 10 Special Protection Areas
- 13 Natural Heritage Areas

Internationally recognised geological and hydrological features found in areas such as the Burren may present constraints to development, while other locations including the Shannon estuary, Lough Derg and the North Clare coast each retain SAC status.

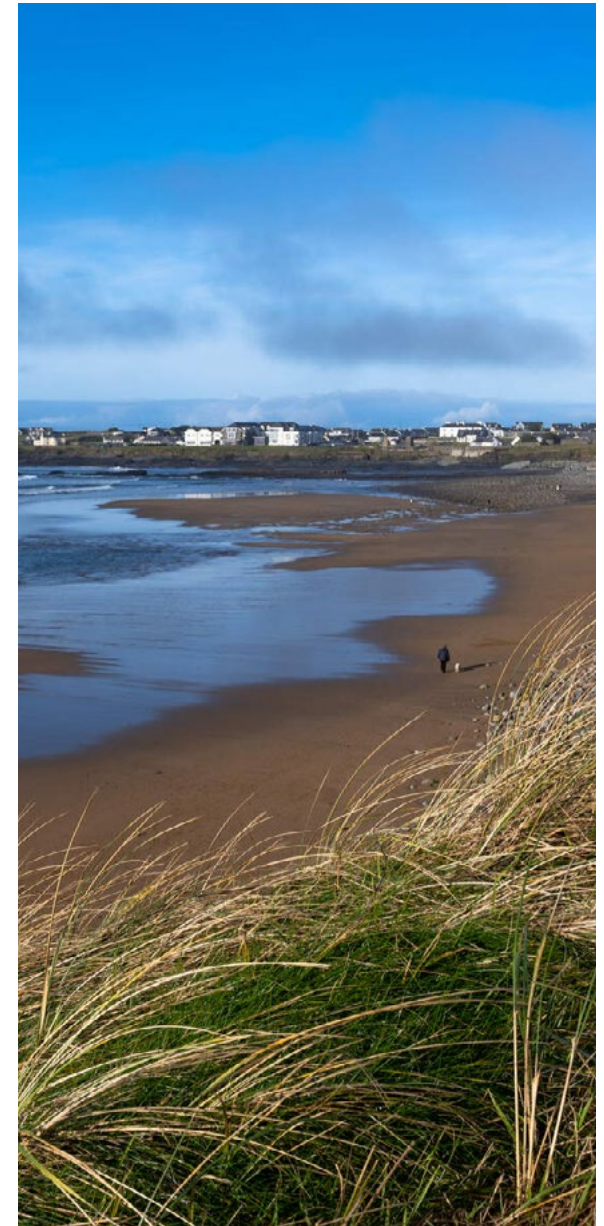
Outside of existing camping and caravan sites, the current lack of wastewater disposal locations contributes to the inappropriate disposal of used water by motorhome and campervan visitors creating environmental and social impacts. Feedback received as part of the consultation process has highlighted disposal of waste via surface water drainage networks in towns and villages has led to complaints from residents and businesses. In rural areas, reports have been received from landowners who have found wastewater disposed of into fields used for grazing animals.

VISITOR FLOWS

The programme of research undertaken illustrates the pattern of motorhome and campervan visits towards the coastal areas of the county. Ennis acts a visitor hub for tourism to other parts of the county. The absence of M&C facilities in the town is a key constraint for tourism development in the town and surrounding communities and a significant limitation to attract visitors who are subsequently motivated to explore the wider Clare destination.

MARKET FAILURE

In areas of the county there has been a market failure with limited private sector supply outside of well trafficked tourism destinations within Clare. This has resulted in the absence of facilities in Ennis and the M18 corridor with limited facilities in east Clare. Subject to not competing with the existing private sector operators in the county these area will require some immediate interventions in terms of facility supply or incentive for private sector engagement.



SECTION 4

INTERNATIONAL BENCHMARKING



LEARNINGS FROM INTERNATIONAL RESEARCH

- Social enterprise/community groups provides the opportunity to generate revenue for a local community and generate economic benefits to the local economy. Development by such organisations, particularly in rural areas, removes maintenance and operation obligations from the local authority and associated resource deployment.
- The Distribution of service points as shown in New Zealand and Scotland supports a wider network of parking locations where appropriate waste disposal is not achievable. The development of similar service points in Clare where discharge of wastewater can be achieved within existing sewage systems may support the provision of overnight parking-only sites in unserviced and/or more environmentally sensitive locations.
- There is a commonality in limiting the length of stay by M & C in one location. A maximum duration of stay reinforces the temporary nature of the parking sites and not facilitating long term camping behaviour in the location. The maximum length of stay approach also supports the dispersal of visitors to other locations across the destination.
- Management and monitoring of un-attended facilities by a warden or ranger role supports and encourages visitor compliance with local byelaws and visitor guidelines.
- A strong online presence enables potential visitors to plan their trip across the destination aligned with the ethos of the destination.
- There are a number of proven models enabling short term / overnight stays linked to artisan producers provision of M & C parking in their premises ensuring a greater dispersion of visitors across the area.



SOCIAL ENTERPRISE

CAERLAVEROCK, SCOTLAND

The north coast of the Solway Firth contains a number of environmentally sensitive areas including National Nature Reserves, Special Protection Areas, SACs and SSSIs. The Caerlaverock NNR stretches for 16km along the coast is a haven for wildlife including large bird populations. The nearby Caerlaverock Wetland Centre operated by Wetland Wildlife Trust provides an educational visitor experience for visitors to the area. Also in the area, Historic Scotland maintain and operate the medieval Caerlaverock Castle (temporarily closed to the public).

In Glencaple village (approx. pop. 800) the local Community Association has created motorhome parking for visitors within local community amenity and car park area. Overnight parking is allowed from 9pm - 9am with a request that spaces clear during day for local businesses. There is space for approx. 5 large motorhomes immediately adjacent to local hotel and café. Public toilets are also available in car park.

Dedicated motorhome parking has also been developed at Castle Corner on the Caerlaverock Estate. Facilities in line with continental 'aires' sites have been provided including:

- Litter disposal
- Drinking water tap
- Grey waste disposal
- Chemical waste disposal
- Camping not permitted
- Requests for 1 or 2 night stay only

In both cases parking is free. Donations are invited with honesty boxes on-site or via donation tab on local website.

HAWICK, SCOTLAND

The historic town of Hawick (pop. C.15,000) is the largest town in the Scottish Borders. The town was renowned for its textile and wool industry, in particular the use of cashmere and tweed. The town retains its history with a textile museum and number of producers offering visitor experiences. In 2012 the Hawick Welcome initiative was created to encourage and welcome visitors to the town. Visitors were met by locals who welcome them to the town and provide information on attractions and activities the town has to offer. Part of this project was the Hawick Campervan Welcome, providing dedicated free campervan parking for 24hours in a public car park in the town. On opening access to toilets and fresh water was provided.

The Southern Uplands Partnership Report states that nearly 400 vehicles used the amenity over the 5 month period from May to September 2019. The report notes anecdotally from local businesses that 'our visitors can spend considerable sums of money when they arrive.' Online reviews by Motorhome and Campervan visitors highlight the welcome they receive in the town and commend the local authority for providing dedicated and convenient overnight parking in the town.

The aire has since been enhanced to provide black and grey waste disposal. A contribution towards the cost of the installation was donated by a campervan group in appreciation of the facility provided.



Image credit: Caerlaverock Community Association

SOCIAL ENTERPRISE

BARROW VALLEY ACTIVITY HUB, GRAIGUENAMANAGH

Operated by Barrow Valley Community Development CLG, the centre has been developed as a hub for outdoor activities in the local and wider area. It subsequently sought planning permission to develop capacity to accommodate M&C visitors operated as a social enterprise.

The complex located next to the River Barrow provides an indoor venue for community use and hire with changing rooms, kitchen and storage facilities and is at the meeting point for a number of local walking trails.

Outdoor green space has been developed to generate revenue through overnight parking for motorhomes and campervans at a basic rate of €12 per night. Selected parking is also available with electric hook up at an additional €5 per night.

The facility has been estimated to generate approximately €1.5 million annually in direct visitor spend for the local economy.



Image credit: Barrow Valley Community Development

GEOGRAPHY MANAGEMENT

NEW ZEALAND

The Department of Conservation (DoC) is the government body responsible for the preservation of the country's natural and historic heritage. Part of the DoC remit is the conservation and management of public conservation land which accounts for more than 30% of land in New Zealand.

The DoC manages a network of more than 250 vehicular accessible campsites throughout the country. Campsites vary from basic level of provision with very limited facilities to serviced sites including electricity, toilets and showers and kitchens. Advanced booking is required in some instances, while other sites operate on a first-come first-served basis.

In the network, 167 of the sites are identified as having access suitable for campervans and caravans. 87 of these sites are bookable in advance, 33 are free-of-charge. Only five DoC campsites provide facilities for the disposal of black and grey waste.

'Freedom camping' (defined by the DoC as overnight camping in a public area that is not a campsite) on public conservation land is permitted subject to a number of exclusions including DoC nature reserves. In some locations freedom camping is only permitted in certified self-contained vehicles.

Local councils provide public 'dump stations' in many towns where campervan visitors can empty black/grey waste and refill fresh water supplies free of charge. Some locations also facilitating refuse and recycling facilities. In addition to council-maintained facilities, dump stations are also located in private campsites, community centres and commercial outlets such as fuel stations and supermarket car parks. Rankers Camping NZ maps the location of more than 180 public dump stations in the country.

The New Zealand Motor Caravan Association runs a Motorhome Friendly programme which can be applied for by destinations providing the following facilities:

- Council owned public dump station
- Provision of potable water at public dump station
- Legally compliant Freedom Camping bylaws
- Refuse and recycling location
- Access to medical facilities
- Grocery outlet
- Vehicle service

There are currently 58 destinations accredited under the programme. Accredited destinations are promoted on the NZMCA website, highlighting trails, local events and details of nearby attractions.

GEOGRAPHY MANAGEMENT

LOCH LOMOND AND THE TROSSACHS NATIONAL PARK

Loch Lomond and the Trossachs National Park covers an area of more than 1,800sq km. Loch Lomond is the largest lake in the UK, and the National Park includes more than 20 Munros (mountains over 3,000 ft high) including Ben Lomond, the most southerly Munro. Located in proximity to the Glasgow and the wider central belt, the National Park attracts more than 3 million visitors each year.

The National Park implements Camping Management Zones in defined areas of the park from March to September during which time bylaws are in effect covering camping and firelighting. The permitted areas are intended to provide a ‘wild camping’ experience and there no formal facilities in place. As part of this initiative camping permits allow overnight motorhome parking at three specific locations within the CMZ. Enforcement of camping permits is undertaken by park rangers.

Permits cost £4 per night with stays of up to three nights permitted. The permit does not guarantee a specific space. Permits can be purchased online up to four weeks in advance via the National Park’s website which also contains orientation, advice and guidance for visitors.

A motorhome disposal point for chemical waste is centrally located in the National Park in the town of Tarbet. Use of the disposal point is by donation, contributing to towards maintenance. Other privately-operated campsites within the national park also cater for motorhomes and campervans.

STAY THE NIGHT – FORESTRY LAND SCOTLAND

This scheme was initially trialled at a number of locations in 2020. It has expanded in subsequent years and continues to operate for 2023.

FLS permits campervan and motorhome overnight parking at 41 of its car parks throughout Scotland between 1 April to 31 October. Capacity at each location is typically between one and eight vehicles with spaces allocated on a first come-first served basis. Parking is only available to self-contained motorhomes and campervans (with all facilities including toilets inside the vehicle). Tents and car-camping is not permitted. No toilet facilities or waste disposal facilities are provided.

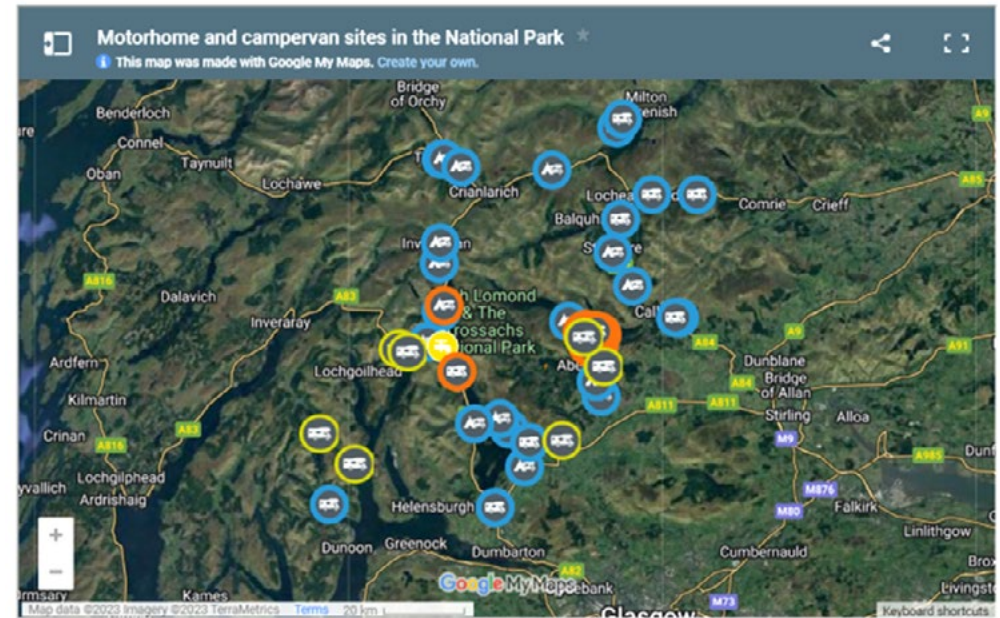


Image source: Loch Lomond and the Trossachs National Park website

Visitors are permitted to park for 1 night between 6pm to 10am with return visits to the same location prohibited for 48hrs. Pre-booking and advance payment are not permitted. A fee of £7 per night is payable on arrival at the chosen location with payment via telephone or a third-party phone app. Delayed payment of up to three days is permitted to allow for potential lack of network coverage in rural areas.

The scheme was delivered in response to existing unpermitted overnight parking in forestry carparks and seen as a means to distribute visitors from other busy ‘honeypot’ locations. It also provided a means to formalise and set guidelines for parking, with locations visited by FLS seasonal rangers.

The FLS website provides mapping and visitor information for each car park enabling visitors to pre-plan their journey and overnight stops.

GEOGRAPHY MANAGEMENT

DONEGAL

Donegal County Council has supported the development of a network of five service points throughout the county for motorhome and campervan visitors. Each location offers as a minimum free disposal of wastewater. In 2022 the local authority developed a caravan, camping, campervan and motorhome facilities grant scheme for voluntary organisations, not-for-profits and community groups to increase the number of overnight accommodation facilities for the sector. Grants of between €5k and €20k for up to 75% of the total cost were available for expenditure such as signage, site markings, site improvements, ground works for new spaces, black and grey water disposal, charging points and lighting. Each location had to provide for at least four overnight fee-charging spaces.

The local authority has also published a code of conduct for camping and caravanning visitors targeting visitor considerations in respect of element such as local facilities, parking, the environment and landowners.

Buncrana Service Point is adjacent to the town’s tourist office. Parking is available for up to eight motorhomes, three of which have electricity connections (EHUs). Parking, water supply and Wi-Fi are free of charge. Electricity is provided at a nominal charge with electricity cards available to purchase in the tourist office and adjacent petrol station.

Cardonagh Service Point. Cardonagh is located approximately 20km south of Malin Head. The service point located in a car park in the town provides for two campervans between 6pm and 9am.

Each unit provides electricity, drinking water and disposal of wastewater. Each unit is token operated costing €12 per unit. Tokens can be purchased in a number of local businesses identified with an ‘Aire de Service’ sticker in their shop window.

Falcarragh Service Point. Falcarragh is situated in the Donegal Gaeltacht on the WAW approximately 5km from Tramore beach. The service point is located in a car park in the centre of the village providing black and grey water disposal.

Maghera Service Point – Maghera is a small community on the west coast of the Rosses area of Donegal approximately 8km west of Dungloe. The service point provides wastewater disposal in situated within the car park of a local community centre and adjacent to the local pub. The community centre is also the base for Maghera Coastal Adventures which offers a range of water and land based activities. (Maghera Coastal Adventures is a joint collaboration between the Maghera community, Donegal Sports Partnership, Sports Ireland and is funded by the Dormant Accounts Fund).

Magheroarty Service Point – The service point is located at Magheroarty Pier – a Wild Atlantic Way Discovery Point and ferry for the Tory Island ferry. The service point provides wastewater disposal.



GEOGRAPHY MANAGEMENT

FIVE FOOT WAY CAR PARK, COBH, CORK COUNTY COUNCIL

The Motorhome specific facility in Cobh is located on the quayside adjacent to the cruise line dock. The facility offers 30 dedicated bays within the car with access to black and grey waste disposal and fresh water. Adjacent public amenities include a toilet, playground and looped walks. The location is also close to Cobh railway station and a short walk to a range of attractions, hospitality and offerings.

There is a charge of €10 per night for overnight parking via the car park ticketing machine. A maximum stay of two nights is permitted. In early 2023, a consultation process commenced to introduce new bylaws to support enforcement of existing overnight parking regulations. Proposed new bylaws will support wardens in enforcing payment and include no return to the car park for 72hours to encourage dispersal of visitors to other areas.

Where car park revenue may typically be sent to central local authority income, revenue generated from the Motorhome facility is ringfenced for the local area. In previous years revenue has contributed to playground upgrades and resurfacing of the car park.



DUNGARVAN COIS TRA PUBLIC CAR PARK - WATERFORD CITY & COUNTY COUNCIL

Nine spaces were developed in 2021 with a service area providing grey and black water disposal and drinking water. Overnight parking is available year-round for a maximum two-night stay, charged at €10 per night via a parking machine. The amenity is located a short distance from the popular Waterford Greenway. The local authority has prepared Parking By-laws in respect of the site.



MARINA FACILITIES

PORTUMNA CASTLE HARBOUR – WATERWAYS IRELAND

Shared marina berth and campervan aire facility on the shore of Lough Derg adjacent to Portumna Castle. The site is approximately 1.5km from the centre of Portumna.

Facilities are designed to accommodate an overnight stop/short stay with basic parking facilities for €10 per night. There are additional charges for electricity hook up, showers, laundry and waste disposal. Toilet access is provided free of charge. Payment for services is made through smart card units which can be purchased in Waterways Ireland offices or at outlets along the Shannon.



Image source: vanhalla.ie

BANTRY HARBOUR MARINA AIRE

The Bantry Harbour Aire is located in the car park in the marina in the town.

Parking is controlled by an automatic barrier with charges of €20 for 24 hours. Services on-site include fresh water, wastewater disposal, wifi and electricity hook ups. General waste is charged at €4 per bag. There are no showers on-site, local agreement is in place for use of showers at an adjacent hotel for €3 per person.

A similar facility is in operation at **Kilrush Marina**, where 8 spaces are available throughout the year. There is a charge of €25 per night with facilities including electricity supply, water connections, toilets and showers, black and grey water disposal, general and recycling waste. Bookings can be made through the marina's website.



Image source: Bantry Bay Port Company

PRIVATE SECTOR

NEVIN'S NEWFIELD INN, BY MULRANNY CO. MAYO

The business owner included motorhome facilities as part of the redevelopment of the car park to the rural bar, restaurant and B&B on the N59 between Mulranny and Newport. The car park includes space for 7 motorhomes with water and electricity connections provided. There is a fee of €15 per vehicle per night.

FRIEL'S BAR & RESTAURANT, SWATRAGH, CO. DERRY/LONDONDERRY, NORTHERN IRELAND

Swatragh is a small village in Mid Ulster 8km off the main A6 Belfast to Derry/Londonderry Road. It is approximately half way between Belfast and Derry/Londonderry and 25km south of Coleraine and the coast. The long-established bar and restaurant has developed a Motorhome Park offering fresh water, grey and black waste disposal, toilets and showers, and electrical hook ups for £20 per night.

DICK'S FIELD, ARDMORE, CO. WATERFORD

Dick's Field Motorhome Park is situated just outside the town of Ardmore at the end of a long hard core finished drive. The landowner has enhanced the field by putting in some water and sewerage facilities for motorhome users. The price of an overnight stay is €15. In exchange for the nightly fee, visitors get access to fresh, grey and black water facilities and access to the field. A small number of electric hook-ups are also available for an additional charge.

Dick's Field, as well as providing good value motorhome accommodation, is suitably located for motorhome users too. The town of Ardmore is an attractive place to spend a few days, and the field is located within close proximity of the town, the beach and the cliffs. A number of rules and regulations have been implemented to enhance the visitor experience. These include a noise curfew at 10pm and a no-tent / no caravan rule.



Image source: Nevins Newfield Inn



Image source: Visit Ulster



Image source: KamperFan

DESTINATION INNOVATION

France Passion

This is a scheme where farmers, wine growers, cider makers, cheese makers, artisans etc. allow motorcaravan owners to stay overnight on their property free of charge. In exchange, the motorcaravan user may buy some local produce. The France Passion concept was invented in 1993 when the editor of a wine magazine noticed that more and more motorhomes were exploring the winegrowing regions of France. He realised that it was not easy for them to find a safe place to park overnight in these rural areas. Today in its 30th year, the France Passion concept is available in 91 departments, on over 2,100 properties, mainly winegrowers, farmers, tradesmen/women, farmhouse inns and fellow motorhome owners.

It is estimated that they provide over 10,000 overnight parking spaces. The principle is that these hosts invite motorcaravan users onto their sites for up to 24 hours. The France Passion website also advertises an annual kit for €30. This kit includes a stopover guide with 27 regional maps, directions to stopover sites, information on host's activities and produce, indications on which hosts provide meals, and photos of stopover sites.

Winzeratlas - Germany

The Winzeratlas concept is aimed at targeting motorcaravan owners who are wine connoisseurs. It contains parking spaces at selected winegrowers and besen farms. Visitors can park at the winegrower's site for 24 hours free of charge. There are currently 200 winegrowers that are part of Winzeratlas. Visitors who wish to avail of their services must purchase membership and in return they receive a vehicle vignette that they place on their windscreen, allowing them access to overnight parking at a company listed site.

Okay2stay, New Zealand

Okay2stay was set up by a retired couple who travel throughout New Zealand in their motorhome, visiting their Okay2stay hosts, updating their listings, and finding new

hosts to add to the network. Currently, they provide over 100 unique locations where motorcaravan users can buy local food and wine and park their motorhome overnight for free. Okay2stay hosts are mainly small producers who welcome members travelling in self-contained motorhomes to park overnight on their properties for one night free of charge. As a 'thank you' for their stay, members visit their host's tasting room or small shop and make a purchase – a bottle of wine, delicious artisan cheese, or perhaps a meal in the onsite cafe. Hosts offer a range of unique places to stay, including vineyards, olive groves, cheese makers, lavender farms, orchards and berry farms. There are also small breweries, rural cafes and restaurants. Motorcaravan users can sign up to become a member of Okay2stay online, where they'll receive full host details and maps and be able to see host reviews.

Brit Stops, UK

Brit Stops is a network of farm shops, pubs and vineyards that invite motorhomes to stay for one night free of charge. There are more than 1,100 stopover locations across the UK and Ireland offering free 24 hour accommodation. They are passionate about their local produce and believe the more visitors they have the better chance they have of spreading the word about fresh, sustainable produce. Each site is different, and many sites will have no facilities other than parking. Motorcaravan users can become a 'Britstopper' for £39. Membership provides them with access to all the hosts' information, as well as maps to find places to stay.

Pintrip, Denmark

Pintrip is a travel and experience guide that offers micro-experiences and pitches for motorhomes, roof tents and caravans at more than 300 Pintrip hosts throughout Denmark. Hosts vary from farm shops, small museums, breweries, visitor gardens and dairies. Motorcaravan owners can purchase membership that allows them to park for free at a host's site for up to 24 hours. The 300 Pintrip hosts throughout Denmark offer more than 750 stops. The developer of Pintrip based their concept off the France Passion concept. This type of experience is growing across Europe and internationally.

SECTION 5

IMPACT ASSESSMENT



5.1 M&C MARKET IMPACTS

The programme of primary research undertaken included an assessment of visitor expenditure and patterns of stay i.e. length of stay and tourism impact designed to assess the economic impact of M&C activity for Clare.

MARKET ESTIMATE

There is an estimated 32,400 M&C vehicles currently visiting County Clare generating 163,000 visitor bednights annually. Total expenditure by M&C visitors to County Clare is estimated at €7.5 million per year.

These estimates are based upon the frequency of visits to the county by domestic, Northern Ireland and overseas visitors. There are an average of 2.4 visitors in each vehicle, staying on average for 2.1 nights per trip. The figure does not include motorhome owners from County Clare who are travelling within the county.

DAILY EXPENDITURE

Daily expenditure in the destination by visitors was assessed across four elements:



OVERSEAS AND NORTHERN IRELAND MARKET

Visitor surveys undertaken during April and May 2023 as part of the study indicate that 13% of M&C visitors are from Northern Ireland, with a further 4% from overseas. Applying these proportions to the domestic market suggests a Northern Ireland market of approximately 2,300 vehicles per year and Overseas market of approximately 700 vehicles per year. Consultation with local industry suggests that domestic visitors comprise between 70%-75% of visitors. Visitors from Northern Ireland were in the range 10-15%, with overseas visitors also in the 10-15% range.

Failte Ireland/CSO statistics for 2019 illustrate that of 3.6m million European visitors, 1% are using camping or caravanning accommodation on their visit to Ireland. Statistics for 2017 show that 7.8% of European visitors visited County Clare. On this basis it is assumed that the maximum mainland Europe market for M&C visitors to the County is approximately 2,800 international visitors or 1,200 overseas vehicles annually.



32,400

Total Annual M&C Vehicles visiting County Clare



68,000

Total Annual Vehicle Nights



41,000

Total Annual Wild Camping Vehicle Nights



163,000

Annual Visitor Bednights



€7.5 MILLION

Annual Direct Expenditure



€10.3 MILLION

Total Economic Impact

VISITOR EXPENDITURE PATTERNS

M&C ACTIVITY IN CLARE



Direct Expenditure

€7.5 million per year



Total Average Local Expenditure per Vehicle

€110 per Day



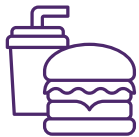
2.1 nights

Average length of stay



2.4

Average visitors per vehicle



Daily Food and Drink Spend

€70



Daily Groceries Spend

€22.50



Overnight Parking / Accommodation Spend per trip

€21.50



Evening Entertainment Spend

€26

Visitors spending on Food and Drink



Visitors spend locally on Groceries



Visitors currently pay for Overnight Parking



Visitors spending on Evening Entertainment



5.2 GROWING THE ECONOMIC VALUE OPPORTUNITY

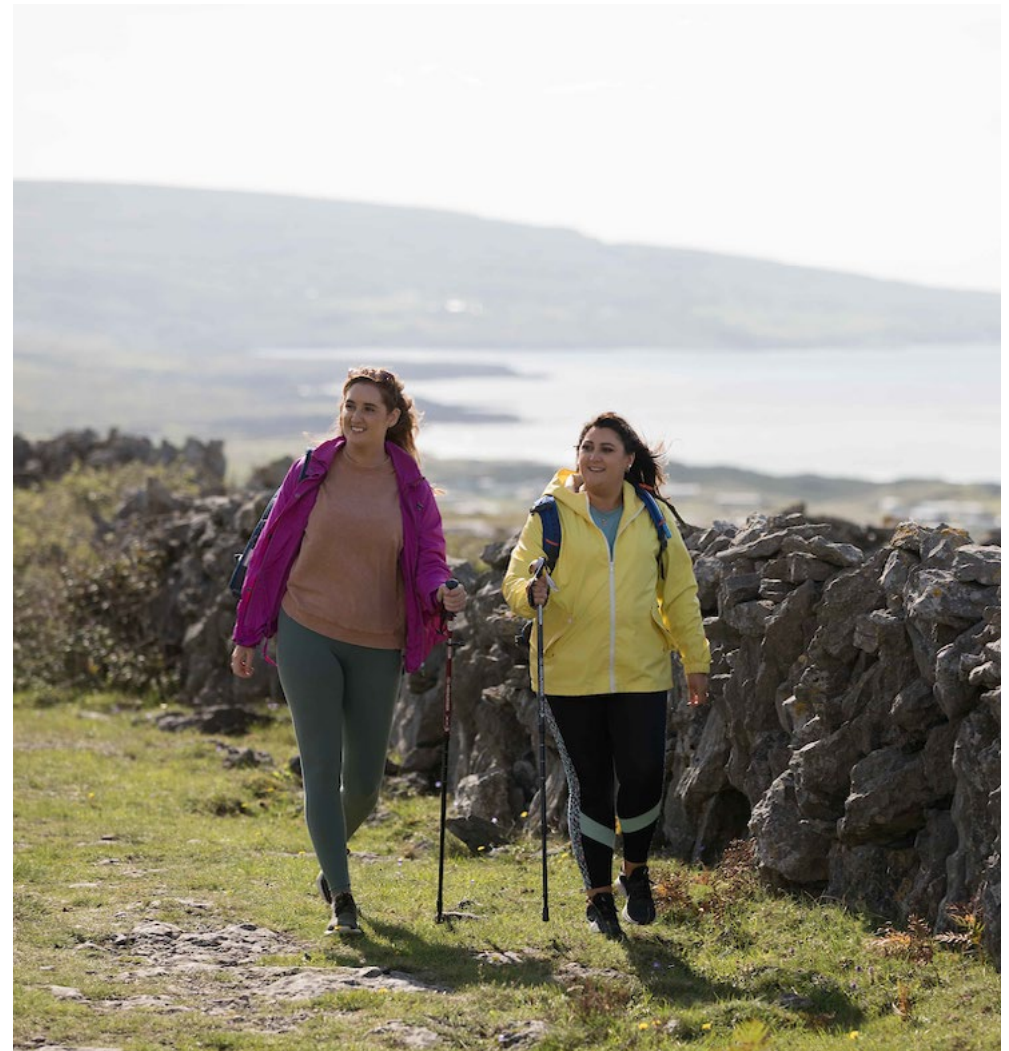
The audit of camping provision including popular wild camping locations highlights the popularity of coastal areas along the west and north Clare coasts with approximately 85% of pitches for tents, caravans and M&C in these areas. While visitor expenditure in the county has been estimated at €7.5million, it is evident that greatest expenditure occurs in the coastal areas.

Current Direct Expenditure	€ 7.5 million
Growing the Value per Visitor	€ 8.8 million
Growing Market Share & Value per Visitor	€ 13.2 million

The primary research findings highlighted that only 40% of M&C visitors currently stay in fee-charging overnight parking. This suggests that each year approximately 41,000 of the 68,000 vehicle nights in the destination do not pay for overnight parking. Similarly, 68% of visitors stated they do not spend on evening entertainment.

In order to maximise the economic opportunity within the M&C market a focus on increasing the value of each visitor will generate significant annual returns to the local economies. Increasing the proportion of M&C visitors that stay in fee-charging sites and increasing visitor engagement with the local evening time economy can realise a significant economic gain. As an indication of growing the value per visitor, increasing expenditure on overnight parking in registered sites and evening entertainment increases potential total annual expenditure by of current M&C visitors by €1.3 million to €8.8 million.

The provision of M&C facilities together with destination campaigns will enhance the reputation of the county for M&C visitors. The market share has been estimated on journey times of 2 hours to the county. Increasing the market reach with a travel time of three hours to Clare, combined with the value per visitor impacts identified above has been assessed and has established a potential growth of visitor expenditure from €7.5 million to €13.2 million per annum.



SECTION 6

REALISING THE OPPORTUNITY



6.1 M&C DESTINATION OPPORTUNITY FRAMEWORK

The independent assessment has identified four strategic opportunities for Clare to pursue. These are based on meeting immediate market needs, developing new facilities that will contribute to addressing existing visitor flow patterns and maximising the capital investment projects underway or in planning across the county. These are categorised under an opportunity framework for the destination aligned with the sector audit, emerging opportunities and contributing to the achievement of the objectives of the Clare County Tourism Strategy.

Functional Priority Locations - The development of new M&C facilities to address a key provision gap in a strategic tourism location and / or the delivery of a solution to address the challenges of congestion arising from unauthorised overnight parking.

High Potential Locations - The development of new M&C facilities to maximise strategic investment in major capital infrastructure projects and investment in new and existing visitor attractions that will influence future visitor orientation across the destination.

Opportunity Locations - The development of M&C facilities in locations with the capacity to attract visitors based on locations that can serve as access points to the wider destination, provide visitors with access to local hospitality or proximity to iconic Clare visitor attractions.

Regenerative Locations - The development of M&C facilities that will stimulate community tourism activity and contribute to the dispersion of visitors around the destination.



Functional Priority Locations

1. Ennis
2. Lahinch
3. Kilkee

High Potential Locations

4. West Clare Greenway Trailheads
5. Scariff - UL Greenway Trailheads
6. Kilaloe
7. Mountshannon
8. Miltown Malbay
9. Kilrush

Opportunity Locations

10. Kilbaha
11. Lisdoonvarna
12. Ballyvaughan
13. Corofin
14. Whitegate
15. Bunratty
16. Clarecastle

Regenerative Locations

17. Flagmount
18. Sixmilebridge
19. Carrigaholt
20. Quin
21. Feakle

6.2 FUNCTIONAL PRIORITY LOCATIONS

Functional Priority Locations- The development of new M&C facilities to address a key provision gap in a strategic tourism location and / or the delivery of a solution to address the challenges of congestion arising from unauthorised overnight parking.

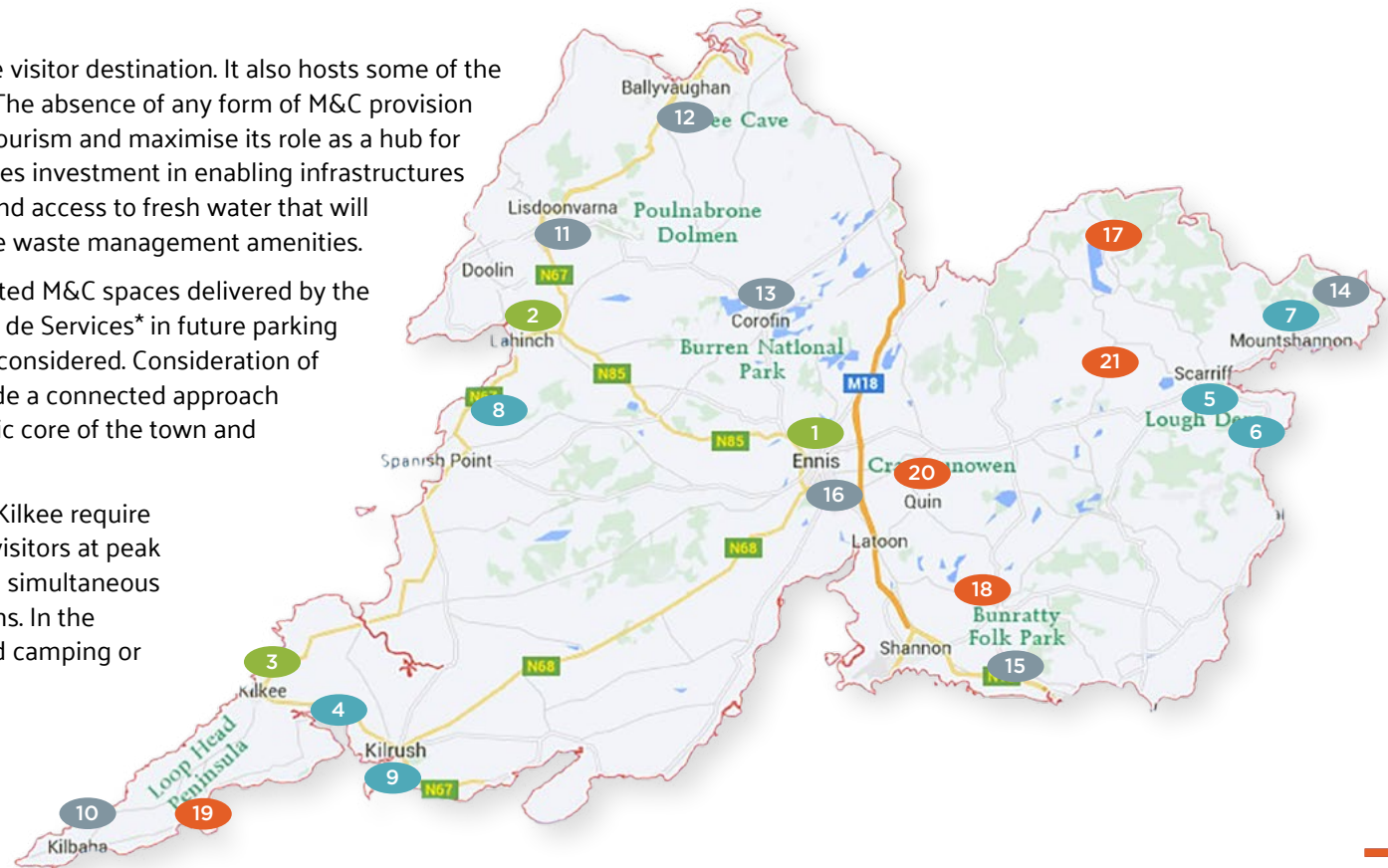
	Visitor Dispersal	Community & Economic Value	Season Extension	Linked to Strategic Investment	Destination Alignment Enabler (eg WAW, IHH)	Safe & Legal Stopover Options
FUNCTIONAL PRIORITY LOCATIONS						
1	Ennis	✓	✓		✓	✓
2	Lahinch		✓			✓
3	Kilkee		✓			✓

Ennis operates as a strategic gateway to the wider Clare visitor destination. It also hosts some of the largest cultural and sport tourism events in the county. The absence of any form of M&C provision is a limitation in the town's ability to grow the value of tourism and maximise its role as a hub for visitors to explore the wider county experience. It requires investment in enabling infrastructures such as service points providing waste water disposal and access to fresh water that will alleviate the requirements for temporary sites to include waste management amenities.

In the medium to longer term, the town requires dedicated M&C spaces delivered by the private or social enterprise sectors. The inclusion of Aire de Services* in future parking sites or mixed use commercial sites should be strongly considered. Consideration of sites aligned with the new Ennis Bus Scheme will provide a connected approach linking the overnight parking facilities with the economic core of the town and surrounding villages.

High season pressure in locations such as Lahinch and Kilkee require dedicated capacity to accommodate the influx of M&C visitors at peak periods. The enforcement of Parking Byelaws requires a simultaneous solution in providing dedicated overnight parking options. In the absence of new capacity being created, the issue of wild camping or unauthorised overnight parking will remain a challenge.

* An Aire de Service typically provides dedicated parking bays and access to waste water disposal and fresh water.



Based on the requirements to address key challenges or market gaps in the areas identified within the Functional Priority areas, the following represents areas for consideration in addressing some of the challenges.

Ennis

- Installation of a service point in the town to unlock the potential for peak season usage of parking/hard stand facilities in local community facilities e.g. schools, sports clubs or existing car parks.
- Consultation with accommodation providers in the Ennis area to identify any opportunities for the provision of overnight parking within the grounds of their business e.g. larger Hotel car parks, Public House car parks.
- Engage with local sports clubs in relation to providing for seasonal or event demands. The opportunity may exist with sports clubs to make toilets and shower facilities available to visitors, catering for a wider range of M&C vehicles.

Lahinch

- Installation of a service point in the town to unlock the potential for peak season usage of parking/hard stand facilities in local community facilities e.g. schools, sports clubs or existing car parks.
- Engage with existing private operators on potential opportunities for expansion of their business to include for M&C provision.
- Engage with private landowners in relation to identifying temporary potential sites for overnight parking to alleviate seasonal capacity demands.
- Engage with local sports clubs in relation to providing for seasonal or event demands. The opportunity may exist with sports clubs to make toilets and shower facilities

available to visitors, catering for a wider range of M&C vehicles.

- Assess the opportunity for repurposing cliff top car park to facilitate overnight M&C parking.
- Upon implementation of overnight parking provision, review and update bylaws as required to place limits on duration of stay and return periods in the town.

Kilkee

- Installation of a service point in the town to unlock the potential for peak season usage of parking/hard stand facilities in local community facilities e.g. schools, sports clubs or existing car parks.
- Engage with local sports clubs in relation to providing for seasonal or event demands. The opportunity may exist with sports clubs to make toilets and shower facilities available to visitors, catering for a wider range of M&C vehicles.
- Engage with private landowners in relation to identifying temporary potential sites for overnight parking to alleviate seasonal capacity demands.
- Engage with owners of lands zoned in the County Development Plan for potential development or expansion of camping and caravanning in the town. Locations include Site TOU1 zoned to accommodate the development of a camping and motorhome site in the area, and Opportunity site OP2 (Car Park to the Rear of Well Road) for the development of car, coach and motorhome /campervan facilities
- Upon implementation of overnight parking provision, review and update bylaws as required to place limits on duration of stay and return periods in the town and wider Loop Head peninsula.

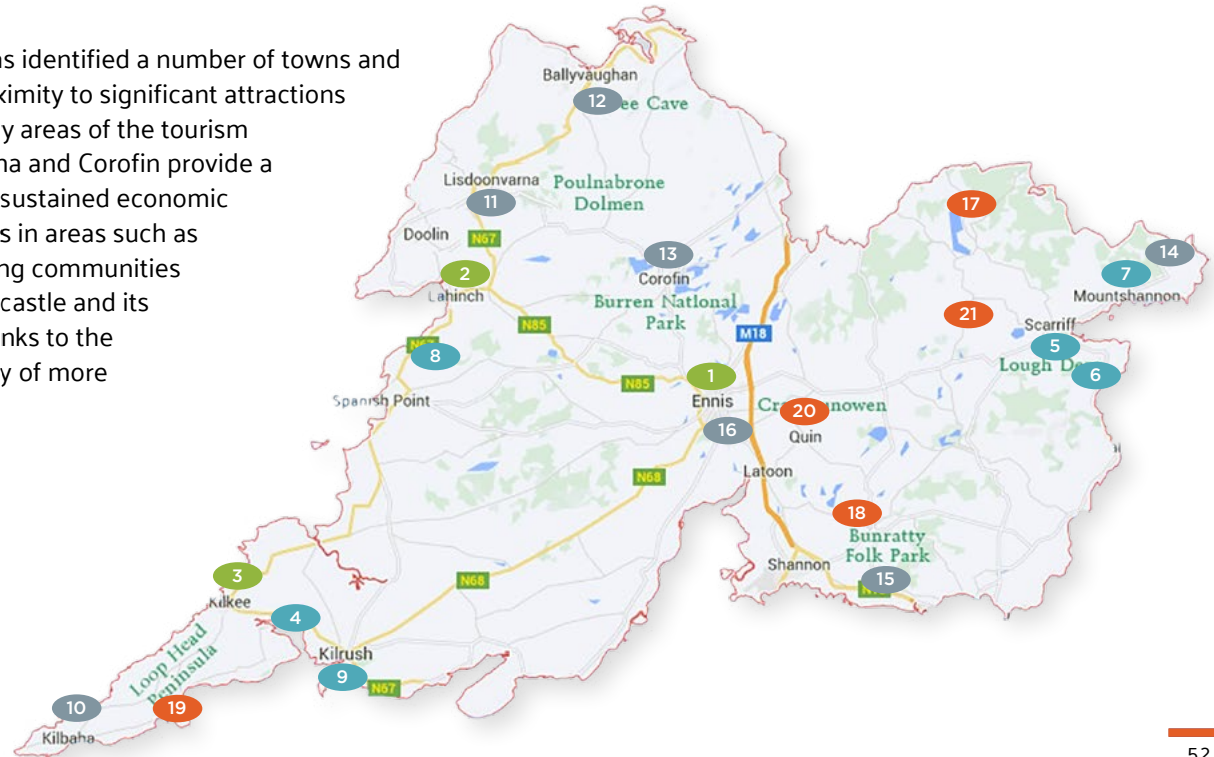


6.4 OPPORTUNITY LOCATIONS

The development of M&C facilities in locations with the capacity to attract visitors based on locations that can serve as access points to the wider destination, provide visitors with access to local hospitality or proximity to iconic Clare visitor attractions.

	Visitor Dispersal	Community & Economic Value	Season Extension	Linked to Strategic Investment	Destination Alignment Enabler (eg WAW, IHH)	Safe & Legal Stopover Options
OPPORTUNITY LOCATIONS						
10	Kilbaha	✓		✓		✓
11	Lisdoonvarna	✓	✓		✓	
12	Ballyvaughan		✓			
13	Corofin	✓	✓			
14	Whitegate	✓				✓
15	Bunratty		✓	✓		✓
16	Clarecastle		✓			✓

The audit analysis combined with the opportunity framework appraisal has identified a number of towns and villages as opportunity locations. These are locations that are in close proximity to significant attractions such as Loop Head Lighthouse and Bunratty Folk Park and also service key areas of the tourism destination including the Burren. The cluster of Ballyvaughan, Lisdoonvarna and Corofin provide a series of options/gateways into the Burren with the capacity to stimulate sustained economic value for the local communities. Potential community provision of facilities in areas such as Lisdoonvarna and Whitegate provides the opportunity to maximise existing communities or sports organisation resources in the localities. The accessibility of Clarecastle and its proximity to the Ennis urban centre via the river walk and new transport links to the town suggest an opportunity for social enterprise or private sector delivery of more permanent facilities.



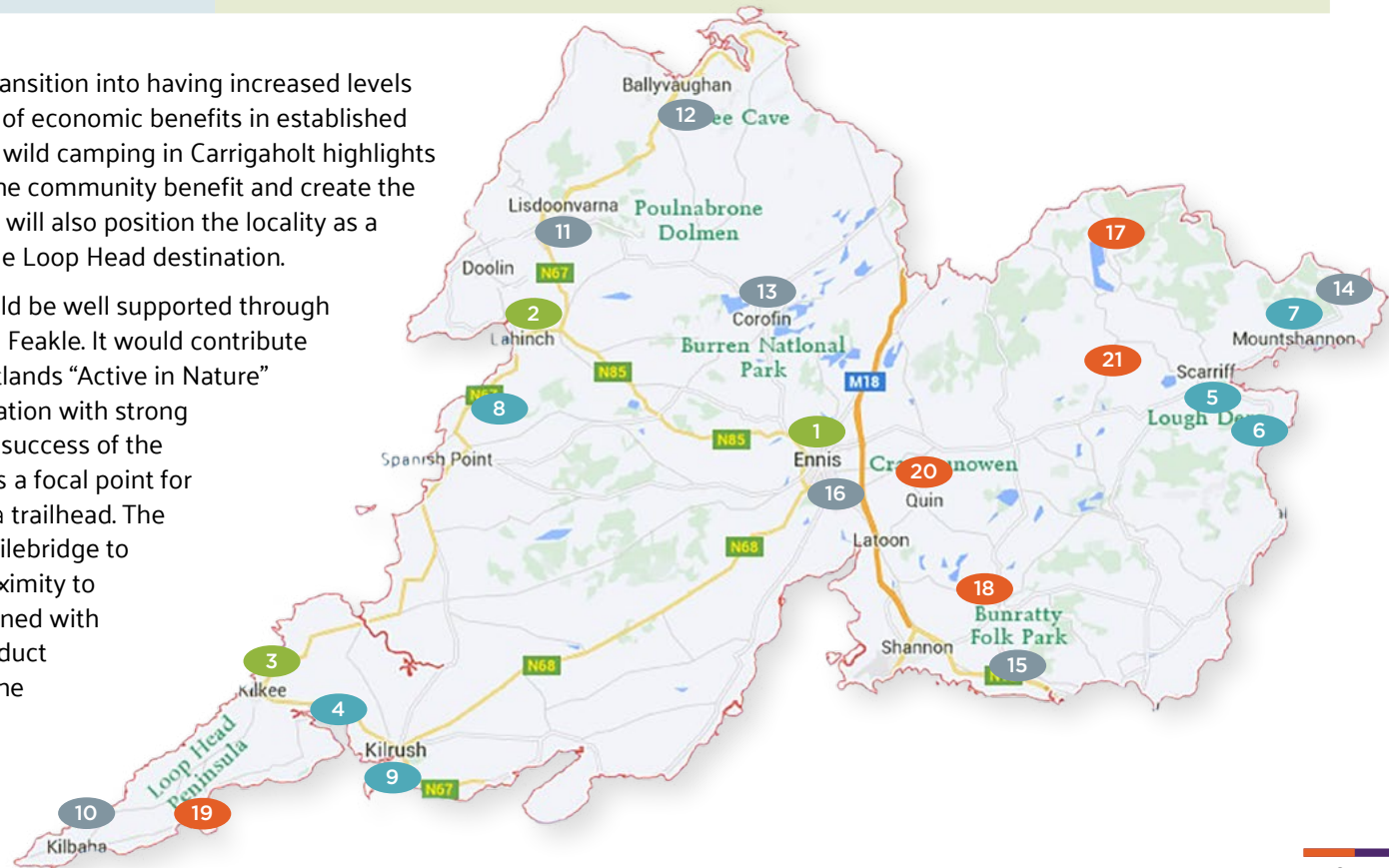
6.5 REGENERATIVE LOCATIONS

The development of M&C facilities that will stimulate community tourism activity and contribute to the dispersion of visitors around the destination.

	Visitor Dispersal	Community & Economic Value	Season Extension	Linked to Strategic Investment	Destination Alignment Enabler (eg WAW, IHH)	Safe & Legal Stopover Options
OPPORTUNITY LOCATIONS						
17	Flagmount Lough Graney	✓	✓		✓	
18	Sixmilebridge	✓	✓			✓
19	Carrigaholt	✓	✓		✓	
20	Quin	✓	✓			✓
21	Feakle	✓	✓			✓

The regenerative location focus is on communities that can transition into having increased levels of engagement with tourism and support a wider distribution of economic benefits in established destinations e.g. Loop Head and East Clare. The prevalence of wild camping in Carrigaholt highlights its location appeal. This needs to be harnessed to maximise the community benefit and create the infrastructure that will grow the value of visitors to the area. It will also position the locality as a M&C destination and contribute to visitor dispersion across the Loop Head destination.

The previously highlighted East Clare cluster opportunity would be well supported through the addition of M&C facilities in Flagmount Lough Graney and Feakle. It would contribute significantly to the development of the Ireland’s Hidden Heartlands “Active in Nature” brand positioning. Sixmilebridge represents an accessible location with strong connectivity through existing road and rail infrastructure. The success of the regenerative community project “12 o’clock Hills” is growing as a focal point for outdoor activity and the subsequent role of Sixmilebridge as a trailhead. The lack of accommodation in the area limits the capacity of Sixmilebridge to maximise the economic value of such a natural asset and proximity to locations such as Bunratty. Quin’s accessibility to Ennis combined with its status as a vibrant community hub with a rich heritage product base has the potential to leverage tourism to greater effect. The village offers access to a local night time economy that can address the largely transient tourism impact it currently experiences.



SECTION 7

CONCLUSIONS



CONCLUSIONS

- Clare continues to be a popular destination for motor home and camper van visits (M&C), attracting an estimated 78,000 visitors per annum generating 163,000 overnights for the county.
- The current M&C visitors to Clare contribute €7.5 million in direct expenditure to the local economy and an overall economic impact in excess of €10 million per annum.
- Currently 41,000 bed nights are outside of the formal parking structures in the county for M&C. The absence of appropriate facilities close to local communities/ local services is resulting in a loss of €1.3 million in potential spend per annum to local communities.
- Formal M&C locations are considerably outnumbered by the volume of wild camping stopovers used by the network of M&C visitors to Clare. This will continue to grow based on the influence of social media and M&C owner network.
- The current level of M&C visits who Wild Camp in the county is an estimated 60% of the overall total. i.e parking overnight at informal parking locations such as carparks and coastal viewpoint locations.
- M&C owner sentiment suggests a strong willingness to stay in formal facilities based on their priority requirements which include access to safe overnight parking locations and the ability to dispose of waste. The research into visitor needs reinforces the international research with the priority requirements being safe parking, grey and black waste disposal, access to fresh water and the ability to park overnight in close proximity to local hospitality and evening entertainment.
- The current availability of M&C facilities across the county is a direct market response to the demand for coastal locations. However, the absence of facilities in South and East Clare is limiting potential local tourism development opportunities and increased distribution of tourism economy benefits across the county.
- The potential domestic market reach of Clare as a M&C destination is considerable. There are currently 18,000 M&C registered owners in the Republic of Ireland. The market reach of Clare for weekend or longer stay breaks is 5,500 M&C owners within two hours of the county. This increases to a market potential of 15,000 M&C owners within a three hour journey to Clare.
- Clare is ranked 6th out of eight Wild Atlantic Way regional counties for registered M&C accommodation levels. It currently provides 829 bed spaces across 5 properties with a total of 218 pitches/units.. There is a considerable gap in provision in contrast to destinations such as Kerry, Cork, Mayo and Donegal. The communities within Clare associated with the Ireland's Hidden Heartlands features only one registered property offering 270 bed spaces.
- 83% of M&C visits to the county originate within the Republic of Ireland with Northern Ireland accounting for 13% of visits. International visitors represent 4% of visitors who stay at least one night in the county. Almost a quarter of M&C visitors to Clare return between 3 and 5 times a year, highlighting its appeal and accessibility. 28% of visitors will always stay in an official campsite while 68% will only sometimes stay in official campsites. 41% of visitors state that they tend to split their stay in Clare between official sites and wild camping.
- A number of key locations in the county are losing out on the economic opportunity presented by the M&C segment. Ennis, as host to multiple large events and gateway to the county, offers no facilities. Locations close to new and emerging visitor attractions provide limited or no options to increase dwell time in the local area e.g. Bunratty, Lisdoonvarna, Mountshannon and Kilrush.
- The economic profiling of M&C visitors highlights their spending power is directly linked to their capacity to overnight in locations where they can access local retail, hospitality and evening entertainment. In the absence of appropriate overnight parking facilities, a significant economic dividend will be lost. Increasing the value of each M&C visitor to the county over a focus on increasing visitor volume will generate sustained community impacts and ensure an increased dispersion of benefits across the county.
- An examination of best practice nationally and internationally highlights a range of supply side solutions for consideration. The opportunity to stimulate community tourism through social enterprise delivery of facilities has successfully transformed rural destinations across the country. Strategic partnerships and delivery of amenities linked to natural heritage locations e.g. Waterways Ireland in Portumna,

has the ability to provide quality M&C facilities in locations with significant appeal to the target audience.

- Private sector delivery of M&C spaces remains essential to the future delivery of an expanded range of options across the county. Public sector provision should only be considered where “market failure” has resulted in limited facilities in locations that are not currently offering suitable M&C overnight spaces.
- Wild camping will continue to be a challenge particularly in a number of coastal “hot spots” that are generating significant volumes of unauthorised overnight camping. This will remain an issue in the absence of appropriate provision of year round and peak period M&C facilities. The parking bye laws require enforcement and appropriate resourcing in order to address the scale of unauthorised M&C parking across the county.
- The beauty and uniqueness of the Clare landscape is a key demand driver for M&C visits. It also represents a significant barrier in the provision of facilities in a number of locations. Destination management and environmental management must prioritise the protection of the natural heritage of the county e.g. the Burren, Lough Derg. Future provision and planning for new or expanded facilities must be cognisant of the environmental and destination management challenges that are essential to preserving the uniqueness of the county as a place live and visit.
- International destinations have addressed the challenges of M&C facility provision through investment in centralised service points as key enablers to open up access to a network of locations where onsite waste disposal is not achievable. In areas that are more environmentally sensitive or urban locations with no M&C facilities such service points have become the catalysts for the development of appropriate facilities.



SECTION 8

RECOMMENDATIONS



RECOMMENDATIONS

RECOMMENDATION 1: PROVISION OF FACILITIES AT ENNIS

In the absence of a private sector development in Ennis, a blend of the recommendations contained within this assessment will be necessary. The provision of an Aire de Service should represent an overnight parking solution supported by the implementation of the appropriate Byelaws that prevent extended stays. The pressure on land in Ennis will necessitate a blended model to deliver a more permanent location for M&C parking in the town. This will require the inclusion of dedicated M&C spaces as part of future commercial/development sites close to the town. Working with local groups or local clubs can unlock a number of parking areas. However, in the absence of the appropriate centralised service point facilities, this will have limited appeal beyond temporary event facilities provision. The accessibility of Clarecastle and its proximity to the Ennis urban centre via the river walk and new transport links to the town suggest an opportunity for social enterprise or private sector delivery of more permanent facilities. The village also offers the variety of amenities that visitors have indicated they require in terms of access to retail and local hospitality.

RECOMMENDATION 2: STRATEGIC PARTNER DELIVERY

The success of the Waterways Ireland investment in M&C facilities at Portumna Harbour continues to represent an example of best practice nationally. The operational base of agencies such as Waterways Ireland and Coillte in East Clare provides immediate opportunities to consider. Coillte has identified a number of potential sites in the county with the potential for M&C overnight parking. This opportunity could be realised through a partnership approach i.e. engaging with the private sector to deliver woodland M&C facilities subject to appropriate environmental (see Appendix 2). Initial scoping of sites under the stewardship of relevant agencies is recommended in addition to an examination of future use possibilities.

RECOMMENDATION 3: PARKING BYELAWS IMPLEMENTATION

Creating peak season capacity will be a priority to support the implementation of Parking Byelaws. Key enabling infrastructure such as the installation of service points to activate the use of alternative parking spaces must be considered to deliver an integrated approach.

RECOMMENDATION 4: ADDRESSING THE SUPPLY SIDE CHALLENGE

In contrast to comparable destinations along the Wild Atlantic Way, Clare is behind in the provision of M&C facilities for visitors. There is also an imbalance the distribution of facilities across the county that can stimulate a wider dispersion of visitors throughout the destination. The audit of existing formal provision combined with “wild” or unauthorised camping illustrates the demand for coastal locations. The current absence of facilities in the South and East Clare is a limiter to tourism development for that part of the county.

The key supply side recommendation arising from this assessment is the stimulation of interest within the private and social enterprise sectors to deliver short to long term solutions.

The analysis has identified four categories of opportunity that includes addressing the existing pressure points such as Lahinch or gaps such as a lack of facilities in Ennis. Future consideration should be given to emerging opportunities that will arise from capital investment to road infrastructure (Killaloe), visitor attractions development (Holy Island) and activities development (greenways investment). The following represent a number of supply side options for consideration aligned with the towns and villages identified within the opportunity framework.

4.1 Social Enterprise Project Pilot

To address the current facility supply levels, a priority focus is recommended to generate interest in developing facilities within the social enterprise and community sector. The evidence nationally suggests new opportunities exist for social enterprises to link community facilities with the provision of new M&C amenities. The example of Graiguenamanagh's River Barrow Activity Hub is an exemplar in how social enterprise can be developed around the M&C opportunity. It will require the alignment of existing funding streams such as Leader grant support. A pilot programme to support two social enterprises/community initiatives in East and West Clare should be prioritised in locations where there is an absence of or limited M&C facilities.

4.2 Expansion of existing private sector operator facilities

A number of existing operators are planning an expansion of the number of spaces dedicated to M&C. Official registered sites and sites operating to the welcome standard represent an immediate platform for the expansion of M&C spaces for overnight and short term stays. Sites that are currently operating on a seasonal basis have the potential to extend their season without significant overheads. The extension of the use of such sites and converting them into Winter Aires with a maximum 48 hours stay should be considered and piloted in a number of key locations. Engagement with registered operators should be undertaken to determine the non-financial / advisory supports that should be available. Such supports may include planning advice on elements including requirements for wastewater treatment.

4.3 Private sector – non campsite space provision incentive programme

There are many successful examples nationally and internationally of M&C spaces delivered outside of traditional camping sites. More recently, the incentive programme operated by Donegal County Council to generate interest in M&C space provision resulted in a number of new overnight M&C facilities created in the county e.g. public house car parks, community facilities.

A comparable seed funding programme should be reviewed in Clare through relevant funding / rural development agencies. The allocation of such grant support should be aligned to investment in areas of strategic importance for tourism in the county, addressing existing pressure points and motivating visitors to explore lesser trafficked areas within the destination.

Further funding opportunities for the development of M&C provision by community groups and the private sector should be considered through local development funding streams (e.g. LEADER) supporting new business start-ups and expansion of existing operations.

It is recommended that Clare County Council should consider a process to invite Expressions of Interest from organisations, groups and the private sector who may consider pursuing opportunities for M&C provision.

4.4 Aires de Service – East/South Clare

The key supply side recommendation arising from this assessment is the stimulation of interest within the private and social enterprise sectors to deliver short to long term solutions. This is particularly the case in West and North Clare. Public sector intervention may however be required where there is currently low or no levels of provision. The provision of Aire de Services in a number of strategic locations in East Clare, South Clare and Ennis should be considered on the proviso that such amenities do not compete with the private sector. Temporary “Aires” or allocating dedicated spaces in new car parks are among the initiatives that should be considered. An associated site management programme and resourcing of personnel will also be required for such Aires to ensure sustained management of such facilities.

4.5 Installation of Service Points

The installation of a number of service points across the county has the capacity to open up a number of local facilities to provide overnight M&C parking. It would provide a centralised access point for waste disposal and access to fresh water. The installation of a service point would remove the need for potential new overnight parking sites to provide such waste management facilities. The installation of service points and facilities in locations such as Active Ennis Leisure Centre or comparable locations such as Kilkee would unlock the potential for peak season usage of parking/ hard stand facilities in local community facilities e.g. schools, sports clubs or existing car parks. Areas identified as having “functional priority” requirements including Ennis, Lahinch and Kilkee should be prioritised for immediate consideration. The identification of an appropriate site for service points installations have the ability to service temporary parking facilities within a 10 to 20 kilometre radius.

RECOMMENDATION 5: WELCOME STANDARD – QUALITY STANDARDS

Currently the county offers five Fáilte Ireland registered caravan and camping sites and one Fáilte Ireland Welcome Standard site. Future sites should be encouraged to deliver facilities to a minimum of the Welcome Standard. The continued national and international positioning of Clare as a quality tourism destination will be well served by increasing the number of Welcome Standard sites operational in the county. Promoting future site development and encouraging existing sites to achieve these minimum quality standards should be a key priority.

RECOMMENDATION 6: MOTOR HOME AND CAMPER VAN DESTINATION WELCOME – CODE OF PRACTICE

In addition to addressing the existing supply side deficits, a broader destination campaign is required to position Clare as a M&C friendly destination. The M&C destination ‘welcome’ initiative should be developed to include sustained messaging of how the county welcomes overnight stays but also highlights how visitors must use and respect facilities provided within a sustainable tourism destination. The development of a code of practice for M&C visitors to Clare is recommended. This will further highlight the need to adhere to Parking Byelaws and the promotion of responsible engagement with local communities and use of designated parking facilities.

RECOMMENDATION 7: CLARE WELCOME HOSTS SITES

The creation of a county wide initiative “Clare Welcome Host Sites” will result in a network of artisan food and drink producers and attractions providing access to a number of overnight parking spots on a 24 hour maximum stay basis. The recommendation is based on similar international programmes where local producers provide an overnight space in return for an expectancy that visitors will purchase some local produce. International examples include French Passion that has successfully built up a national network of food producers offering a maximum of a one night stay on-site in predominantly rural locations. As a pilot initiative, two sites



should be proposed from existing tourism networks in the county such as the Burren Eco Tourism Network, Loop Head Tourism and East Clare Tourism, on a trial basis. The pilot model will ensure county wide representation and provide 24 hour stays across a variety of rural locations ensuring lesser trafficked areas are included in the promotion of the initiative.

RECOMMENDATION 8: FUNDING ALIGNMENT

The M&C opportunity for rural economies is considerable based on the expenditure patterns identified within the primary research. A coherent development approach is required to stimulate interest within the private and social enterprise sectors to realise the opportunity. Support for a number of initiatives identified in this assessment will require a co-ordinated funding approach. Grant programmes available through Leader may provide social enterprise groups with access to funding opportunities to support recommended initial pilot projects in East and West Clare.

RECOMMENDATION 9: PLANNING

The assessment has highlighted the future provision of M&C facilities around

the county will be best delivered through the private sector and social enterprise. Planning applications for M&C provision will be assessed on their specific individual merits and in accordance with planning requirements.

However, consideration should be given to facilitating pre-planning meetings and annual planning workshops to support potential developers in identifying potential constraints and associated potential cost implications at an early stage. Attendance by potential funding and grant administrators should be considered to add value to the workshops. A tie in with the expressions of interest process would represent an integrated approach providing immediate guidance for interested parties.

Specific areas for guidance should include options for treatment of M&C wastewater. Secondary research has also highlighted a number of dedicated M&C facilities in Ireland and the UK where the spacing provided between vehicles is

less than the spacing provided between pitches on a camping, caravan and mobile home sites. Consideration should be given to undertaking an internal review of legislation in conjunction with the Fire Service, to determine the optimum, safe minimum spacing for vehicles.



APPENDICES



Appendix 1

Registered Camping and Caravanning Accommodation



WILD ATLANTIC WAY REGISTERED CAMPING & CARAVAN ACCOMMODATION

County	Accommodation Type	Properties	Units/Pitches	Bed-spaces
Clare	Camping & Caravanning	4	210	794
	Camping (Welcome Standard)	1	8	35
	Total	5	218	829
Donegal	Camping & Caravanning	6	606	2,472
	Camping (Welcome Standard)	3	101	284
	Total	9	707	2,756
Sligo	Camping & Caravanning	3	380	1,051
	Camping (Welcome Standard)	1	26	104
	Total	4	406	1,155
Mayo	Camping & Caravanning	7	459	2,052
	Camping (Welcome Standard)	1	66	296
	Total	8	525	2,348
Galway	Camping & Caravanning	4	189	682
	Camping (Welcome Standard)	1	48	96
	Total	5	237	778
Limerick	Camping & Caravanning	1	28	112
	Camping (Welcome Standard)	1	40	200
	Total	2	68	312
Kerry	Camping & Caravanning	13	932	4,571
	Camping (Welcome Standard)	2	79	266
	Total	15	1,011	4,837
Cork	Camping & Caravanning	8	592	2,870
	Camping (Welcome Standard)	4	46	187
	Total	12	638	3,057
Wild Atlantic Way	Camping & Caravanning	46	3,396	14,604
	Camping (Welcome Standard)	14	414	1,468
	Overall Total	60	3,810	16,072
Ireland	Camping & Caravanning	81	6,511	30,439
	Camping (Welcome Standard)	23	661	2,609
	Overall Total	104	7,172	33,048

The Wild Atlantic Way region accounts for approximately 55% of camping and caravan pitches in Ireland.

County Clare is placed 6th of 8 counties in terms of number of camping and caravanning pitches available, representing a 6.5% share. Kerry has the highest number of pitches while the neighbouring counties of Limerick and Galway below Clare.

IRELAND'S HIDDEN HEARTLANDS REGISTERED CAMPING & CARAVAN ACCOMMODATION

County	Accommodation Type	Properties	Units/Pitches	Bed-spaces
Clare	Camping & Caravanning	1	45	270
	Camping (Welcome Standard)	0	0	0
	Total	1	45	270
Cork	Camping & Caravanning	0	0	0
	Camping (Welcome Standard)	0	0	0
	Total	0	0	0
Tipperary	Camping & Caravanning	1	30	90
	Camping (Welcome Standard)	1	1	4
	Total	2	31	94
Leitrim	Camping & Caravanning	2	65	260
	Camping (Welcome Standard)	0	0	0
	Total	2	65	260
Roscommon	Camping & Caravanning	2	103	466
	Camping (Welcome Standard)	1	5	23
	Total	3	108	489
Longford	Camping & Caravanning	0	0	0
	Camping (Welcome Standard)	0	0	0
	Total	0	0	0
Westmeath	Camping & Caravanning	0	0	0
	Camping (Welcome Standard)	1	40	200
	Total	1	40	200
Cavan	Camping & Caravanning	1	42	133
	Camping (Welcome Standard)	0	0	0
	Total	1	42	133
Galway	Camping & Caravanning	0	0	0
	Camping (Welcome Standard)	0	0	0
	Total	0	0	0
Offaly	Camping & Caravanning	0	0	0
	Camping (Welcome Standard)	0	0	0
	Total	0	0	0
Ireland's Hidden Heartlands	Camping & Caravanning	7	285	1,219
	Camping (Welcome Standard)	3	46	227
	Overall Total	10	331	1,446

Ireland's Hidden Heartlands region accounts for approximately 5% of camping and caravan pitches in Ireland.

One property in Clare is located within the IHH boundaries. This site represents 14% of all camping and caravanning pitches available in the Ireland's Hidden Heartlands.

Appendix 2

Potential Coillte Sites



DISCLAIMER

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Repucon Consulting reserves the right to make adjustments to the estimate of the values reported herein, if additional or more reliable information becomes available after the report date.

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