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Marine Ecotourism

A Marketing Initiative in West Clare

October 2001

Prepared for

The Marine Institute

by

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Atlantic Area INTERREG-IIC Programme

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SECTION ONE
INTRODUCTION

1.1. Background to Marine Ecotourism

Many definitions of ecotourism exist, but there is an emerging consensus that it is a subset of nature-based tourism and of sustainable tourism. Ecotourism is reputed to be the fastest-growing sector of the world tourism industry, with estimates of its rate of growth ranging anywhere between 10% and 30% per annum. It is reputed to attract high spending tourists, and estimates suggest it to be 'worth' between $10 and $17.5 billion worldwide (Fennell,1999). Recognising its global importance, the United Nations General Assembly has declared the year 2002 as the International Year of Ecotourism and Responsible Tourism. The focus of this document is on a particular form of ecotourism known as marine ecotourism, i.e. ecotourism activities that take place in the coastal zone, in the marine environment, or in both.

While ecotourism is based on enabling people to experience the natural environment in a manner that is consistent with the principles of sustainable development, marine ecotourism is about attempting to establish and maintain a symbiotic relationship between tourism and the natural marine environment. Marine ecotourism activities may be water-based, land-based, or both. They may be formally organised or undertaken independently. They may form the basis of a specialist holiday or simply be an element of a conventional holiday. Examples of activities that could be marine ecotourism include: watching whales, dolphins, sharks, seals and other marine animals, seabird ornithology, diving and snorkelling, nature-based sightseeing trips by surface boat or submarine, rock-pooling, coastal footpath and beach walking and visiting seashore and sea life centres.

Marine ecotourism can generate positive outcomes for the natural environment, for example:

- by more widely propagating eco-awareness and the principles of sustainable development
- by providing economic alternatives to activities that degrade or deplete the natural environment
- by raising funds that can be used for environmental protection.

However, if marine ecotourism is to play this role effectively, it must be developed and marketed within a planning framework that ensures that the practice of ecotourism is compatible with sustainability considerations. Marketing an area for marine ecotourism encourages the tourists to come close to nature. Such exposure carries with it the risk of causing damage to the very things that ecotourism providers are helping tourists to experience. Marine ecotourism that is managed badly, or excessively, may do more harm than it does good. Any development and marketing plan for marine ecotourism therefore needs to be based on awareness of these risks. Good ecotourism marketing dictates that the tourism 'offer' be designed in such a way that tourists receive a satisfying experience - one that they will pay for - while respecting the natural environment in which such activities take place and on which such activities depend. Ecolabels and codes of conduct are used to provide assurance, through independent monitoring, that the quality of the products being sold live up to their actual or implied promises. In the case of a marine ecotourism product this is the promise to enhance and protect the marine environment while providing

a quality interpretative experience to the customers, the benefits of which accrue to the local society and economy (META- 2001).

1.2. The European META- Project

The *Marine Ecotourism for the Atlantic Area* (META-) project was co-financed by the European Regional Development Fund (ERDF) via the EU Interreg IIc (Atlantic Area) Programme and the UK Department of Transport, Local Government and Regions. There were four European partners involved in the project – University of the West of England Bristol (UK), Marine Institute, Dublin (IR), Torbay Council (UK) and Escuela de Negocios MBA, Gran Canaria (ES).

The aim of the overall META-project was to promote genuinely sustainable marine ecotourism as a tool of regeneration of peripheral coastal communities.

The META- objectives were

(1) to generate appropriate local, regional, national and transnational guidance on the spatial planning structures, policies and frameworks that will be needed to develop the potential of marine ecotourism
(2) to identify and evaluate opportunities for diversification into marine ecotourism, thereby developing products that not only enhance the quality of tourism provision but also help to reinforce the economic and social cohesion of coastal communities in the Atlantic Area.

These aims and objectives were met through a three-phase process.

Phase 1: Baseline Project comprised the application of a common baseline auditing and mapping process, in order to develop a common assessment framework which put each of the case study areas into its environmental, economic, social, institution and policy context. This included a scientific baseline audit of the Atlantic's capacity to generate ecotourism activity and an assessment of the motivational basis of marine ecotourism.

Phase 2: Parallel Projects:

Each of the partners carried out a case study in their own selected region.

(A) Transport Patterns Impact study for META- (University of the West of England).
(B) Developing the market for META- and clustered tourism products in West Clare (Marine Institute, Ireland)
(C) Economic and social impacts of META- on coastal communities in Gran Canaria (Escuela de Negocias MBA Gran Canaria, Spain)
(D) Codes of conduct and operational guidelines for META- (Torbay Council, UK).

Phase 3: The Integrative Project used a common assessment framework to appraise the results from the parallel projects in their spatial and socio-economic contexts. The principal outcomes are documentation on spatial planning and transport policy guidance and a blueprint for producing marketing strategies for marine ecotourism*.

*(Documentation available on http://www.tourism-research.org)

The META- project used the following working definition for genuinely sustainable marine ecotourism:

> Genuinely sustainable Marine Ecotourism is that kind of nature-based tourism which:
> 1. Interprets marine wildlife and its environment to provide a better quality experience for tourists
> 2. Increases appreciation of the marine environment and raises the overall conservation ethic, thereby making a fuller contribution to environmental conservation
> 3. Decreases and/or minimises the negative impact of tourism on the marine environment
> 4. Interprets the local marine/coastal culture and heritage
> 5. Genuinely involves the local community in decision making
> 6. Is managed according to the principles of sustainable development.

1.3. The Irish (West Clare) META- Project

1.3.1. Profile of West Clare

Situated on the mid-west coast of Ireland at the most western extremity of County Clare, the study area is a peninsula stretching out to the sea at Loop Head (Map 3.1 p.29). Bounded on one side by the Shannon Estuary and on the other by the Atlantic Ocean, the area has a long tradition of fishing as a primary source of income. In recent years due to progressive reductions in fishing opportunities under the EU's Common Fisheries Policy this source of income has deteriorated. An historically heavy dependence on the domestic tourism market, with a tradition for long stay family holidays, has also put pressure on the tourism sector of the local economy. Unemployment rates in the region are above the national average (17.3% in 1996 as opposed to 14.8% at national level) and the demographic structure reflects an ageing population, which is not being replaced. Rural depopulation is evident especially in the more remote and westerly parts of the region.

In terms of access, West Clare is remote from major centres of population and major roadways. There are no national primary roads in the area or rail networks. Bordered by a number of established tourism destinations, such as Ennis, the Cliffs of Moher and the Burren, it lies to the west of the major touring route from Kerry through Clare to Galway. The Killimer-Tarbert car ferry carries an estimated 600,000 people across the Shannon Estuary every year en-route to and from North Kerry and Clare. Therefore, although well positioned in terms of tourism, this sector remains relatively underdeveloped in the area due to remoteness and peripherality and to strong competition from tourism destinations such as Kerry and North Clare, (Marine Institute et al., 1999).

The area is rich in nature-based resources. The Shannon Estuary is home to the only known resident school of bottlenose dolphins in Irish Waters. It was declared a Candidate Special Area of Conservation (SAC) under the EU Habitats Directive in April 2000 for the protection of the dolphins. There is a growing dolphin watching industry and boats operate out of Kilrush and Carrigaholt between April and October. Internationally important wetland sites for waders and wintering wildfowl, nationally important colonies of breeding seabirds, one of Ireland's premier locations for seabird watching and a diversity of habitats make West Clare a birdwatcher's paradise. Expert led birdwatching trips, nature photography workshops and ecology activities are on offer from the NatureQuest Centre at Poulnasherry Bay. Rocky shorelines on the Atlantic seaboard and estuarine mudflats on

the Shannon estuary provide a range of habitats that support a diversity of marine life. The area around Kilkee is probably the most popular diving site in Ireland (Irish Underwater Council, 1994). A purpose built diving and watersports centre on the harbour at Kilkee services the area. An aquarium is located at Lahinch Seaworld. Kilrush Marina provides 120 pontoon berths at all stages of the tide and a watersports activity centre also in Kilrush, provides sail training and canoeing activities. Maritime cultural sites dotted around the coastline include lighthouses, medieval castles, shipwreck sites, martello towers, the West Clare railway, fishing piers and harbours.

1.3.2. Background to the West Clare META- Project

In 1998 the Marine Institute was approached by Shannon Development Ltd., the Regional Development Authority for the Shannon Region, to examine West Clare as a potential region for marine tourism development. The Marine Institute, through its consultations around the Irish seaboard, had identified the issues of integration and co-ordination as central in the development of Ireland's marine tourism resource. In response, the Marine Institute proposed a pilot project to identify measures to create a unified focus on marine tourism in the West Clare Peninsula.

The resulting study report titled*, Special Interest Marine Tourism in the West Clare Peninsula*, compiled in conjunction with local community interests and published by the Marine Institute, Shannon Development and Clare County Council in December 1999, highlights the distinct marine tourism products which are of national and international significance in the West Clare region. It includes activities such as SCUBA diving, sailing, wind surfing, bird watching, whale and dolphin watching.

The study included the following recommendations:

- Greater co-ordination and cohesion of activity including marketing
- Establishment of a marketing brand and logo for West Clare
- Promote West Clare as an 'activity zone' at county, regional and national levels
- Market research to identify and profile existing and potential tourist groups
- Development of holiday packages
- Development of the holiday accommodation base
- Joint marketing initiatives
- Training in business and management, safety and marine procedures, welcoming hospitality and customer care and quality
- Provision of good transport access
- Development of a West Clare website
- Establish a co-operative Tourism Implementation group.

In late 1999 the Marine Institute became partners with the University of the West of England, Bristol in the META-project. Inclusion under META- presented the Marine Institute with the opportunity to develop a framework for marketing marine ecotourism in a pilot area.

The Marine Institute selected West Clare as the case study area for the Irish META-project and the objectives of the project were based on the recommendations of the *Special Interest Marine Tourism in the West Clare Peninsula,* report (Marine Institute et al., 1999) as outlined above.

1.3.3. Aims and Objectives of the West Clare META- Project

The main aim of the West Clare META- project was to seek to establish a framework for the development and marketing of a range of integrated marine ecotourism products aimed at attracting a greater level of participation in a number of marine ecotourism activities which currently exist in the study area.

The objectives of the study were to assess the:

- tourist motivation for ecotourism
- feasibility of marketing a 'package' of ecotourism activities
- implications of a 'branded ecotourism area' for the sustainable development of marine ecotourism
- feasibility of promoting packaged ecotourism products using innovative marketing tools, including the internet.

1.3.4. Scope of the West Clare META- Project

The West Clare META-project was carried out as a parallel project within the overall European META- project (January 2000-September 2001). As such, the West Clare parallel project had a designated timescale of twelve months to achieve its stated objectives. Resources were allocated for the employment of a full-time project manager for a one-year contract (August 2000-2001). The responsibilities of the project manager included the day-to-day planning, management and implementation of the West Clare parallel project and involvement at all levels of the European project (baseline and integrative phases). The timescale and objectives of the META- European study determined the scope of the West Clare project.

1.3.5. Methodology of the West Clare META- Project

The aim and objectives of the West Clare META- project were achieved primarily through community consultation and participation. In the early stages of the project consultative meetings were held with local statutory agencies and community organisations involved in existing marine tourism activities in West Clare. The purpose of these consultations was to raise awareness of the META- project objectives, to achieve consensus at a local level on the most efficient processes to be employed and to ensure integration of the META-project with existing tourism developments while avoiding duplication of work planned or already completed.

The main objectives of the project were subsequently implemented by the project manager in conjunction with a selected group of marine tourism operators and accommodation providers from the West Clare area. The META- project manager undertook the role of facilitator between local community level and central agency level, allowing the bottom-up process to meet the top-down. Awareness and capacity building seminars were organised

to empower the local tourism operators to participate in the process and to provide skills to enable them to play an active part in the implementation of the ecotourism marketing strategy. This process eventually led to the project being wholly owned and controlled at local level, with the establishment of the independent marketing group operating under a new brand image.

SECTION TWO
The Implementation of the West Clare META- Project

2.1. Introduction

The aim of the West Clare META- project was to seek to establish a framework for the development and marketing of a range of integrated marine ecotourism products aimed at attracting a greater level of participation in a number of marine ecotourism activities which currently exist in the study area. To ensure sustainability, the Marine Institute planned from the outset that management of the project would be locally based and involve a high level of community participation. While planning and management would be bottom-up in nature it was also imperative that the local stakeholders could link into the wider regional, national and international planning structures (the top-down planning structures) and the META- project would act as a facilitator in this process. Local ownership of the project would allow control to develop where impacts occur. This sense of ownership and control engenders a long-term commitment to development and enhances its sustainability.

Through the West Clare META- project, local stakeholders were encouraged to network together to develop a brand image and promotional materials through which they can now market their cluster of activities. To enable participation by the local stakeholders, the project provided a series of capacity and awareness building exercises in the form of marketing and business skills workshops. Linkages were forged with the Regional Development Authority and the County Council to enable promotion on a national and international level and to examine planning structures for ecotourism development in the region.

2.2. Community Consultation and Participation

To achieve successful implementation of a sustainable ecotourism product in West Clare, the West Clare META- project worked closely with statutory bodies involved in management and planning, local tourism operators and accommodation providers and interested members of the local community.

2.2.1. Community Consultation

In the early stages of the project consultative meetings were held with local statutory agencies and community organisations involved in existing marine tourism activities in West Clare. The purpose of these consultations was to raise awareness of the META- project objectives and to achieve consensus on the most efficient processes to be employed in ensuring that the objectives of the project were met.

- Consultations were held with the Shannon Dolphin and Wildlife Foundation (Fig. 2.1) to discuss the aims and objectives of the Foundation work to date, and the parallels between this project and the META- project.

- Consultations were held with Shannon Development Ltd. and Kilrush Urban District Council to discuss past and present tourism projects in West Clare, existing marketing plans for the area, the planning of a future marketing strategy and possible interlinks between the META- project and existing marketing groups in the Shannon region. The feasibility of Shannon Development undertaking a role in training and consultancy in the marketing section of the META- project was also discussed.

- Discussions were held with Shannon Development Ltd. on the role of the Marine Study Implementation Group (a local public, private and voluntary partnership set up to implement the recommendations of the *Special Interest Marine Tourism in West Clare* report), the role of the Shannon Dolphin and Wildlife Foundation, the future role of the META- cluster group (Section 2.2.2) and the future interaction between all of these groups. It was agreed that the Marine Study Implementation Group would act as an umbrella group to oversee the implementation of the total recommendations of the *'Special Interest Marine Tourism in the West Clare Peninsula'* report. The West Clare META- project would be instrumental in implementing some of the marketing recommendations of that report, while the Shannon Dolphin & Wildlife Foundation would be concerned with the implementation of the recommendations related to the dolphin-watching industry. Both the West Clare META- project and the Shannon Dolphin and Wildlife Foundation would be represented on the Marine Study Implementation Group through their project managers. The West Clare META- cluster group would be a separate entity representing the community. Their objective would be to develop a marketing strategy for marine ecotourism in West Clare facilitated by the META- project manager.

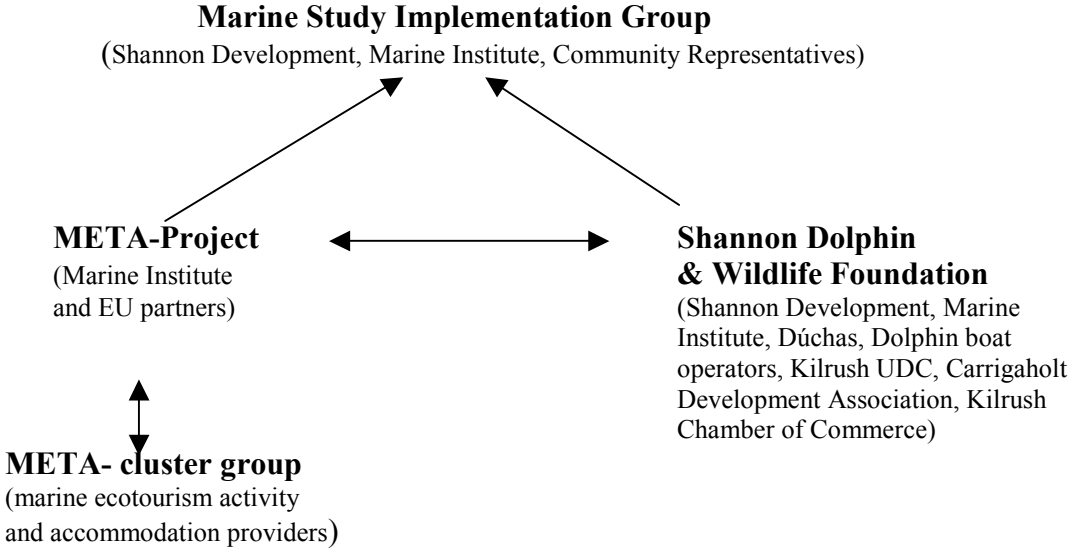


Fig. 2.1: Community Consultation Structure.

Participation by the West Clare META- project manager at the 'Marine Study Implementation Group' meetings and 'Shannon Dolphin & Wildlife Foundation' meetings helped to further the consultative process throughout the West Clare META-project, as continuous updates on the project progress were delivered and discussed. Both of these groups contain representatives of wider community groups who in turn reported progress back to their own groups.

- As part of the process of feeding into the overall META- integrative project, the West Clare META- project manager conducted interviews with planning authorities within the region to help identify case studies for the '*Planning for Marine Ecotourism in the EU Atlantic Area – Good Practice Guidance'* (META-2001) which was a final deliverable of the overall META- project. These interviews also served to highlight the aims, objectives and progress of the West Clare project. This consultative process enhanced the integration of the META-project into existing local planning structures and created working cross linkages with relevant local authorities.

2.2.2. Community Participation – Formation of the META-cluster group

An information session on the META- project with the objective of forming a marketing cluster group was organised by the META- project manager in Kilkee in late October 2000. Invitations were issued to twenty tourism providers in the West Clare region, selected from records of the attendees at Marine Institute meetings held earlier that year, for the purpose of establishing a cluster group, prior to the appointment of a project manager. There was an attendance of twelve at the information session, all of whom signed up to form the META- cluster group. An information leaflet on the META- project and a future action plan for the cluster group was supplied. Feedback on the aims of the META-project was very positive and it was agreed to meet on a regular basis to further the objectives of the project. Between October 2000 and April 2001, the group met ten times to develop a strategy for marketing West Clare as an ecotourism destination. During this period, the group developed to consist of sixteen core members.

Initially the group were informed of the expected outcomes, their expected role, the role of the project manager and the timescale involved in the West Clare META-project. The project manager adopted a leadership role in the early stages of the cluster group involvement. As the project progressed and the cluster group became more active, the project manager stepped into the role of facilitator to the group. This eventually led to the cluster group becoming independent and establishing the IRRUS marketing group in February 2001 with an elected chairperson, secretary and committee.

2.2.3. Capacity and Awareness Building

In parallel to the META-project, the Marine Institute in co-operation with CERT (The National Tourism Training Agency) and Galway-Mayo Institute of Technology initiated a pilot training programme in Kilrush, West Clare to train guides in the skills required to interpret marine and coastal environments. The Marine and Countryside Guides initiative developed by the Marine Institute and CERT in 1996 offers a suite of training programmes for professional guides. The programmes are designed for people who provide or wish to provide a range of guiding services to visitors. They consist of two components: Core Marine and Countryside Guiding and a Specialisation Module. The core module focuses on tourism marketing, customer care, group guiding skills and a continental language, while the specialisation modules include game angling, multi-activity marine pursuits and marine interpretation. The specialisation module offered in West Clare was marine interpretation. This was the first time this module had been offered through the programme. The West Clare META- project manager delivered the marketing and tourism sections of the course providing overlap and links with the objectives of the META-project. Participants on the course included members of the META- cluster group. Those who successfully complete the programme will be awarded with an advanced Certificate in Marine and Countryside Guiding from the National Tourism Certification Board. National

certification is based on practical assessment, continuous assessment and assignments. This pilot training programme is due for completion in early 2002.

In addition, a series of marketing workshops were delivered through the West Clare META- project in conjunction with Shannon Development Ltd. and CERT. These were available to the META- cluster group and to the participants of the Marine and Countryside Guide course.

1. The first workshop was delivered by CERT in December 2000, through a half-day e-commerce course entitled *'Introduction to the NET'*. Through practical applications and case studies, this course demonstrated the advantages of on-line marketing and the pros and cons of designing a website.
2. The Shannon Development marketing workshop held in February 2001, detailed community based tourism projects in the Shannon Region, how to plan a marketing strategy and the role of the regional marketing agencies. This workshop led to further ongoing work between the META- cluster group and the Regional Development Agency in the development of a marketing plan for West Clare ecotourism (Section 3.5.2).
3. In June 2001, the project web designers delivered a workshop on website maintenance specifically geared for the website developed by the West Clare META- project (Section 3.3.2).

These capacity and awareness building initiatives helped to increase the promotional skills for marine ecotourism of both the META- cluster group and Marine and Countryside Guide course participants. The interaction between the two groups (cluster and guides) through the workshop sessions helped to improve networking among tourism operators in the region.

SECTION THREE
MEETING THE OBJECTIVES

3.1. Introduction

The objectives of the West Clare META- project were to assess
(1) tourist motivation for ecotourism,
(2) the feasibility of marketing a 'package' of ecotourism activities
(3) the implications of a 'branded ecotourism area' for the sustainable development of marine ecotourism.
(4) the feasibility of promoting packaged ecotourism products using innovative marketing tools, including the internet.

The objectives were implemented by the project manager in conjunction with a selected group of marine tourism operators and accommodation providers from the West Clare area. In this section of the report, the methodology employed to meet the West Clare META- project objectives is detailed and the outcomes assessed.

3.2. Objective 1: To assess tourist motivation for ecotourism

To achieve this objective a visitor questionnaire survey was carried out between August 8 and September 1, 2000, in West Clare. A similar survey was carried by all three META-partners in their respective study areas.

3.2.1. Questionnaire design

The survey questionnaire was designed to be transnational so that comparative results could be obtained from all three project partner areas. Each of the partners submitted relevant questions with regard to their own project areas to the lead partner UWE, Bristol. These were amalgamated by the Lead Partner (UWE) into a generic questionnaire form which contained 32 questions (Appendix I).

In West Clare this questionnaire was further adapted to three types of sampling sites – activities, accommodation and the Killimer-Tarbert ferry crossing. The adaptations consisted of specific questions being included relevant to the site e.g. the questionnaire used on the dolphin boats had a question related to dolphin watching, while that used at the dive centre had a question related to diving. There were therefore three variants of questionnaire used in West Clare based on the common META- project type. The questionnaire had three sections: (a) visitor profile, (b) awareness of project area and marine ecotourism activities and (c) attitudes to ecotourism.

3.2.2. Sampling

The sampling sites in West Clare were divided into 3 types
(1) the ferry crossing (Killimer-Tarbert)
(2) activity based centres
(3) accommodation centres and tourist information sites

Sampling was completed through face-to-face interviews at the ferry crossing by trained interviewers and through self-completion by visitors at all other locations. A total of 410 questionnaires was completed in West Clare from 17 sampling sites.

3.2.3. Limitations

The extensive questionnaires required time to complete and were often left unfinished by the respondent, especially where the self-completion technique was used. Variance in questionnaire design for the different sampling locations led to difficulty in cross analysis.

Hence, all survey interpretation is related to the ferry sample and is representative only of visitors using the ferry crossing and not of the wider visitor population of West Clare.

3.2.4. Analysis

Frequencies for all sampling sites were compiled using SPSS computer software.
Because of the variances in questionnaire design for the different sampling locations, and the very small number of samples obtained through self-completion, analysis using all completed questionnaires was difficult. The largest sample number was obtained through the face-to-face interview techniques used at the ferry crossing (a total of 335) and for the purposes of accuracy only the ferry samples were interpreted.
Due to the nature of the ferry crossing sampling point, initial analysis showed a distinct breakdown in the sample population into holidaymakers and passing through traffic (Chart 3.1). Where relevant to the information being sought, it was decided to interpret separately for these two population types, as detailed below.

3.2.5. Results

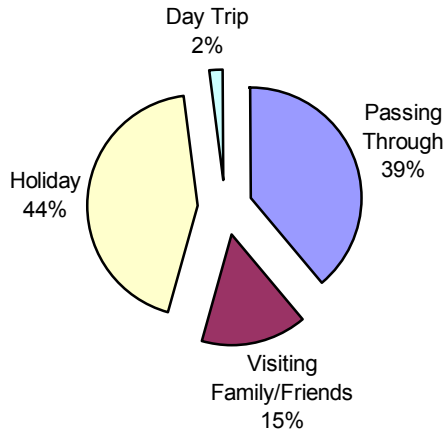
The results for each of the three sections of the questionnaire (profile of visitors, awareness of West Clare and attitudes to ecotourism) are detailed and summarised separately and conclusions are then drawn in terms of marine ecotourism development in West Clare.

3.2.5.1. Visitor Profile

(a) Reasons for visiting

44% of respondents were on holiday, 39% were passing through, 15% were visiting family/friends and 2% were on a day trip. For the purposes of interpretation, those visiting family and friends were taken as being on holiday while those on a day trip were amalgamated with those passing through. This resulted in a breakdown of the sample into 59% holidaymakers and 41% passing through the region.

Chart 3.1: Reasons For Visiting



(b) Origin of Visitors
Of the total number of respondents classified as holidaymakers, 57% were from Ireland, including Northern Ireland. The largest single percentage of overseas visitors came from the UK (25%) with the second highest from USA (10%) and the third from Germany (3%).

Of those respondents classified as passing through the region, 49% were from Ireland including Northern Ireland, 23% were from the UK, 14% from the USA and 8% from Germany.

(c) Repeat visits
56% of holidaymakers were on a first time visit to West Clare. Of those holidaymakers that had visited West Clare more than once, 44% were Irish and 17% English. Other nationalities showed such small samples as to be inaccurate to represent in percentages. Only 20% of holidaymakers were staying in West Clare for the whole duration of their holiday.

47% of those passing through had been in West Clare more than once.

(d) Accommodation
44% of holidaymakers to West Clare used Bed & Breakfast accommodation,
16% used self-catering, 12% used hotels, 5% used family homes, 5% used caravans, 4% hostel, 2% campsite, 5% other (unspecified) and 7% did not use accommodation in West Clare.

81 holidaymakers used Bed & Breakfast accommodation, 37 were Irish, 12 American, 9 Northern Irish, 6 English, 5 Italian, 3 German, 2 Australian, 2 Canadian, 1 French, 1 Scottish, 1 Spanish and 2 other Europeans.

29 holidaymakers used self-catering accommodation, 15 were Irish, 8 English, 3 Northern Irish, 2 American and 1 Canadian.

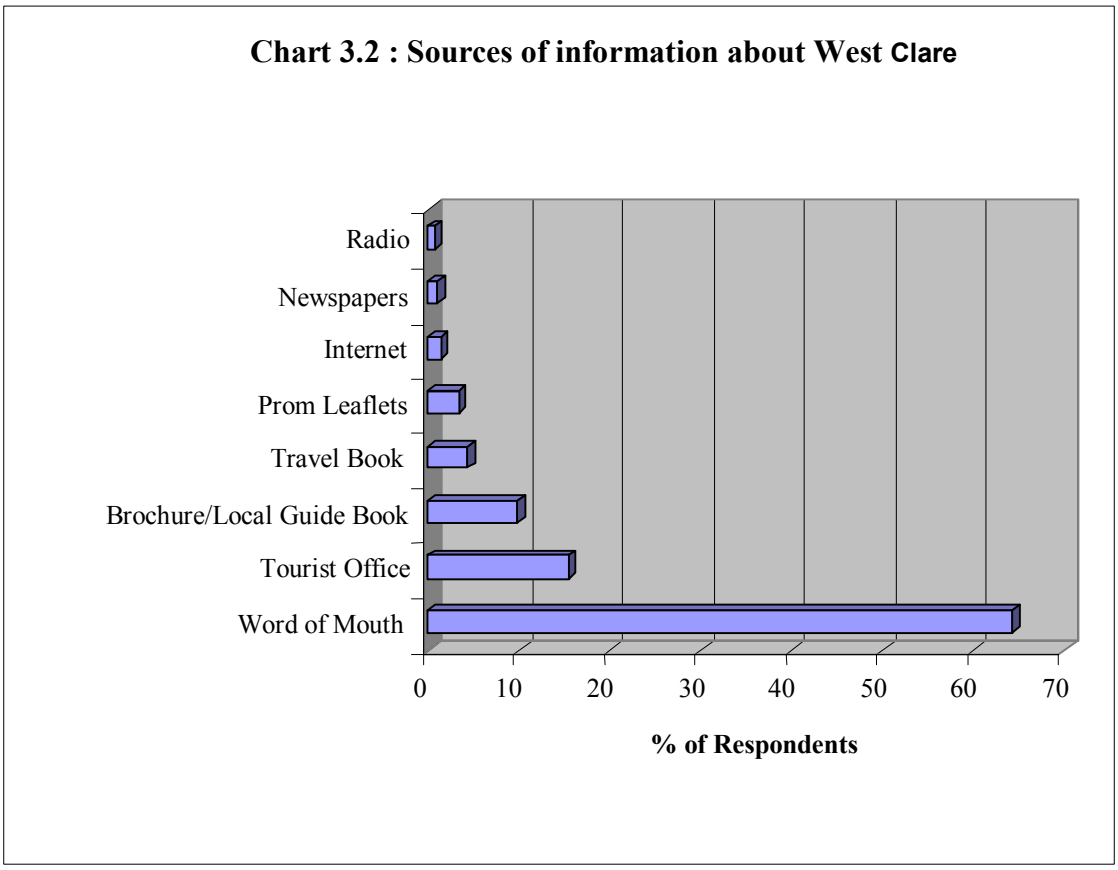
22 holidaymakers used hotels, 14 were Irish, 3 English, 1 American, 1 Benelux, 1 French, 1 Italian, and 1 Scottish.

10 holidaymakers used family homes, 6 English, 2 Irish and 2 American.

8 holidaymakers used caravan accommodation, 3 Irish, 2 English, 1 Northern Irish, 1 German, and 1 Welsh.

7 holidaymakers used hostel accommodation, 5 Irish, 1 Northern Irish and 1 German.

(e) Sources of Information

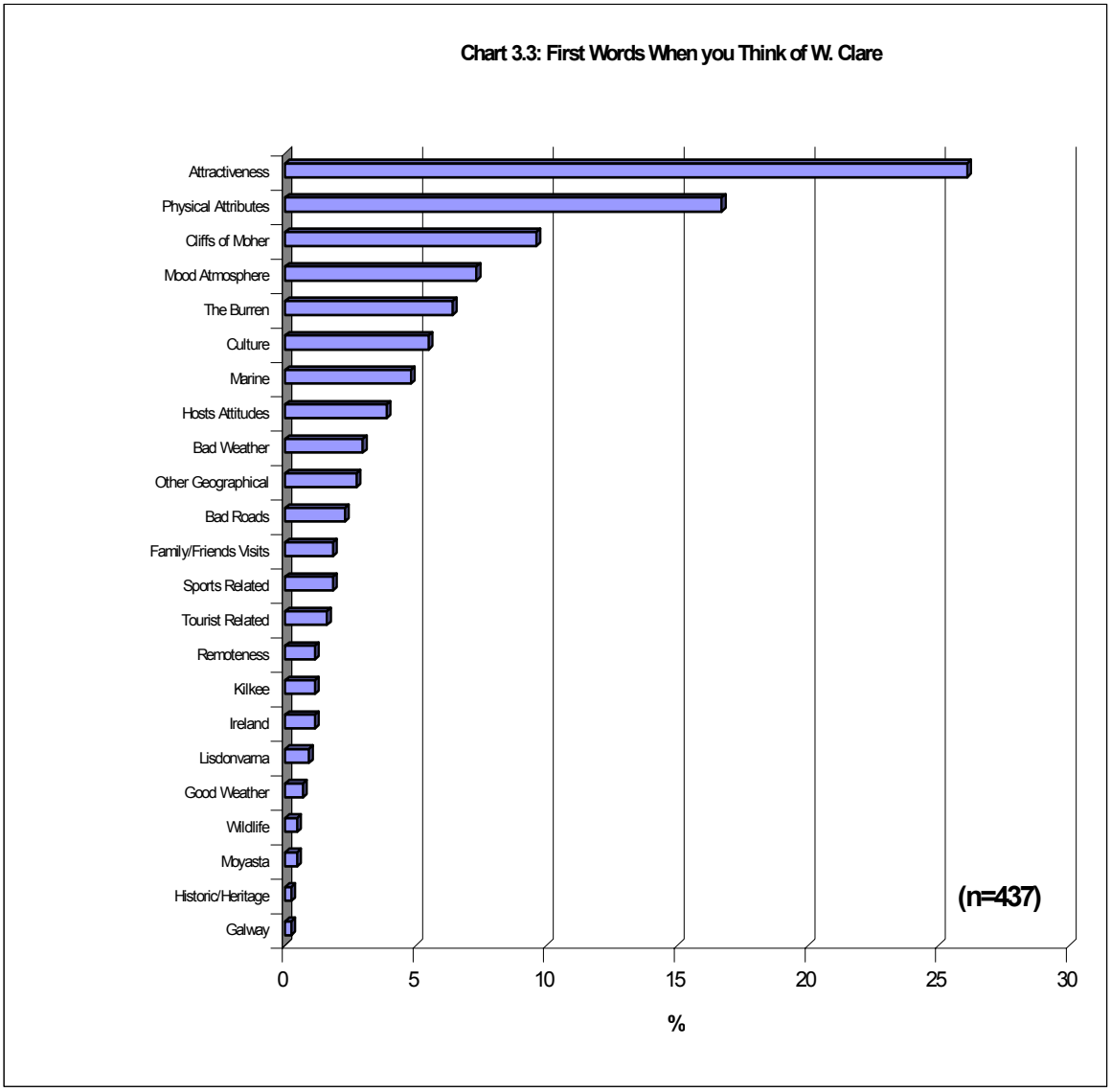


64% of respondents indicated that word of mouth was the most important source of information about West Clare. 15% of respondents obtained their information through tourist offices, while 10% used brochures and local guidebooks. Specific travel books mentioned by respondents included the Michelin Guide, the Rough Guide and Lonely Planet.

3.2.5.2. Awareness of West Clare

(a) Characteristics associated with West Clare

Each respondent was asked to provide the first words that came to mind when they thought of West Clare. The top 5 responses were scenery and landscape related characteristics (Chart 3.3). However the responses recorded indicated a very low awareness of the actual location of West Clare, a fact also noted by the survey interviewers.



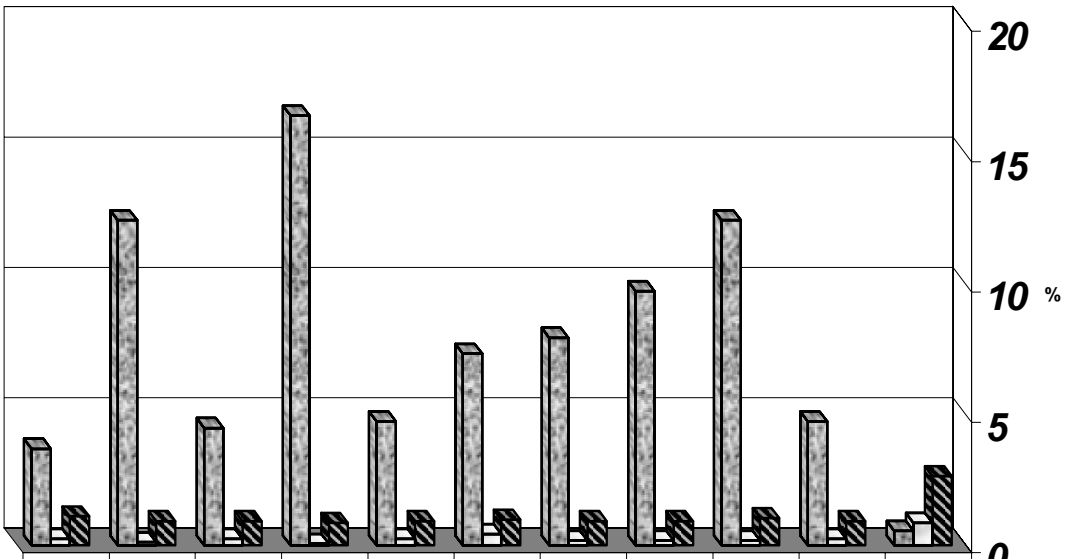
(Note: the total sample number for this question is 437, as respondents often associated West Clare with more than one of the above attributes)

The Cliffs of Moher and the Burren scored highly, showing a strong awareness of the well-marketed regions of North Clare. In general, the responses to this question are attributes which can be related to many parts of Ireland e.g. scenery, peace and quiet, friendliness of the people etc. and are not site specific. As over 45% of respondents were Irish in origin, the low awareness of West Clare as a distinct region is particularly notable.

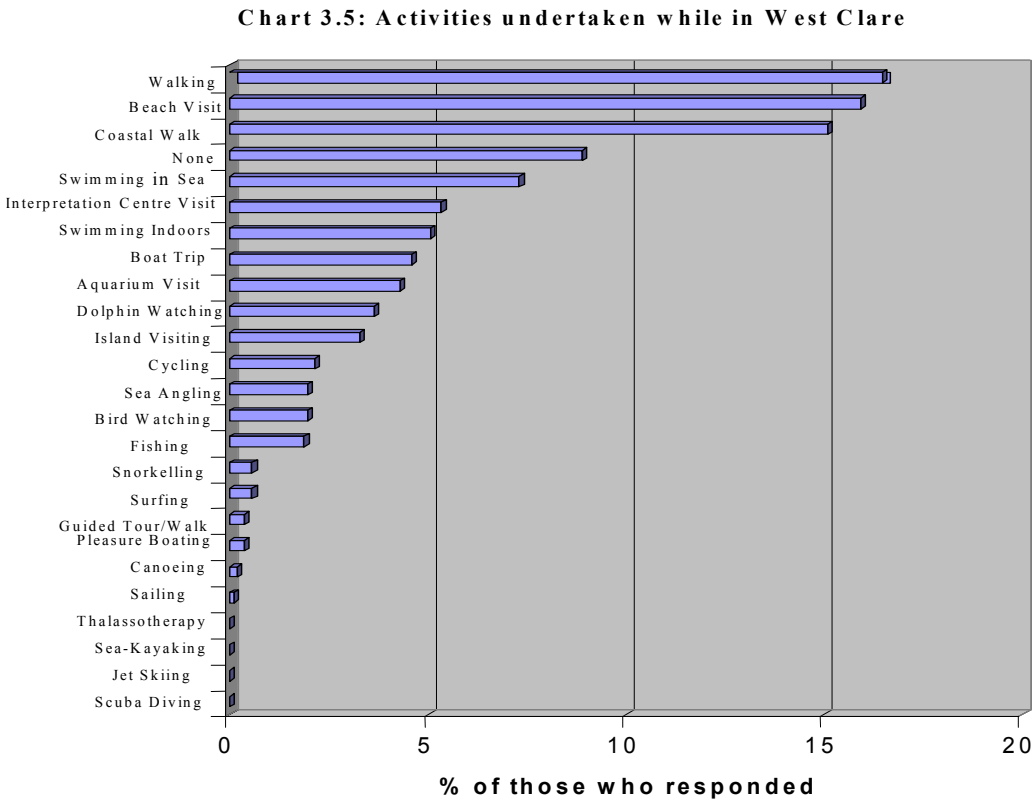
(b) Activities associated with West Clare

A further question specified a number of tourism related activities available in West Clare and asked if the respondent associated these activities with the region. (Chart 4) 16% of the sample associated the area with cliffs, 12% with walking, 12% with music, 10% with heritage, 8% with nature watching and 7% with dolphins. Given that there could be a 100% response to each suggested activity the awareness of the availability of these activities in West Clare is extremely low. Marine ecotourism activities such as nature watching, dolphin and bird watching, diving, sailing and surfing all scored below 10% awareness.

Chart 3.4: Activities associated with West Clare



	Surfing	Walking	Diving	Cliffs	Bird Watching	Dolphins	Nature Watching	Heritage	Music	Sailing	Thalassotherapy
Yes	4	12	5	16	5	7	8	10	12	5	1
No	0	0	0	0	0	0	0	0	0	0	1
Don't Know	1	1	1	1	1	1	1	1	1	1	3



Respondents were asked if they had undertaken any of a series of specified activities during their stay in West Clare. The results show the most popular activities to be walking, visiting the beach, swimming in the sea and indoors, and visits to interpretative centres. A preference for swimming and visits to interpretative centres was again indicated when respondents were asked to nominate which places they visited while in West Clare. The following results were obtained:

Activity	**Percentage who visited**
Kilkee Waterworld	32%
Kilrush Heritage Centre	18%
Shannon Seafari dolphin boat, Kilrush	10%
Dolphinwatch, Carrigaholt	9%
Scattery Island Interpretative Centre	6%
Scattery Island Ferry	6%
Vandeleur Gardens, Kilrush	5%
Kilkee Dive Centre	5%
NatureQuest Centre, Blackweir	5%
Kilrush Creek Adventure Centre	3%
Saoirse Seasports	1%
Thalassotherapy Centre Kilkee	0

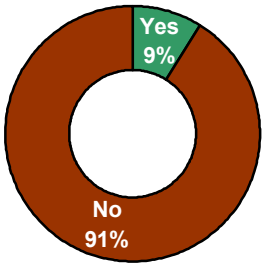
Table 3.1: Activities undertaken by visitors to West Clare

3.2.5.3. Attitudes to Ecotourism

(a) Eco-organisation membership

Of the 312 people who responded to the question of whether or not they were members of any organisations involved with the conservation of wildlife or the natural environment, only 27 were members.

Chart 3.6: Are you a member of any organisations invovled with the conservation of wildlife or the natural environment?



Of the 27 respondents who were members of such organisations, 7 were Irish, 7 Americans, 6 English, 2 German, 2 Australian, 1 other European, 1 Northern Irish and 1 Welsh. These figures show the nationalities of the eco-organisation members, but when examined in the context of each nationality sample the result is more accurate.

Of the total Irish population within the sample only 5% were eco-organisation members. 10% of the English sample were members. 12.5% of the German population, 21% of the American sample population and 50% of the Australian sample population were eco-organisation members.

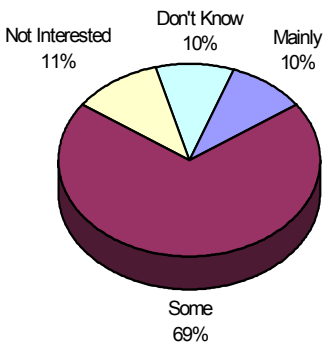
(b) Preferred structure of an ecotourism package

When asked whether the respondent would choose a holiday

(a) mainly for the ecotourism experience
(b) for some ecotourism experience
(c) would not be interested in an ecotourism experience or
(d) don't know

the results indicated in Chart 3.7 were obtained

Chart 3.7: Proportion of ecotourism experience desired in holiday package



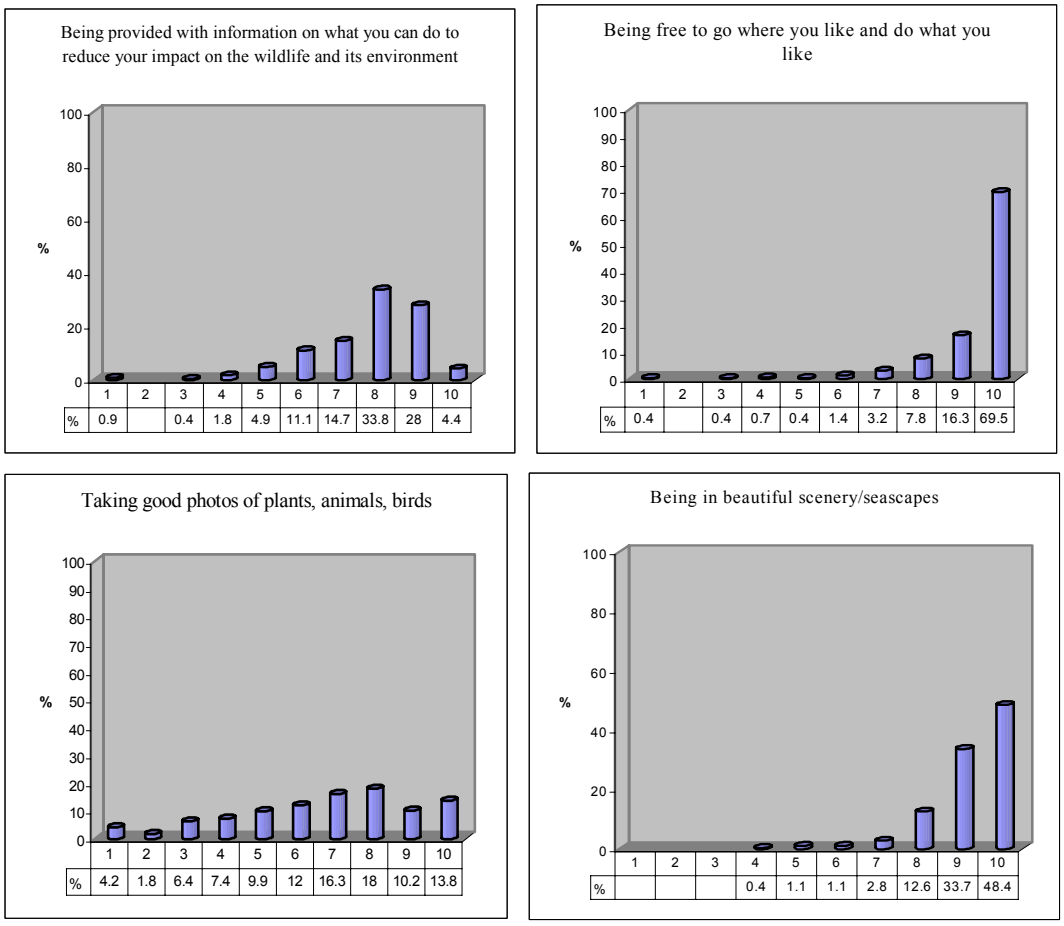
This response clearly supports the argument that the ecotourism product is desirable but cannot stand on its own and must be integrated with other tourism activities. Marketing packages should therefore be built with this in mind.

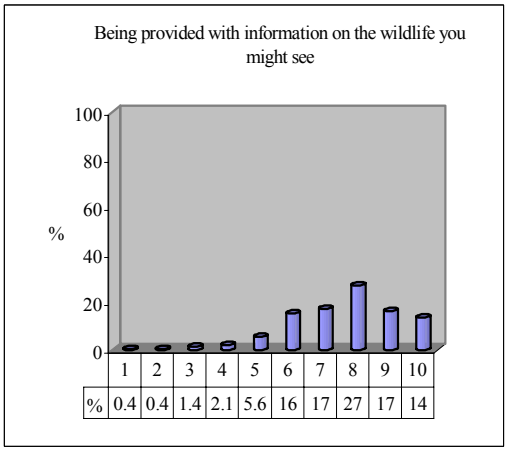
This result is further supported by the fact that of the 27 members of eco-organisations recorded only 4 of these respondents would choose a holiday mainly for the ecotourism experience while 20 preferred some ecotourism experience. Of the others, 2 said they were 'not interested' and 1 replied 'don't know'.

(c) Ranked importance of Components of Ecotourism Package

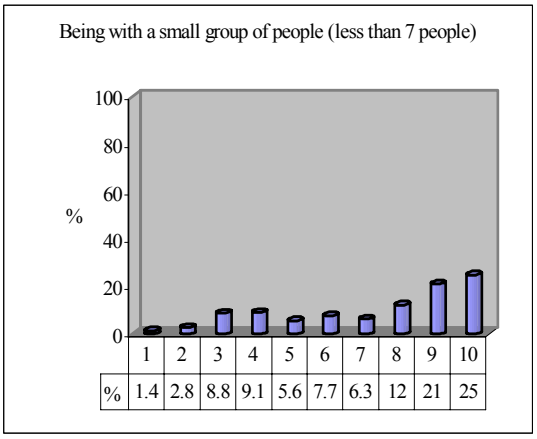
The following charts show how important the respondents felt certain stated factors would be to the enjoyment of the activities they undertake. Responses were graded on a scale of 1 to 10 with 10 being the highest level of importance.

Chart 3.8: Ranked importance of Components of Ecotourism Package

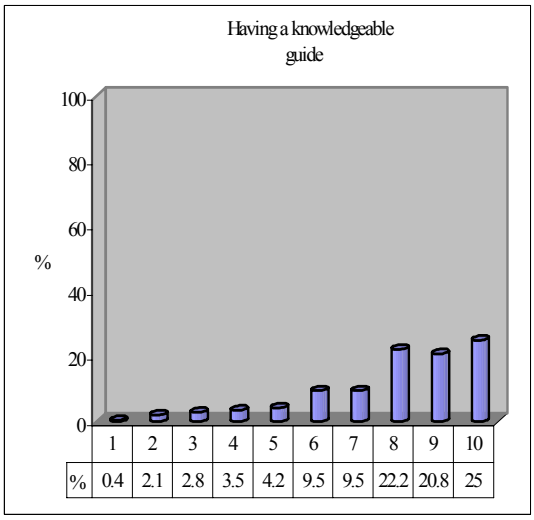




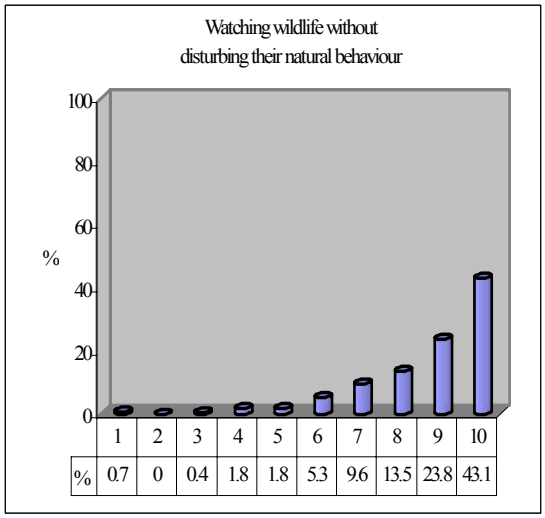
	1	2	3	4	5	6	7	8	9	10
%	0.4	0.4	1.4	2.1	5.6	16	17	27	17	14



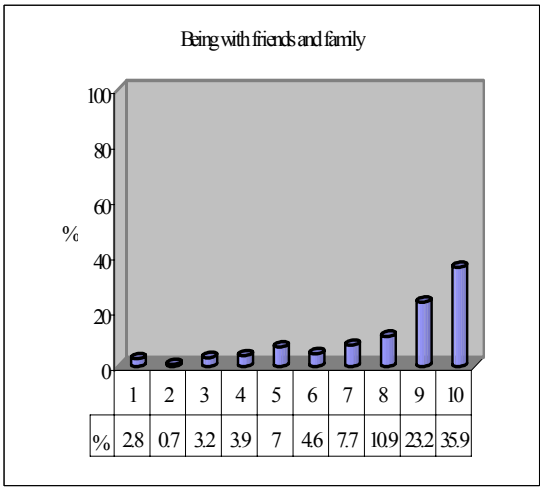
	1	2	3	4	5	6	7	8	9	10
%	1.4	2.8	8.8	9.1	5.6	7.7	6.3	12	21	25



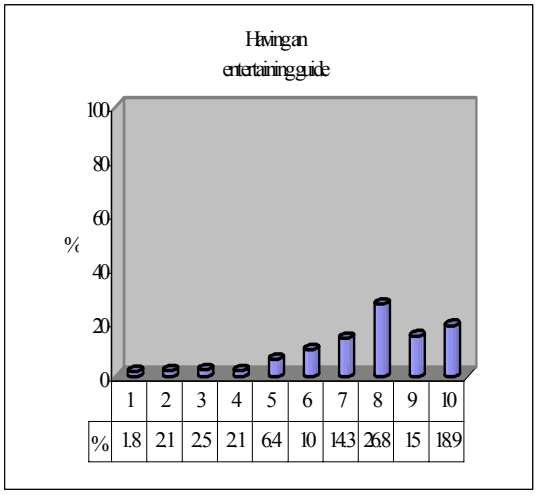
	1	2	3	4	5	6	7	8	9	10
%	0.4	2.1	2.8	3.5	4.2	9.5	9.5	22.2	20.8	25



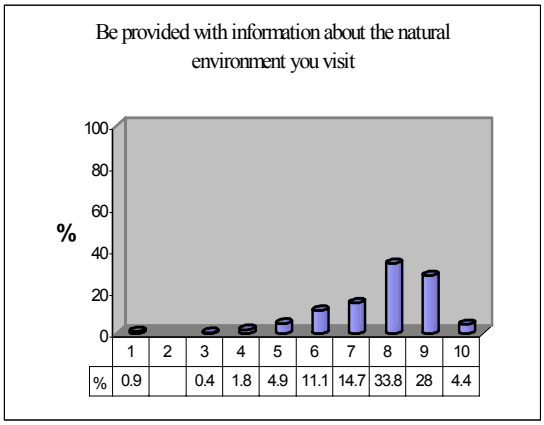
	1	2	3	4	5	6	7	8	9	10
%	0.7	0	0.4	1.8	1.8	5.3	9.6	13.5	23.8	43.1



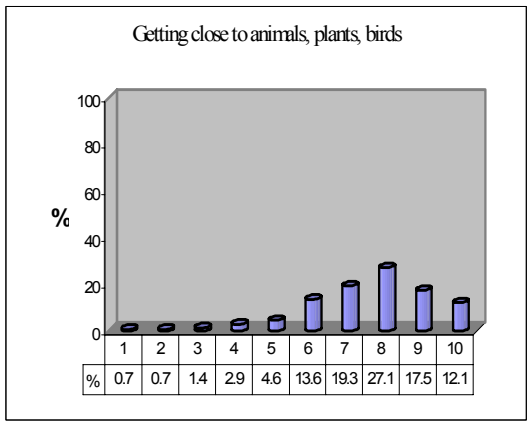
	1	2	3	4	5	6	7	8	9	10
%	2.8	0.7	3.2	3.9	7	4.6	7.7	10.9	23.2	35.9



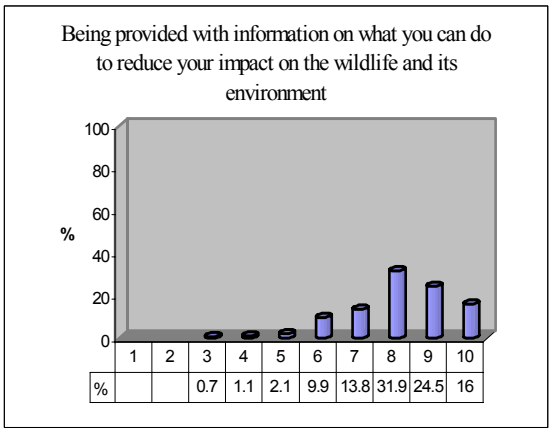
	1	2	3	4	5	6	7	8	9	10
%	1.8	2.1	2.5	2.1	6.4	10	14.3	26.8	15	18.9



	1	2	3	4	5	6	7	8	9	10
%	0.9		0.4	1.8	4.9	11.1	14.7	33.8	28	4.4

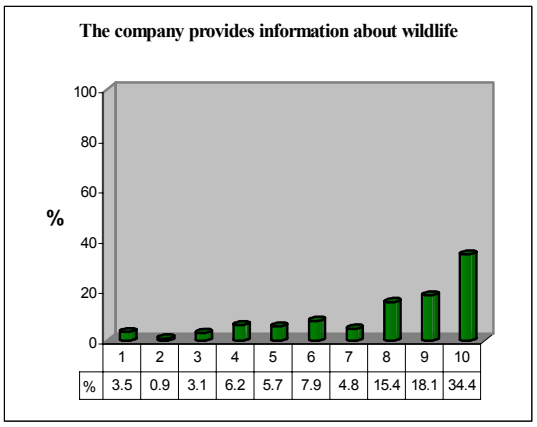


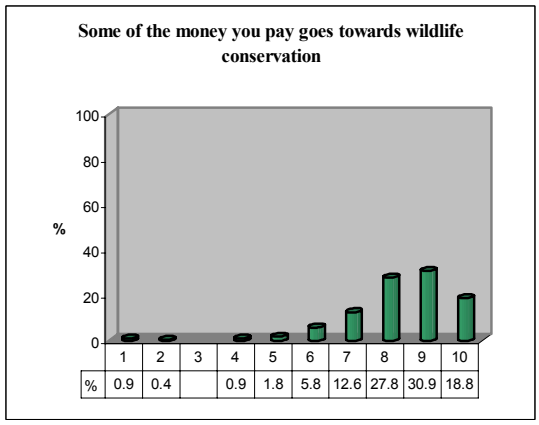
	1	2	3	4	5	6	7	8	9	10
%	0.7	0.7	1.4	2.9	4.6	13.6	19.3	27.1	17.5	12.1

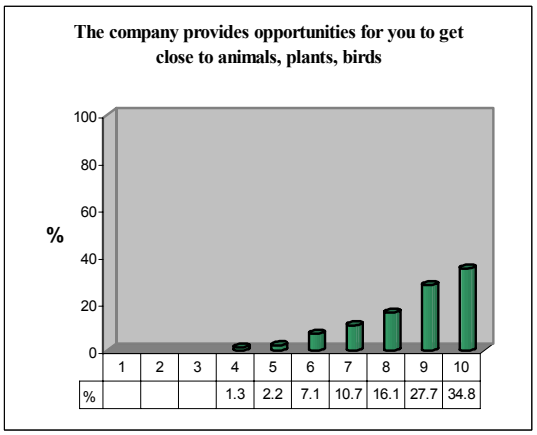


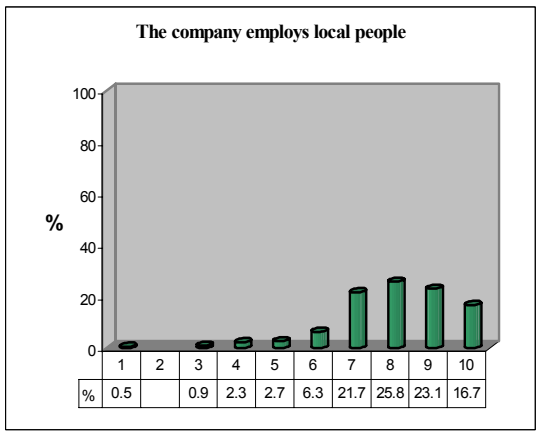
	1	2	3	4	5	6	7	8	9	10
%			0.7	1.1	2.1	9.9	13.8	31.9	24.5	16

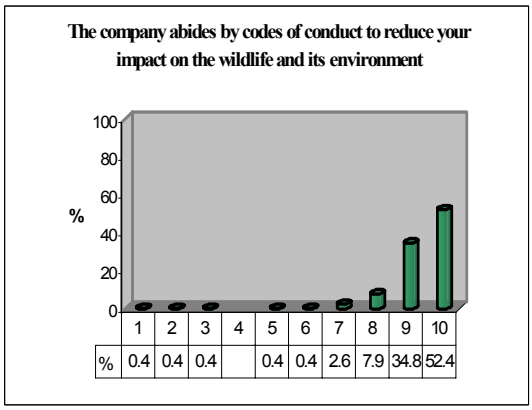
The importance of certain factors to the respondent if the activity was provided by a tour company or other organisation are illustrated below, using the same ranked scoring method:

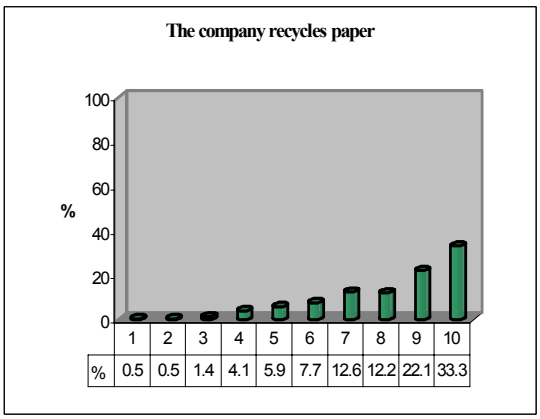


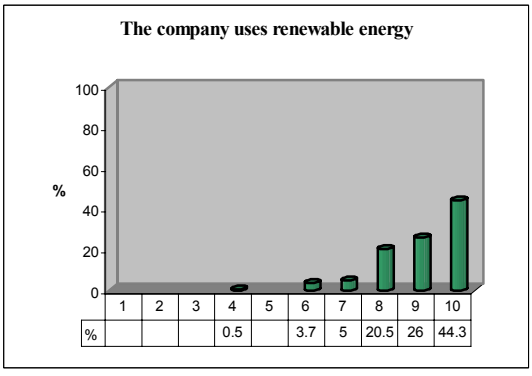


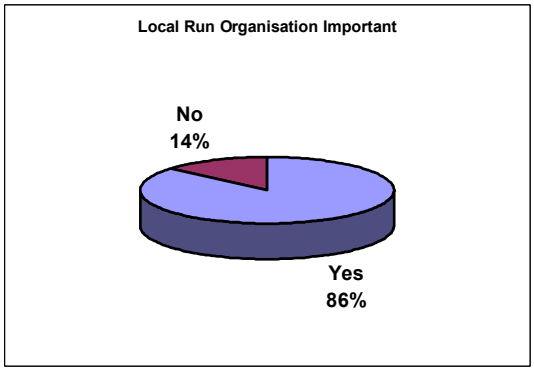












(d) Definition of Ecotourism
When asked what the word 'ecotourism' meant to the respondents, the following concepts emerged:

- Not damaging the environment
- Conservation
- Awareness
- No rubbish
- Caring for wildlife
- Clean water, air, beaches, towns
- Not disturbing nature but enjoying
- Money reinvested into environment
- Green tourist
- Information on environment for tourists
- Looking but not impacting
- Pseudo packaging of tourism
- Sustainable

(e) West Clare as an ecotourism destination
When the respondents were subsequently provided with a definition of ecotourism and asked whether they considered West Clare as an ecotourism destination, 70% answered positively.

(f) Ecotourism and education
78% of respondents agreed that 'ecotourism improves people's experience about the visited area', 93% agreed that 'ecotourism increases understanding and respect for the marine environment' and 88% agreed that 'tourists who engage in ecotourism activities are more likely to adopt behaviour that promotes conservation and protection of the environment'. 85% disagreed with the statement that 'ecotourism interferes with people enjoying themselves'.

3.2.6. Summary of Objective 1 Outcomes
The nationality profile of holidaymakers in West Clare shows a strong domestic market and a high percentage of repeat visitors. The second largest market is the UK, again showing a high percentage of repeat visitors. The single most important accommodation type was Bed & Breakfast (44%), accounting for almost half of all accommodation use. Of the total sample using B&B accommodation, 46% were Irish. The next most popular accommodation type was self-catering (15%), followed by hotels (12%) and family homes (5%). 57% of holidaymakers heard about West Clare through word-of-mouth. This reflects the strong domestic market and repeat visitor pattern. However, this strong domestic market of repeat visitors is at odds with the level of awareness of West Clare as a distinct holiday region. Holidaymakers do not appear to identify with the label of 'West Clare' and make little distinction between it and other regions of County Clare e.g. North Clare.

The main feature-associations respondents had with West Clare were scenery and landscape. There was a very low awareness of the available tourism resources in the area. A large number of visitors to the region engaged in outdoor activities. The most popular activities undertaken were walking and swimming. A very low percentage undertook

organised marine activities. The awareness of the availability of these activities was recorded as low. Only 7% of respondents associated West Clare with dolphins, and only 5% associated it with bird watching. Increased marketing is needed to raise awareness of the tourism resources in the West Clare area.

The West Clare ecotourism survey illustrated that the 'dedicated wildlife watcher' type of ecotourist is in the minority. This became evident when the respondents were asked whether they would choose a holiday (a) mainly for the ecotourism experience (b) for some ecotourism experience (c) would not be interested in an ecotourism experience or (d) don't know. Only 10% chose (a) while 69% chose (b). Respondents to (b) could be classified as 'casual nature-based tourists' as they would like an ecotourism experience but as a part of their normal holiday experience. This point was even more strongly emphasised when only 27 out of 312 respondents were members of any organisation involved with the conservation of wildlife or the natural environment and of those 27 respondents only 4 would choose a holiday 'mainly for the ecotourism experience', while 20 chose 'some ecotourism experience'. There was therefore a moderate or superficial environmental commitment from the majority of respondents. This response clearly supports the argument that the ecotourism product is desirable but cannot stand on its own and must be integrated with other tourism activities. Marketing packages should therefore be constructed with this in mind.

The respondents showed a strong preference to be free to go where they like and do what they like i.e. an ability to roam. Good scenery is a high priority. Smaller groups were strongly preferred by over 50% of the respondents and there was a preference for undertaking ecotourism activities with friends and family. Respondents indicated a preference that a guide should be both informative and entertaining, with information being the more strongly desired trait. It was important to the respondents that they can get close to animals, plants and birds while undertaking the activity. It was even more important that they could watch wildlife without disturbing its habitat and that information is provided on the wildlife, natural environment and how to reduce impact as a visitor on these resources.

The responses highlighted the importance that an ectourism operation is locally run, provides information on wildlife, provides opportunities to get close to animals, abides by codes of conduct, uses renewable energy and recycles paper.

3.3. Objective 2: To asses the feasibility of marketing a 'package' of ecotourism activities using innovative marketing tools.

To market a 'package' of ecotourism activities the owners and operators of the various activities have to be involved. This involvement was achieved through the development of the META- cluster group. Their participation in the project was enhanced through a series of capacity and awareness building exercises and through their direct involvement in the development of the promotional tools. This participation at a local level is vital to the sustainability of the product to be developed. Local ownership of the marketing from the outset will determine its long-term viability. Continued participation by a core group and perceived success in the branding of the West Clare ecotourism project will encourage participation by others in the future. A core group of sixteen (the META- cluster group) have been involved in the development of the promotional tools from the onset. The core group was maintained at this level of membership until the marketing materials were publicly launched for promotional purposes and more importantly until the criteria for inclusion of members under the brand image were finalised. It was vitally important that a standard for inclusion under the brand image was established. This standard was designed to adhere to the principles of ecotourism as defined by the META-project. Only operators who satisfy the standard will be allowed to market themselves under the West Clare ecotourism brand image.

The following section details how the marketing materials for the West Clare ecotourism product were developed.

3.3.1. Developing a Brand image

- Discussions were held with the Tourism Development Section of Shannon Development Ltd. on branding, promotional literature and test marketing. The use of graphic designers, marketing plans and map production were also discussed. The Tourism Development Section offered to act in an advisory capacity to the West Clare META- project and contact was maintained throughout the project.

- A brainstorming session was held with the META- cluster group to establish a priority listing of images of West Clare that should be portrayed through the brand image. The strongest images were cliffs, seascapes, clean environment and the dolphins.

- A brief for brand name and logo design was prepared by the META- project manager (taking account of Shannon Development advice and the suggestions of the META- cluster group) and forwarded to three design companies. A designer was commissioned and a series of visuals were reviewed by the META- cluster group (over a series of three meetings) until a final design was agreed. Comments were also invited from Shannon Development Ltd. and the Shannon Dolphin and Wildlife Foundation.

- The brand name IRRUS was selected by the META- cluster group after reviewing several options. IRRUS is an old Irish name for the region of West Clare, which was first used in the sixth century. It translates as 'peninsula'.

Fig. 3.1 IRRUS Brand Logo

- The brand name and logo were subsequently carried through to the production of car stickers, membership stickers, promotional poster, leaflets, the website and a promotional map and guide booklet. A compact disk containing the specifications for the printing of the brand image and its application to stationery and promotional materials has been developed and made available to IRRUS brand members. This will prevent the brand being misrepresented in future printing e.g. wrong use of colours, shape etc.

3.3.2. Web site

Consultations were held with Shannon Development Ltd., Kilrush Urban District Council and the META- cluster group to determine what promotional web sites currently existed for the West Clare region and how the proposed ecotourism website could interlink with these existing sites. The main site, which had been in operation, was www.westclare.com, which was owned by Clarewest Ltd., a local community organisation funded under the LEADER programme. In the recent past this company had been disbanded and the sale of the website and the company were offered to the META- cluster group. It was decided that the website as it existed was not relevant to the ecotourism project and it was thought best to design a website specifically to promote marine ecotourism in West Clare under the developed brand image. If the existing West Clare web site were purchased it would simply be for the use of the domain name. It was agreed by the cluster group that the word IRRUS should form the domain name as it would be carried through all promotional literature. The meta tags within the website would carry words such as West Clare, ecotourism, Ireland etc. and so would answer to a search on such subjects.

Shannon Development Ltd. has designated Kilrush as a focus town for development in the Shannon Region. As part of this designation a website would be developed to promote the town for economic, social and environmental development. Discussions were carried out with Shannon Development and Kilrush Urban District Council (UDC) to examine the possibilities of developing a joint web site for the town of Kilrush and the West Clare

META- project. It was agreed, however, after proceeding almost to design level, that the objectives of both web sites were too disparate for design purposes and consensus could not be agreed on designers.

A brief for website design for the IRRUS ecotourism site was submitted to three designers. The West Clare META- cluster group and project manager agreed to commission the designers of the brand image so that there would be a consistency of design throughout all promotional materials.

The IRRUS website contains five main informational pages. These cover the marine ecotourism topics of dolphins, birds, marine life, geology and history. Other pages include the homepage, accommodation, guest page, postcards, links and directions for locating West Clare. The site also includes a detailed map of West Clare indicating the locations of the various marine ecotourism activities. The IRRUS website acts as a portal site with links to brand members sites. Visitors can make bookings through the individual members' sites. Links are carried on the accommodation pages and relevant pages to the brand member e.g. dolphin watching boat links are on the dolphin page. The site went live on February 19, 2001. www.irrus.com

3.3.3. Map

A map of the West Clare region for the promotion of ecotourism sites and activities was commissioned (Map 3.1). This formed a central part of the website and was also used in the IRRIS Marine Ecotourism map and guide booklet (Section 3.3.4.). Discussions with Shannon Development on map production indicated that a map produced for the 'Burren Tourism & the Environment Initiative' carried out in North Clare, in 1999 was a highly successful promotional tool. The same cartographer was commissioned for the West Clare META- project. The map for West Clare was developed to have similarities in design to the Burren map and would be adaptable in any possible future joint marketing activities between the two regions.

3.3.4. Promotional Literature

A full colour 28-page guide booklet promoting the ecotourism activities of West Clare was designed to fit inside an 8-panel brochure. This design was developed to allow for the future production of the 8-panel brochure as a stand-alone product, if the IRRUS marketing group are unable to finance a full reprint of the booklet in the future. The brochure incorporates the map, general information and contacts for the marine ecotourism activities of the region. The booklet section provides detailed information on the dolphins and whales, birdlife, marine life, geology, people and places. Text was written by experts in the various fields, some of whom are members of the META- cluster group. Photographs were sourced locally as far as possible.

A promotional leaflet providing contact names for activities and accommodation was developed. The META- cluster group felt that this production would be very useful for promotions at trade shows.

An A3 size full colour poster promoting the IRRUS brand and website was designed for tourist offices, accommodation and activity centres, and for displays at holiday fairs etc.

3.3.5. Promotional launch of Brand

A promotional launch of the IRRUS marketing group and the promotional materials was organised by Shannon Development Ltd. and held in Kilkee on June 6, 2001. The launch was preceded by a seminar to review the implementation of the recommendations of the *'Special Interest Marine Tourism in the West Clare Peninsula'* report (Marine Institute et al, 1999). The seminar and launch were attended by the original panel of consultees for the report, members of the IRRUS group, the Marine Institute, tourism officials from Bord Failte (the National Tourism Board), Shannon Development, other regional tourism organisations and tourism providers from the West Clare region. Press coverage was provided at a local and national level.

3.3.6. Summary of Objective 2 Outcomes

The development of a 'package' of marine ecotourism activities using promotional tools such as the internet, guide booklets, posters, leaflets etc. was feasible due to the availability of funding and a full-time project manager through the META- project. Local stakeholders were very willing to become involved in the project and to provide their support and time to assist in the production of these materials, as this would benefit the marketing of the area and ultimately the individual businesses. Developing the brand and achieving consensus on design and name was a process which took approximately two months. This was mainly due to the level of consultation employed, the fact that it was the first task undertaken by the META-cluster group and the importance of 'getting it right' as all future promotional materials would be designed around this image. A successful promotional launch of the IRRUS materials was held in June 2001 and a substantial amount of local and national press coverage resulted. Marketing the 'package' of marine ecotourism activities has yet to be truly tested as the timescale involved in the META- project was too limited to test the marketing strategy. It will be necessary to monitor and evaluate the effect of the marketing strategy over a longer timescale to determine whether or not it is successful in selling West Clare as a marine ecotourism destination.

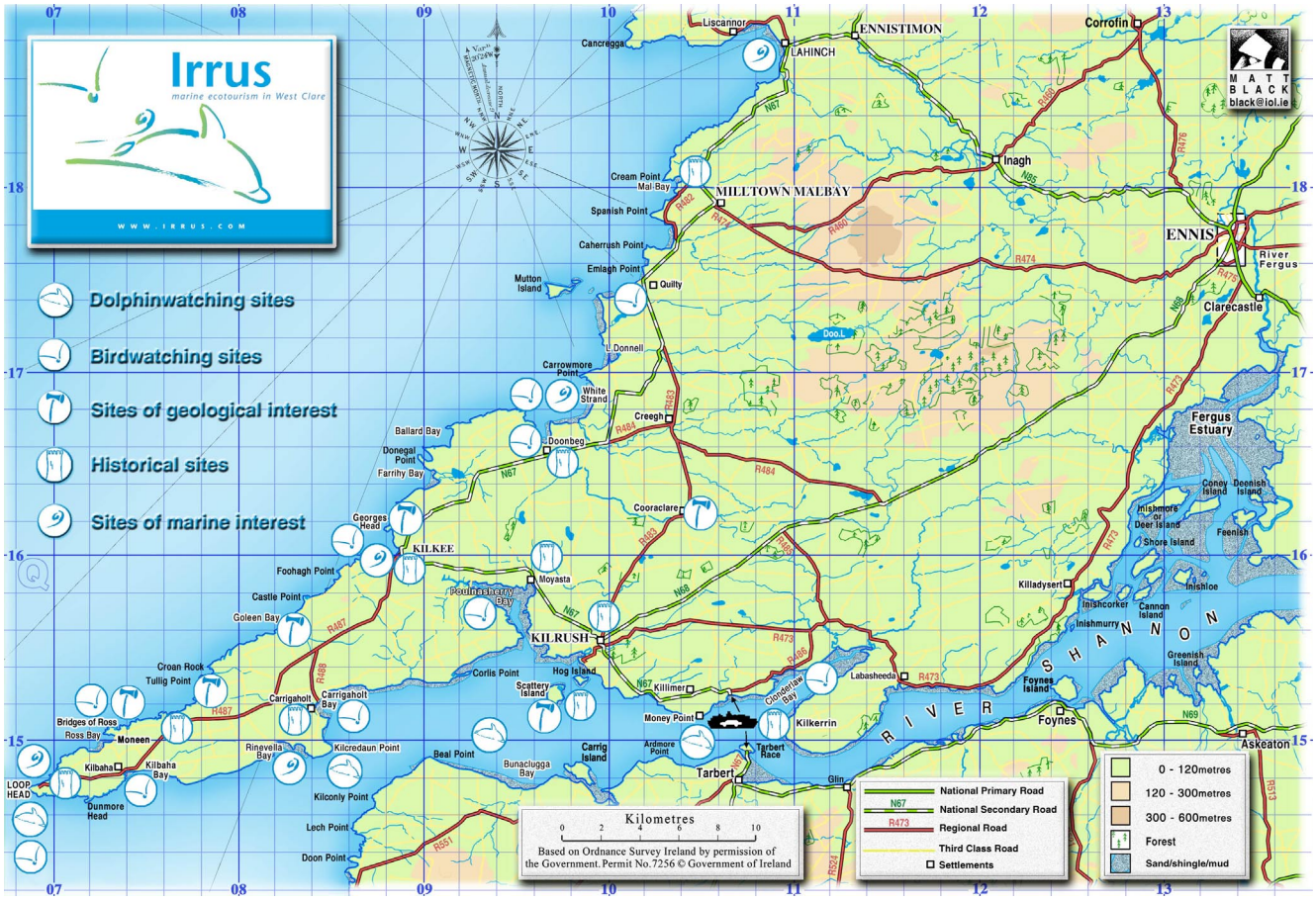
3.4. Objective 3: To assess the implications of a 'branded ecotourism area' for the sustainable development of marine ecotourism.

3.4.1. Development of brand criteria

West Clare was branded as a marine ecotourism destination using the brand image and IRRUS name as detailed previously. A series of operating criteria for inclusion under the IRRUS brand were drafted and agreed upon by the IRRUS marketing group. The criteria are divided into general for all brand members, and specific for the sector to which the member belongs e.g. accommodation sector, nature tour operator etc. (Appendix II). The general criteria have been printed as a charter to be displayed by all brand members on their business premises.

3.4.2. Summary of Objective 3 Outcomes

The implications of branding West Clare as a marine ecotourism destination will need to be monitored over a longer time period than was available through the META-project. The brand is currently in its first season of operation (2001) and has not been marketed widely to date. The group currently using the marketing brand is small in number (sixteen operators) and so represent a small proportion of the tourism



Map 3.1: Map of West Clare indicating marine ecotourism resources

operators in the region. The implications of the IRRUS brand were discussed through a workshop session at a seminar held in June 2001 (section 3.3.5). This workshop was organised by Shannon Development Ltd. to review the implementation of the *'Special Interest Marine Tourism in the West Clare Peninsula'* report (Marine Institute et al., 1999). It involved a variety of local tourism operators and representatives of the tourism agencies locally, regionally and nationally. One of the topics raised was that the brand was not representative of the total tourism product of West Clare but of a select group i.e. the marine ecotourism providers. It was felt that if such a brand is to receive funding and be promoted at national and international level it should be more representative and include a larger number of tourism operators. A preference was indicated by both tourism providers and operators that an ecotourism experience should be included as part of a wider holiday package, rather than as a stand alone product (Section 3.2.5.3). It should therefore be determined whether the IRRUS brand should be maintained as an overall brand image for West Clare tourism, with marine ecotourism as a subset of that brand, or the IRRUS marine ecotourism brand as it exists becomes a subset of a new West Clare tourism brand image.

If the brand is to be maintained and marketed, it is vital that a monitoring scheme is put in place to ensure brand members comply with the agreed brand criteria. A quality product must be maintained and monitored. If the brand is not monitored, it is simply another tourism marketing brand as distinct from a genuine ecotourism label. The brand will only be as good as its lowest denominator so brand members failing to comply with criteria should not be allowed to use the brand. A monitoring protocol and independent assessment procedure must be established to assess brand members' compliance with criteria, at least on an annual basis. This assessment procedure should determine who should/should not be allocated the brand for the following year.

3.5. Objective 4: To assess the feasibility of promoting packaged ecotourism products using innovative marketing tools.

3.5.1. Test marketing

The IRRUS web site was monitored by the web designers from February 19 to April 24, 2001 (nine weeks) and a web report compiled detailing the number and origin of hits. There were a total of 24,500 successful hits to the site during this short 9-week period and the most dynamic page was the postcard page, thus acting as a good promotional tool with images of West Clare and IRRUS being sent out from the site. A guest page was also incorporated into the site with an invitation to comment. There were several complimentary emails to the guest page from local tourism providers in West Clare.

The web site received a review by the Doras Directory of Irish websites on April 3, 2001 in which it received a rating of 4 shamrocks.

The brand image, web site and promotional literature were evaluated by an independent focus group on April 9, 2001. The group consisted of a marine biologist, the Tourism Development Manager of Shannon Development, a consultant in heritage interpretation, a domestic tourist and an outdoor adventure tour operator. The recommendations of the focus group were implemented in the final drafting of the map and guide booklet and in updates to the website.

The website acts as a portal site with links to each of the brand members. The IRRUS marketing group intend to monitor the number of hits brand member websites receive through the IRRUS site.

3.5.2. Plans for the provision of an ecotourism package in West Clare

The IRRUS marketing group are currently developing a long term marketing strategy in conjunction with Shannon Development Ltd. Discussions are also underway to explore the possibilities of offering short-break package deals in West Clare. This would include provision of transport from Shannon Airport to West Clare and an inclusively priced activities package over a three to four day period. The META-project manager discussed this type of package offer with the group in November 2000. However, at this early stage, the confidence of the cluster (IRRUS) group had not yet developed. Now that the group are set up as an independent marketing group and have worked through the various projects already mentioned, a certain level of empowerment has occurred and the group feels confident to tackle such a project over the coming winter months (2001-2002)

3.5.3. Summary of Objective 4 Outcomes

The timescale of the META- project has allowed for a small degree of test marketing to take place. The level achieved to date however is too low to provide any conclusive results on the success of the marketing strategy undertaken. A longer timeframe is necessary to develop a 'package of ecotourism products' and to test market this product through the promotional materials developed to date.

SECTION FOUR
CONCLUSIONS AND RECOMMENDATIONS

4.1. Conclusions

Ecotourism is based on enabling people to experience the natural environment in a manner that is consistent with the principles of sustainable development. Marine ecotourism denotes ecotourism activities that take place in the coastal zone, in the marine environment, or in both. Marine ecotourism is nature based, educational, operates with small groups, minimises its impacts on the natural and socio-cultural environment, supports the protection of natural areas through the generation of economic benefits for host communities and increases awareness of conservation issues among both operators and tourists. West Clare, situated on the Atlantic coast of Ireland was selected as the study area for the EU funded META- project. Declining employment in the traditional sectors of fishing, farming and tourism, rural depopulation, an ageing population profile and a variety of rich, unspoilt, under-utilised natural marine resources provided the ideal backdrop for the development of marine ecotourism.

Through the EU META- project a transnational model for marine ecotourism planning in the EU Atlantic Area has been developed. This model incorporates the following six principles of 'genuinely sustainable marine ecotourism':

- local participation
- environmental protection as a priority
- balance of statutory and voluntary approaches
- education and interpretation
- collaborative approach and
- responsible marketing

These are the principles upon which the META- project was implemented in West Clare. (META- 2001)

The principles of local participation and collaboration of statutory and voluntary approaches were vital components of the methodology employed in the West Clare META- project. This involved local tourism stakeholders working alongside statutory development and marketing agencies. Bottom-up planning was facilitated to meet top-down and vice versa through the project, thus providing a balance of statutory and voluntary approaches. Involvement by all parties throughout the project exhibited a commitment to developing the region for marine ecotourism using a collaborative approach. Conservation of the natural resource was already an important concern for local tourism providers in the area prior to the META- project, as is evidenced by the existing voluntary codes of conduct in operation in the dolphin watching industry on the Shannon Estuary. This commitment to conservation has been strengthened through the willingness of members of the IRRUS group to support codes of conduct and to operate under agreed brand criteria. Education and interpretation for both the tourism provider and the tourist were prime concerns in the development of the IRRUS marketing materials.

There were four objectives involved in the West Clare META- project and the table below summarises the project findings when these objectives were implemented.

Table 4.1: Summary of findings of West Clare META-project

	Objective 1: To assess tourist motivation for ecotourism
1	There is almost no awareness of West Clare as a distinct tourism region
2	There is a low awareness of West Clare's marine ecotourism activities
3	Tourists show a preference for a mixed package of marine ecotourism activities with general tourism activities
4	Tourist show a preference for marine ecotourism activities that • are provided in small groups • are locally based and employ locally • provide informative and high quality interpretation on the natural resources and local conservation issues • contribute to local conservation • develop and implement local codes of conduct for both the tourist and the tourism provider.
	Objective 2: To assess the feasibility of marketing a 'package' of ecotourism activities
1	The development of a promotional 'package' of activities was found to be feasible in the given timescale due to the resources provided through the META- project. A website, a map and guide booklet, posters and flyers were all produced to promote West Clare's marine ecotourism products under the brand name of IRRUS. However, a longer timescale than that allowed within the META- project is needed to fully assess the marketing and promotional effect of this packaging on the individual businesses involved in the promotion.
	Objective 3: To assess the implications of a 'branded ecotourism area' for the sustainable development of marine ecotourism
1	A brand name (IRRUS) and logo were developed for the promotion of marine ecotourism in West Clare through the META- project. The limiting time factor of the programme, however, did not allow for a comprehensive assessment of the implications of the development of such a brand in terms of sustainable tourism development. The brand needs to be monitored over a longer period to determine the implications it may have in terms of responsible marketing of the region for marine ecotourism.
2.	In the interests of sustainable tourism development and as a quality assurance measure, an independent monitoring and assessment protocol should be established for the IRRUS brand.
3	Feedback from the wider tourism community of West Clare, through breakout sessions in an organised seminar, identified the need to determine how the IRRUS brand will be applied in terms of the overall marketing and promotion of West Clare tourism. Branding a defined geographical region solely as a marine ecotourism destination may not be the most desirable marketing option from the viewpoint of other tourism providers. The preference for a mixed package of activities as indicated by the visitor survey results, supports this viewpoint.

	Objective 4: To assess the feasibility of promoting packaged ecotourism products using innovative marketing tools
1	It was not feasible to develop an organised tour package of the marine ecotourism products and services, provided by IRRUS product group marketing members, within the timescale of the project. Training was provided in the form of marketing and web site development workshops to the marketing group. However further capacity building over a longer time period was required to enable participation in such an organised tour package. The IRRUS group plan to develop such a package in the future.
2	The timescale of the META- project allowed for limited assessment of the developed promotional tools. The website was monitored over a nine-week period and the feedback was highly positive. A focus group was organised to assess the suitability of all the promotional materials and the feedback was very favourable. The IRRUS group aim to further develop and maintain test-marketing procedures, so as to maximise the marketing potential of the promotional effort.

4.2. Recommendations for Future Marketing and Development of West Clare as a Marine Ecotourism Destination

- A key result of the visitor survey was the apparent low level of awareness of West Clare and the marine ecotourism activities available in the area. The development of the IRRUS brand, its associated promotional material and ultimately the IRRUS product marketing group may in the long term contribute to increased awareness of West Clare. However, the degree to which the IRRUS product marketing group will contribute to this effect depends on the extent to which they undertake a targeted promotion and marketing campaign. A well-planned promotional campaign, undertaken in collaboration with the Regional Tourism Agency, should be a key priority of the IRRUS Group.

- Through engaging in the West Clare META- project linkages have been created between the local stakeholders and regional planning and marketing agencies. These linkages should be maintained and strengthened. A collaborative approach towards planning, development and management of marine ecotourism at local and regional level is necessary as each stakeholder/agency has certain resources but no individual group has the resources to tackle all the issues that may be encountered.

- If the branding is to succeed, the IRRUS marketing group must commit their own resources (both financial and human) into on-going market research so as to fine tune the promotional tools being utilised and to maximise their marketing promotional opportunities. The effectiveness of the IRRUS promotional materials in marketing West Clare marine ecotourism should be monitored and evaluated over a longer time period.

- A package of marine ecotourism activities incorporating general tourism activities should be developed and test marketed. Opportunities for the provision of packages and integrated circuits with nearby areas such as North Clare and other marine ecotourism destinations at a national and international level should be explored.

- The principles incorporated in the IRRUS Brand must be delivered i.e. a genuine marine ecotourism product. This can only be achieved through adherence by members to the IRRUS ecotourism brand criteria and to the principles of genuinely sustainable marine ecotourism as developed through the EU META-project.

- It is imperative that an independent monitoring and assessment system should be established to ensure that the product on offer is indeed genuine marine ecotourism. Membership of the IRRUS group should not be expanded until this system is operating successfully

- Linkages should be developed with other ecotourism destinations on a national and international level. The potential to develop the IRRUS brand as a recognised European Eco-label should be explored. Tourism ecolabels are subject to European Union rules and standards for the ISO 4000 series. (META- 2001).

- It must be determined how the IRRUS brand is to integrate with the (wider) West Clare tourism brand.

- West Clare's marine ecotourism products should be examined in the context of community based resource management i.e. interaction/integration with existing economic activities such as aquaculture, fishing and farming and issues such as the development of intersectoral collaboration structures should be explored. Capacity building structures should be put in place to enable wider community participation in the development of the natural resources of West Clare

It is recommended that any group wishing to pursue the development of marine ecotourism should consult the two publications of the EU META- project.

(1) *'Planning for Marine Ecotourism in the EU Atlantic Area – Good Practice Guidance'* (META- 2001). This document consists of a range of advice and practical tools through which the principles for genuinely sustainable marine ecotourism can be implemented.

(2) *'Genuinely Sustainable Marine Ecotourism in the European Union Atlantic Area: A Blueprint for Responsible Marketing'* (META- 2001) elaborates on marketing advice, including case study material based on the West Clare META- project.

Both documents can be downloaded from: www.tourism-research.org

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Marine Institute
Foras na Mara

SURVEY OF VISITORS TO WEST CLARE, 2000

Introduction: Good morning/afternoon. My name is……..I'm conducting a survey of visitors to West Clare on behalf of the Marine Institute. We assure you of absolute confidentiality in the information which you provide.

_____

Are you a visitor to the West Clare Area?

Yes ☐1……..continue
No ☐2 ……..discontinue

Have you been interviewed on this survey before?

Yes ☐1……..discontinue
No ☐2…….continue

Q1. What are the first words that come to mind when you think of West Clare?

_____

_____

Q2. Do you associate West Clare with any of the following? Please tick your response where:

☐1 = Yes strongly ☐2 = Yes a little
☐3 = No ☐4 = Don't know

Surfing …	☐1	☐2	☐3	☐4
Walking ……	☐1	☐2	☐3	☐4
Diving …..	☐1	☐2	☐3	☐4
Cliffs.. ……..	☐1	☐2	☐3	☐4
Bird watching …	☐1	☐2	☐3	☐4
Dolphins ……	☐1	☐2	☐3	☐4
Nature watching…..	☐1	☐2	☐3	☐4
Heritage ……..	☐1	☐2	☐3	☐4
Music ……..	☐1	☐2	☐3	☐4
Sailing …….	☐1	☐2	☐3	☐4

Q3. Can you think of anything that you have come across in West Clare that you haven't seen anywhere else before?

_____

_____

Q4. What was your reason for visiting West Clare?

Passing through ☐1
Visiting friends/family ☐2
Holiday ☐3
Day trip to leisure facility ☐4
Please specify facility:
_____6

Other (please specify):
_____7

Q5. What type of accommodation have you used during your stay in West Clare?

B&B ☐1
Hostel ☐2
Hotel ☐3
Farmhouse ☐4
Caravan ☐5
Self-catering house ☐6
Campsite ☐7
Other (please specify):
_____8

Did not stay in West Clare ☐9

Q6. Was this your first visit to West Clare?

Yes ☐1
If Yes go to Q 8.
No ☐2
If No go to Q7.

Q7. How many times had you visited this area before?

Once before ☐1
Twice before ☐2
More than 3 times ☐3

Q8. Where did you hear about tourism facilities in West Clare?

Word-of-mouth ☐1
Tourist Office ☐2
Promotional leaflets ☐3
Newspapers ☐4
Brochure/local Guide book ☐5
Travel/Guide book ☐6
please specify:
_____
Other: (Specify)_____ ☐7

Q8 (a) Where did you pick up the brochures/leaflets/guidebooks?

_____

Q9. Have you undertaken any of the following activities during your stay in West Clare?
SHOW CARD and Code:

Swimming in sea	☐1	Visit to the beach	☐2
Swimming indoors	☐3	Boat trip	☐4
Bird watching	☐5	Scuba diving	☐6
Coastal walk	☐7	Sea angling	☐8
Dolphin watching	☐9	Jet Skiing	☐10
Island visiting	☐11	Canoeing	☐12
Sailing	☐13	Surfing	☐14
Snorkelling	☐15	Cycling	☐16
Pleasure Boating	☐17	Fishing	☐18
Sea-kayaking	☐19	Visit to aquarium	☐20
Walking	☐21	Guided walk/tour	☐22
Visit to interpretative/heritage centre			☐23
None of these	☐24		

Q10. Which of these marine based activities would you like to take part in while on holidays? SHOW CARD and code:

Bird watching ☐1 Scuba Diving ☐2
Snorkelling ☐3 Guided coastal tour ☐4
Guided nature walk ☐5 Wildlife cruises ☐6
Walking (>2miles) ☐7 Island visiting ☐8
Cycling ☐9 Visit to aquarium ☐10
Dolphin /WhaleWatching……☐11
Visit interpretative centre……☐12
Seal watching……..☐13
Any other marine-based activity ….. ☐14

None of these ……. ☐15 ….go to Q.14

*If selected more than one activity ask Q.11 (others go to Q.12)

Q11. Please list your top three favourites of the activities you mentioned?
First:_____1

Second:_____2

Third:_____3

Q12. If you were to take part in any of the activities you mentioned how important, if at all, would the following factors be to your enjoyment? (SHOW CARD- SCALE) Please indicate the response that best represents your opinion.

READ OUT

Being free to go where you like and do what you like

0 1 2 3 4 5 6 7 8 9

taking good photos of plants, animals, birds

0 1 2 3 4 5 6 7 8 9

Being provided with information on the wildlife you might see (e.g. their behaviour, lifecycle, etc.)

0 1 2 3 4 5 6 7 8 9

Being in beautiful scenery/seascapes

0 1 2 3 4 5 6 7 8 9

Being with a small group of people (less than seven people)

0 1 2 3 4 5 6 7 8 9

Having a knowledgeable guide

0 1 2 3 4 5 6 7 8 9

Watching wildlife without disturbing their natural) behaviour (e.g. feeding, hunting, etc.

0 1 2 3 4 5 6 7 8 9

Being with your friends and family

0 1 2 3 4 5 6 7 8 9

Having an entertaining guide

0 1 2 3 4 5 6 7 8 9

Be provided with information about the natural environment you visit

0 1 2 3 4 5 6 7 8 9

Getting close to animals, plants, birds

0 1 2 3 4 5 6 7 8 9

Being provided with information on what you can do to reduce your impact on the wildlife and its environment

0 1 2 3 4 5 6 7 8 9

Q13. If you chose to take part in (*state chosen activity/ies mentioned*) that was provided for you by a tour company or other organisations – how important (if at all) would the following factors be to you? Please indicate the response that best represents your opinion. SHOW CARD –SCALE
(Interviewer circle number selected by respondent)

READ OUT

the company/organisation is owned/run by a local person

0 1 2 3 4 5 6 7 8 9

The company provides information about the wildlife

0 1 2 3 4 5 6 7 8 9

Some of the money you pay goes towards wildlife conservation

0 1 2 3 4 5 6 7 8 9

The company provides opportunities for you to get close to animals, plants, birds

0 1 2 3 4 5 6 7 8 9

The company employs local people

0 1 2 3 4 5 6 7 8 9

The company abides by any codes of conduct and regulations to reduce your impact on the wildlife and its environment

0 1 2 3 4 5 6 7 8 9

The company uses renewable energy

0 1 2 3 4 5 6 7 8 9

The company recycles paper

0 1 2 3 4 5 6 7 8 9

Q14. Which of these places did you visit while in the area? SHOW CARD and Code

Kilkee Waterworld	☐1
Shannon Seafari Dolphin Boat , Kilrush	☐2
Dolphinwatch, Garrigaholt	☐3
Saoirse SeaSports	☐4
Scattery Island Centre Kilrush	☐5
Scattery Island Ferry	☐6
Kilrush Heritage Centre	☐7
Vandeleur Garden, Kilrush	☐8
Kilrush Creek Activity Centre	☐9
Kilkee Dive Centre	☐10
Nature Quest Centre, Kilkee	☐11
Thalassotherapy Centre Kilkee	☐12
None of these	☐13

Q15. Do you belong to any organisations that are involved with conservation of wildlife or the natural environment?

Yes ☐1 No ☐2

If yes, please specify:

_____

Q 16. What does the word "Ecotourism" mean to you?

_____

_____

Q17. READ:

Some people suggest that Ecotourism is the kind of tourism that is based on the enjoyment and interpretation of the natural environment and its wildlife and is managed to be environmentally sustainable.

If this is the case, do you think of West Clare as an ecotourism destination?

Yes ☐1 No ☐2 DK ☐3

Q18. Which of these statements reflects your view of ecotourism as part of your holiday? SHOW CARD and Code *

I would choose a holiday mainly for the ecotourism experience…….☐1

I would choose a holiday which has some ecotourism experience …….. ☐2

I would not be interested in an ecotourism experience …… ☐3

Don't Know……. ☐4

Q 19. The following statements have been made about ecotourism, please say whether you agree/disagree with these statements:

SHOW CARD:

Agree strongly…..1 Disagree…..4

Agree……2 Disagree Strongly…5

Neither agree/disagree….3 Don't Know…6

READ OUT

Ecotourism interferes with people enjoying themselves

☐1 .. ☐2 .. ☐3.. ☐4.. ☐5 …☐6

Ecotourism improves people's experience about the visited area

☐1 .. ☐2 .. ☐3.. ☐4.. ☐5 …☐6

Ecotourism increases understanding and respect for the marine environment

☐1 .. ☐2 .. ☐3.. ☐4.. ☐5 …☐6

Tourists who engage in Ecotourism activities are more likely to adopt behaviour that promotes conservation and protection of the environment.

☐1 .. ☐2 .. ☐3.. ☐4.. ☐5 …☐6

This next section deals with your visit to West Clare and the transport you used to get here:

Q20. How long are you actually in West Clare?
Half a day or less (Hours……..) (**go to q.20a**) ☐1
Most of the day (hours……..) (**go to q20a**) ☐2
Number of nights (……) (**go to q21**) ☐3
One month or more …… (go to q22**)** ☐**4**

Q21. Are you staying in West Clare for the whole duration of your holiday?
Yes ☐1 (**go to q.24)**
No ☐2 (**if no, go to q21a**)

Q21b. Where were you staying overnight
before coming to West Clare?
At home ☐1**(go to q.24**)
Other (specify):_____ ☐2 (**go to q.23)**

Q20a. Are you staying overnight away from home?

Yes ☐1
No ☐2 (if no, go to q24)

Q21a. Where else are you staying overnight?
Write in:_____ ☐1
Touring around the region…… …☐2

Q.22. How long is your holiday in Ireland
Number of nights…… ☐**1**
One month or more ☐2
Specify……..

Q.23. What form of transport did you use for the major part of your journey to West Clare from your earlier overnight stop elsewhere? SHOW CARD

Private automobile ☐**1……How many people in car in total? 1, 2, 3, 4, 5+**
Rental automobile ☐**2…… How many people in car in total? 1, 2, 3, 4, 5+**
Taxi ☐**2…… How many people in car in total? 1, 2, 3, 4, 5+**
Motor cycle ☐**2 ……Alone/two**
Bus/motor coach ☐**2 ……How full was it? Approx. ¼, ½, ¾, full**
Train ☐**2 ……How full was it? Approx. ¼, ½, ¾, full**
Scheduled Airline ☐**2 ……How full was it? Approx. ¼, ½, ¾, full**
Chartered Airline ☐**2 ……How full was it? Approx. ¼, ½, ¾, full**
Private aeroplane ☐**2 ……How many passengers in total? 1, 2, 3, 4, 5-10+**
Boat-ferry ☐**2 ……How full was it? Approx. ¼, ½, ¾, full**
Boat-cruise ship ☐**2 ……How full was it? Approx. ¼, ½, ¾, full**
Boat-private motor ☐**2 ……How full was it? Approx. ¼, ½, ¾, full**
Boat-sailing ☐**2 ……How full was it? Approx. ¼, ½, ¾, full**
Cycle ☐**2**

Q.23a. How long did this journey to West Clare take (total travelling time)
Write in to nearest half hour……☐**1**

Q24. (ask all) What form of transport did you use for the major part of your journey from your home? SHOW CARD
Code and write in how full the means of transport was.

Private automobile ☐**1……How many people in car in total? 1, 2, 3, 4, 5+**
Rental automobile ☐**2…… How many people in car in total? 1, 2, 3, 4, 5+**
Taxi ☐**2…… How many people in car in total? 1, 2, 3, 4, 5+**
Motor cycle ☐**2 ……Alone/two**
Bus/motor coach ☐**2 ……How full was it? Approx. ¼, ½, ¾, full**
Train ☐**2 ……How full was it? Approx. ¼, ½, ¾, full**
Scheduled Airline ☐**2 ……How full was it? Approx. ¼, ½, ¾, full**
Chartered Airline ☐**2 ……How full was it? Approx. ¼, ½, ¾, full**
Private aeroplane ☐**2 ……How many passengers in total? 1, 2, 3, 4, 5-10+**
Boat-ferry ☐**2 ……How full was it? Approx. ¼, ½, ¾, full**
Boat-cruise ship ☐**2 ……How full was it? Approx. ¼, ½, ¾, full**
Boat-private motor ☐**2 ……How full was it? Approx. ¼, ½, ¾, full**
Boat-sailing ☐**2 ……How full was it? Approx. ¼, ½, ¾, full**
Cycle ☐**2**

Q25. How long did your journey from home take?
(total travelling time one way): Write in to the nearest half hour:**……**

Q26. What is your (nearest) home town/city and country?

Write in: Home Town/City:_____Country:_____

Area Code: _____

In this Section I would like to ask information for classification of the survey, this information will be treated as entirely confidential.

Q27. Respondent:

Male ☐1 Female ☐2

Q28. Which Age Group are you in (SHOW CARD)

16 – 19 ☐1 20 – 29 ☐2
30 - 39 ☐3 40 – 49 ☐4
50 - 59 ☐5 60 – 69 ☐6 70+ ☐7

Q29. What is your occupation?

_____

_____

Q30. Which of the following best describes your employment status? SHOW CARD

Full time paid work (30h+) ☐1
Part time paid work ☐2
Fulltime home/child care ☐3
Full time education ☐4
Retired ☐5
Unemployed ☐6
Other (please specify) ☐7

_____

Q31. What was the last level you completed in your formal education? SHOW CARD

Primary school ☐1
Secondary school to age 16 ☐2
Secondary school to age 17/18 ☐2
Third level graduate ☐3
Postgraduate ☐4

Q32. What is your household income? SHOW CARD (please state Irish Punts/Sterling/or other currency)

Between 0- 10,000 ☐A
10,000 - 20,000 ☐B
20,000 - 30,000 ☐C
30,000 - 40,000 ☐D
40,000 - 60,000 ☐E
60,000 plus ☐F

Interviewer's Name:_____

Interviewer's Signature:_____

Place of interview_____

DATE:_____

WEATHER:_____

APPENDIX II: IRRUS Brand Criteria

IRRUS Mission statement:
'IRRUS brand members are committed to the sustainable development of West Clare tourism through caring for their environment, contributing to conservation and enhancing visitor enjoyment through interpretation'

It is important that a set of ecotourism criteria under which members must operate to be allowed to use the IRRUS brand is agreed. These commitments are not compulsory for inclusion under IRRUS but are aspirations that group members should strive to address. The strength and profile of the brand will be determined by the lowest denominator therefore it is in the interests of all group members to ensure the minimum acceptable standards are high if IRRUS is to be a powerful marketing tool.

Generic commitments:

- encourage respect and care of the environment,
- minimise environmental impacts of both the visitor and the provider,
- commitment to sustainable use of natural resources,
- contribute to local conservation
- contribute to a local sustainable economy through employment, supporting local services and products whenever possible,
- provide interpretation to the visitor on local environment and conservation issues
- adopt best practices and codes of conduct,
- attend information seminars on aspects of ecotourism and environmental management for both management and staff
- assist in the monitoring of the impacts of ecotourism development in West Clare

Specific commitments:
The following are a guide to the type of commitments to which IRRUS brand members should aspire. They are included as a check list against which group members can monitor their own progress.

Accommodation

- employ locally whenever possible
- adopt environmentally friendly waste management (reduce – recycle – reuse/ water use)
- use local produce (food and crafts)
- provide interpretative/educational materials about the local area for guests
- provide information on public transport and services for guests
- provide Bord Failte standard registered accommodation
- use energy saving devices (lightbulbs, insulation)

Nature-watching

- adopt and promote code of conduct (for example; dolphin watching tour operators must be accreditated under Saoirse na Sionna)
- provide interpretation on local environment and local conservation issues for users
- prepare users to minimise their impacts on the environment
- advise users against collecting souvenirs from natural areas
- avoid sensitive breeding and roosting sites
- contribute to biological recording schemes,

- operate small groups, within carrying capacity of environment
- assist with monitoring indices and programmes to assess long term impact and address with action when necessary
- employ locally whenever possible
- adopt environmentally friendly waste management (reduce – recycle – reuse/ water use)
- use local produce (food and crafts)
- provide information on public transport and services for users
- provide Bord Failte standard registered accommodation (if in accommodation sector)
- use energy saving devices (lightbulbs, insulation)

Thalassotherapy

- ensure sustainable use of seaweed resources
- adopt environmentally friendly waste management (reduce – recycle – reuse/ water use)
- use local produce (food and crafts)
- provide interpretative/educational materials about the local area for guests
- provide information on public transport and services for guests
- provide Bord Failte standard registered accommodation
- use energy saving devices (lightbulbs, insulation)

Diving

- code of practice including no-take regulations in Ireland
- information on marine species etc, underwater nature trail
- provide interpretation on local environment and local conservation issues for users
- assist with monitoring indices and programmes to assess long term impact and address with action when necessary
- employ locally whenever possible
- provide information on public transport and services for users

Angling

- adopt tag and release scheme for elasmobranchs
- respect minimum landing size limit for listed fish species
- provide interpretation on local environment and local conservation issues for users
- assist with monitoring indices and programmes to assess long term impact and address with action when necessary
- employ locally whenever possible
- provide information on public transport and services for users

Walking

- consultation with local landowners on access
- operates small groups, within carrying capacity of environment
- provide interpretation on local environment and local conservation issues for users
- assist with monitoring indices and programmes to assess long term impact and address with action when necessary
- employ locally whenever possible
- provide information on public transport and services for users.