



Comhairle Contae
Dhún na nGall
Donegal County Council



Caravan Camping & Camper Van Study

Donegal County Council



December 2021



DONEGAL

IRELAND'S DNA



Sample Client Name
Sample Report Name
KPMG Future Analytics
June 2021

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1 Introduction

As the Donegal Tourism Strategy 2017-2020¹ notes, Donegal is a County steeped with a rich and diverse tourism offering. It has a reputation for delivering world-class tourism services and attracting visitors from all over the island of Ireland but also from many overseas destinations including the UK, USA, and mainland Europe in particular. Indeed, over the past number of years Donegal has been recognised as a leading destination for visitors with the following accolades being bestowed on the county and its attractions:

- ‘Coolest Place on the Planet’ by National Geographic Traveller in 2017
- ‘Ireland’s Hidden Gem’ by readers of the Irish Independent Travel Magazine in 2017
- Donegal Airport voted ‘Most Scenic Airport’ by PrivateFly in 2018 and 2019
- Donegal Town named as ‘Ireland’s Best Foodie Town’ by the Foodie Destination Awards in 2019

Donegal is part of the ‘Border Region’ as defined by Fáilte Ireland (to identify visitor numbers and the economic value of tourism in that region - which also includes Cavan, Leitrim, Monaghan, and Sligo). 768,000 overseas visitors, 597,000 visitors from Northern Ireland and a further 1.18 million domestic visitors were recorded as having visited the region in 2019². The county is also located along the Wild Atlantic Way (WAW) destination experience, one of Ireland’s most popular tourism offerings. In 2019, 3.4 million overseas tourists visited the WAW generating €1.9bn in revenue. A further 5 million domestic tourists visited the popular coastal route, generating €1.1bn Revenue, bringing the economic value of the WAW to €3bn. Donegal hosts 37 Discovery Points and 3 Key Signature Discovery Points on the WAW including Sliabh Liag, Malin Head and Fanad Head.

The 2017-2020 Tourism Strategy for the County stated that “*Donegal is forecast to continue to increase its share of the overall tourism sector in Ireland as a follow on to the substantial growth over the last number of years. Donegal is well positioned to benefit from this increasing growth in tourism and there is an opportunity for Donegal to work collaboratively both within the County and with our neighbouring areas in Northern Ireland, to compete for a greater share in the market*”.

However, despite these positive developments and aspirations, 2020 and 2021 have been difficult years for the tourism industry in Donegal and indeed across Ireland and the world (see Section 2). The coronavirus (COVID-19) pandemic represents an unprecedented challenge – and one for which the longer-term impacts remain uncertain. However, this period has also seen the rise of the ‘staycation’ trend (i.e. travelling domestically), a trend which the OECD states will continue to be a key driver of recovery in the short to medium term. An associated development has been a rise in camping and campervan-based holidays across much of Europe, including Ireland. Indeed, Forbes,

¹ <https://www.donegalcoco.ie/media/donegalcountyc/tourism/documents/Donegal%20Strategy%20EN-compressed.pdf>

² [Tourism Facts 2019 Final March 2021 \(failteireland.ie\)](https://www.failteireland.ie/tourism-facts-2019)

reflecting on these trends, has referred to camping as “perhaps the ultimate form of socially distant travel and recreation”³.

Donegal County Council is committed to the continuous development of a diverse, exciting and high-quality tourism product and offering – one which supports the county’s recovery in 2021 and beyond. In doing so, the Council have commissioned KPMG Future Analytics to undertake an assessment of the current state of the tourism sub-sector comprising Caravan, Camper Van and Camping (CCC) in County Donegal including the development of evidence-based recommendations for the future development of this important strand of the county’s tourism infrastructure.

Data from Fáilte Ireland shows that of all registered overseas visitors along the Wild Atlantic Way, 8% stayed in Caravan and Camping accommodation in 2019 (a further 35% stayed in hotels while 24% in Guesthouses stayed in guesthouses, for example). No similar data on those staying in Caravan and Camping accommodation was available for domestic visitors. However, following the onset of the COVID crisis, the Irish Times cited camping as the number one ‘travel trend to watch in 2021’⁴ Moreover, data from the National Vehicle and Driver File, a database of all 2.5 million vehicles in the country, shows the number of campervans in Ireland rose from about 11,200 in 2018 to almost 12,600 in April 2020 and had reached 13,700 by October of that year (a 22% overall increase over that period).

The CCC sector has to a large extent developed in an organic fashion in Donegal with the majority of service providers being private sector, with a small number of local Aire de Service locations provided by Donegal County Council. This study will provide a **detailed review of the sector** as it currently exists within County Donegal providing an **assessment of the opportunities and threats** currently presenting for the sector as well as an assessment of **good practices** elsewhere that could be implemented within existing legislative requirements. This study will help inform how best the sector can be supported so that it can be developed as a valuable offering for visitors to Donegal while also meeting the needs of communities.

The report is structured as follows:

- Section 2.0 provides an overview of the caravan and camping sector, and its evolution from national and international perspectives. This includes the implications of Covid-19 on the tourism industry, and the evolving opportunities for the caravan and campervan tourism sub-sector, arising from a heightened demand to connect with nature, and the popularity of the Wild Atlantic Way.
- Section 3.0 outlines the project teams’ approach to the assessment of the current situation of the sub-sector, with an overview of the execution of research and consultations for the study.

³ <https://www.forbes.com/sites/robreed/2020/12/01/the-camping-boom-of-2020-takes-many-forms-but-theres-nothing-quite-like-going-off-the-grid/?sh=4f8d30e8716a>

⁴ <https://www.irishtimes.com/life-and-style/travel/travel-trends-for-2021-what-you-can-expect-from-your-holidays-this-year-1.4437263>

- Section 4.0 presents an in-depth review of the current situation and findings emerging from research, including holiday park/campsite capacities and occupancy levels (used in part to determine the economic value of the sector), and the opportunities and threats which the sector is facing. Additionally, national and international best practice findings are presented in a thematic structure. The emerging themes from best practice research are: Plan and Pre-book, Supply, Inform, Educate & Regulate, and the Digital Enabler. Finally, an overview of the wider policy context is presented with a view to providing key insights into how future planning policies may be shaped and further enhanced.
- Section 5.0 provides evidence from consultations with key organisations, individuals, holiday park/campsite operators and motorhome and campervan users.
- Section 6.0 puts forward the estimated value of campervan and camping to the economy of County Donegal based on the total number of units and average fees per campsite.
- Section 7.0 concludes with a suite of recommendations for developing and supporting the sector.
- Section 8.0 suggests a pathway for the implementation of recommended developments and actions.

2 An Evolving Caravan & Camping Sector: Understanding the International and National Outlook

2.1 The Impact of the Covid-19 Crisis

Tourism is one of Ireland's most important economic sectors and a critical component of the state's employment base. After a period of decline coinciding with the 2007/8 global economic crisis, the sector had witnessed annual growth from 2010 onwards. The Department of Transport, Tourism and Sport reports that the sector supports approximately 325,000 jobs on the island of Ireland, with many more part-time seasonal work within the industry. The CSO reports that in 2019, a total of 10.8 million overseas trips were made to Ireland compared to 10.6 million trips in 2018 (+1.8%). Moreover, expenditure by tourists visiting Ireland (excluding receipts paid to Irish carriers by foreign visitors) was estimated to be worth €5.6 billion in 2019. Combining spending by international tourists with the money spent by Irish residents taking trips here and receipts paid to Irish carriers by foreign visitors, total tourism expenditure in 2019 was estimated to be €9.5 billion.

As 2020 commenced, there was an increase of 4.1% in trips to Ireland by overseas residents in February, compared to 12 months earlier. In addition, trips by residents of Great Britain increased by 9.3% to 282,100 while trips by residents of other European Countries increased by 4.3%. Despite these encouraging early trends, 2020 was an extremely difficult year for the tourism sector. The coronavirus (COVID-19) pandemic has had significant implications for the tourism sector worldwide, as flights were grounded on an unprecedented scale and all unnecessary domestic travel largely halted for large swathes of 2020 and parts of 2021. Across Europe, the European Commission reports that during the high tourism season (April to September 2020), the number of nights spent in EU tourist accommodation registered a drop of 56% compared with the same period in 2019. The fall was higher for international (-74%) than for domestic tourism (-38%)⁵. Stemming from impacts like these, the World Travel & Tourism Council's annual Economic Impact Report says global travel and tourism's contribution to GDP almost halved, falling by €3.8 trillion, or 49%, last year, compared with a decline in the broader economy of 3.7%⁶.

The Covid-19 crisis has not yet abated, and the longer-term impacts of this period are uncertain. However, it is critical that recovery in the sector is strategically managed and planned for. As the Irish 'Tourism Recovery Taskforce'⁷ affirmed in 2020,

"The sector is uniquely positioned to contribute strongly to job creation and reversing unemployment in communities and among the young throughout the country. This recovery provides an opportunity to strengthen the industry and

⁵ <https://ec.europa.eu/eurostat/web/products-eurostat-news/-/ddn-20210401-1>

⁶ <https://www.irishtimes.com/life-and-style/travel/covid-19-wiped-almost-4tn-from-global-travel-and-tourism-in-2020-1.4520023>

⁷ <https://ec.europa.eu/eurostat/web/products-eurostat-news/-/ddn-20210401-1>

reaffirm the importance of the sector as an economic driver and export led industry”.

Indeed, tourism’s contribution is not confined to directly generated employment, economic activity and exports. The sector has an important multiplier effect on other employment sectors such as agriculture, transport, food and beverage and retail, and is particularly important to regional economies.

In the interim, the OECD reports that domestic tourism is providing a much-needed boost to help sustain many tourism destinations and businesses and will continue to be a key driver of recovery in the short to medium term. Specifically, some sub-sectors of tourism sector globally have shown greater levels of resilience over the course of the pandemic and have significant potential to further develop as society recovers and adapts to a ‘new normality’. Although the number of nights spent in EU tourist accommodation registered a drop across all accommodation types between April and September 2020, campsites were the least affected tourist accommodation type. For example, Czechia, Denmark, the Netherlands and Germany observed decreases of less than 5% (although it should be noted that this varies. For example, Greece – the most impacted – registered a decrease of 57%).

However, when looking at the number of nights spent in EU campsites by domestic tourists only, the situation differs. In contrast to the general development, the numbers of nights spent increased in 10 EU Member States (with available data) between April and September 2020 compared with the same period in 2019. Slovenia recorded the highest increase (+76%), followed by Austria (+32%) and Belgium (+25%)⁸. Data for Ireland was not available and thus is not included. However, Con Quill, CEO of the Irish Caravan and Camping Council, said there had been a wave of demand in Ireland since the industry re-opened on June 2, 2021⁹.

In parallel with these trends, and as highlighted in Section 1, data from the National Vehicle and Driver File, a database of all 2.5 million vehicles in Ireland, shows the number of campervans in the country rose from about 11,200 in 2018 to almost 12,600 in April 2020 and had reached 13,700 by October of that year. This is similar to the situation across much of Europe, with the registration of new ‘leisure vehicles’ (i.e. caravans and motorcaravans) rising between September 2020 and March 2021. In Austria, the registration of such vehicles grew by a significant 228% (see Table 1 below)

⁸ <https://ec.europa.eu/eurostat/web/products-eurostat-news/-/ddn-20210401-1>

⁹ <https://www.independent.ie/life/travel/staycations/carry-on-camping-owners-hope-new-found-craze-for-staycations-will-continue-in-future-40641466.html>

Table 1: Registration of new 'leisure vehicles' across Europe: September 2020-March 2021



**EUROPE:
Registrations of new Leisure Vehicles
Season September 2020 - March 2021**

Country	Caravans			Motor Caravans			Leisure Vehicles Total		
	Sept. 2019 - Mar. 2021	Sept. 2020 - Mar. 2021	change %	Sept. 2019 - Mar. 2021	Sept. 2020 - Mar. 2021	change %	Sept. 2019 - Mar. 2021	Sept. 2020 - Mar. 2021	change %
Austria	250	320	+28,0	442	1.956	+342,5	692	2.276	+228,9
Belgium	444	566	+27,5	1.875	3.286	+75,3	2.319	3.852	+66,1
Denmark	1.151	1.411	+22,6	369	852	+130,9	1.520	2.263	+48,9
Finland	305	300	-1,6	734	949	+29,3	1.039	1.249	+20,2
France	3.978	4.856	+22,1	8.472	12.735	+50,3	12.450	17.591	+41,3
Germany	10.897	11.629	+6,7	23.845	39.001	+63,6	34.742	50.630	+45,7
Italy	219	222	+1,4	2.484	3.105	+25,0	2.703	3.327	+23,1
Netherlands	2.861	2.738	-4,3	814	1.056	+29,7	3.675	3.794	+3,2
Norway	681	791	+16,2	969	1.149	+18,6	1.650	1.940	+17,6
Portugal	33 *	33 *	+0,0	95 *	106 *	+11,6	128	139	+8,6
Slovenia	45	37	-17,8	104	123	+18,3	149	160	+7,4
Spain	817	741	-9,3	2.549	3.134	+23,0	3.366	3.875	+15,1
Sweden	1.111	1.392	+25,3	1.273	2.339	+83,7	2.384	3.731	+56,5
Switzerland	602 **	708 **	+17,6	2.367	3.542 **	+49,6	2.969	4.250	+43,1
UK	9.388 */**	8.113 */**	-13,6	6.270	7.109	+13,4	15.658	15.222	-2,8
Others	1.004 *	1.118	+11,4	1.088 *	1.624 *	+49,3	2.092	2.742	+31,1
Total	33.786	34.975	+3,5	53.750	82.066	+52,7	87.536	117.041	+33,7

* Estimates

** figures are provisional, UK: figures must be approved by NCC

Thus, the 'staycation' trend certainly offers opportunities for stimulating some level of recovery in the short to medium term. However, this must of course be strategically planned so that benefits can be maximised while mitigating against any potential negative impacts associated with potential over tourism. Indeed, many counties reported overcrowding and heavy traffic at beauty spots across Ireland over the course of summer 2020. This was a trend observed across much of Europe, with Cumbria Tourism, for example, developing a range of new resources to address to what it deemed to be a 'rapid rise in motorhome ownership over the past 12 months'¹⁰ (See Section 4.5).

2.2 Opportunities for an Evolving Irish Caravan & Camping Sector

In recent years, the outdoor hospitality sector, which includes campgrounds, caravan parks, recreation vehicle parks, and glamping has evolved from a lower-cost tourism niche (typically comprising of basic tenting) to a more mainstream, versatile recreation experience (now also encompassing caravanning, recreation vehicles (RV), and more luxury offerings). In 2011, Fáilte Ireland affirmed that "*the Caravan and Camping product represents an important component of the accommodation mix in Irish tourism,*

¹⁰ <https://www.cumbriatourism.org/handy-new-resources-to-help-new-motorhome-owners-plan-and-book-ahead/>

contributing as it does €120m to the economy¹¹. At that stage, a decade ago, there were 93 registered Caravan and Camping parks in Ireland (with a stock of approximately 5,400 pitches which translated to around 21,600 beds (pitches x 4). However, the report also noted that *“the sector has undergone significant change over the past decade which has resulted in a noticeable decline in the overall number of registered operators with capacity having declined by almost 30% since 2000 (the number of registered parks fell from 132 to 93 and the average size of park declined from 64 to 59 pitches)”*.

The sector was described as *“largely family owned and operated and as such provides an ideal opportunity for interaction with Irish people and culture, which is a commonly cited motivation for visitors”*. Moreover, it asserted that there is clearly a defined market for the caravan and camping product and there is a resurgence of interest in camping and outdoor pursuits generally. In addressing this and in order to support the further development of the sector, a new vision was agreed to harness the commitment of all stakeholders, as follows *“To create a dynamic, diverse and innovative Caravan and Camping product, one which better responds to changing consumer expectations and consistently delivers world class quality, with tangible added-value, for both domestic and overseas visitors.”*

In the period since this 2011 report was published, the challenges and opportunities facing the sector have continued to evolve and develop. The Irish Caravan and Camping Council (ICCC; established in 1960), which represents the sector across the island of Ireland, is today composed of approximately 100 caravan and camping park operators, whose sites are Fáilte Ireland registered. In 2017, the ICCC CEO Con Quill spoke with the Irish Tourism Industry Confederation (ITIC) and reported that the market was worth €132 million to the economy in 2016, with caravan and camping visitors spending 3 million bed nights in the country that year. He remarked that the domestic visitor market was of particularly high importance to the industry (but also closely aligned with school holiday periods).

This domestic market has of course become ever more important in the current climate as the industry continues to grapple with the impact of the COVID-19 crisis. As Section 2.1 has highlighted, the number of campervans in the country have continued to rise and there has been a wave of demand for campsites in Ireland since the industry re-opened in June 2021, according to the Irish Caravan and Camping Council (ICCC). Indeed, Fáilte Ireland have reported that self-catering and caravan parks have ‘fared much better’ than serviced accommodation this summer due to the relatively self-contained nature of both, with 74% of available self-catering and 62% of caravan capacity for August 2021 booked up in contrast to 40% for hotels, 24% for guesthouses and 20% for B&Bs.

Moreover, the launch of the Wild Atlantic Way (WAW) in 2014 has significant ramifications for what is typically deemed to be the ‘drive market’ of the tourism arena; of which campervan / motorhome tourism is a key strand. The drive market represents visitors who use some form of vehicular transport as a mode of transport to reach their destination, where their main purpose of visit is leisure, including day trips and overnight trips to one or multiple destinations. The range of road-based travel encompassed by the

¹¹https://www.failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/3_Research_Insights/1_Sectoral_SurveysReports/Caravan-and-Camping.pdf?ext=.pdf&ext=.pdf

description of drive tourism includes day trips and overnight travel in a family car or a rental car, travel in four-wheel-drive vehicles (4WD), caravanning, travel in recreational vehicles (RVs) and touring by motorcycle. The WAW is Ireland's first long-distance coastal touring route and is one of the longest defined coastal routes in the world. It follows a route from North Donegal to West Cork covering 2,400 km of road and presents significant opportunity to develop and enhance Ireland's ability to access the growing 'drive market'.

However, in July 2016, Anne Lucey reported in the Irish Examiner that while "Increasing large numbers of campervans and motor homes are traversing top tourist route, the Wild Atlantic Way" there are too few "purpose-built facilities to cater for the sector¹²". Moreover, research by Begley (2017¹³), found that many of the carparks along the WAW have had barriers installed to prevent vehicles higher than a car from entering and there are no overnight parking signs displayed.

Given the greater levels of demand for camping holidays (and parallel rise in the number of campervans in the country) over the course of the pandemic – a trend which has also been observed across much of Europe and further afield – there is a growing urgency to strategically plan for the sectors future development. This development should seek to build on the opportunity afforded by the WAW while also ensuring that any potential negative impacts on local communities and environmentally sensitive locations are mitigated against.

¹² <https://www.irishexaminer.com/news/arid-20412766.html>

¹³

<https://research.thea.ie/bitstream/handle/20.500.12065/2613/KatherineBegley.pdf?sequence=1&isAllowed=y>

3 Methodological Approach

As previously highlighted, the overarching objective of this study is **to undertake an assessment of the current state of the tourism sub-sector comprising Caravan, Camper Van and Camping (CCC) in County Donegal including the development of evidence-based recommendations for the future development of this important strand of the county's tourism infrastructure.** This research has encompassed several distinct strands as follows:

- **Baseline / Situation Analysis:** The first stage of the research served to build a baseline understanding of the current context with regards the Camping, Caravan and Campervan sector in County Donegal. Broadly, this has involved establishing baselines for current private and public sector providers of overnight motor-home parking in Donegal; the identification of seasonal levels of capacity and opportunities to increase this where appropriate; an assessment of the impact of 'wild camping'; and the mapping of all caravan, camper van and camping locations; Locations of "wild camping"; Aire De Service locations in Donegal
- **Policy Context Analysis and Review:** To gain a better understanding of the current caravan, campervan and campsite planning frameworks in place at a regional level, a policy context analysis report and review has been produced for several counties along Ireland's West and South Coast. This analysis of the existing policy of both Donegal and of other counties on Ireland's West Coast aim to both inform on the current state of planning policy regarding the caravan, campervan and camping industry along the West Coast and to offer insights into future policy recommendations and guidelines which can be implemented in Donegal.
- **Consultation and Engagement:** This strand of the research involved the following:
 - A series of semi structured interviews with key stakeholders including Donegal County Council; the NPWS; Fáilte Ireland, The Irish Caravan and Camping Council; Total Camping Ireland; Donegal Caravan and Camping Parks Association (DCCPA); Total Motorhome Ireland; several community representatives; and representatives from several international case study examples of good and best practice within the CCC sector.
 - A series of online workshops with Elected Representatives across County Donegal
 - A series of online surveys which received the following response rates:
 - Online Public Survey (1792 responses)
 - Online Service Provider Survey (61 responses)
 - Online Campervan User Survey (1195 responses)
 - Online Public Survey (As Gaeilge): 1 response
 - Online Camper van /motorhome survey (As Gaeilge): 0 responses
- **Economic Value:** The project team, based on information and data sourced during stage 2 and 3, assessed the economic value of the sector to the County, both currently and based upon identified market opportunities.



- **Development of Recommendations:** This stage analysed the findings of the previous stages of the project and developed a number of core thematic recommendations for the future development of this important sector.

4 Baseline Analysis

The first stage of the research served to build a baseline understanding of the current context with regards the Camping, Caravan and Campervan sector in County Donegal. This involved a number of core tasks as follows:

Caravan, Camper Van and Camping Facilities:

- Establishing baselines for current private and public sector providers of overnight motor-home parking in Donegal. This includes detail on locations, capacities, and pricing structures. This will not only inform our understanding of the sector but also enable analysis to be undertaken of the economic impact of this sector on the economy of County Donegal. This was achieved through a combination of desk-based research and direct engagement with service operators.
- Identification of seasonal levels of capacity and opportunities to increase occupancy during both low and high season periods, as appropriate. This is considered in the context of the increased numbers of domestic visitors purchasing or leasing campervans in 2020 and 2021, and in the context of Fáilte Ireland's objective of spreading tourism across the regions and across all seasons. This report will also further examine successful measures undertaken by other destinations in stimulating this sector (see Section 4.5).

Wild Camping

- A review of the impact of “wild camping” on the sector and on the potential risks presenting from this, to the sector, the environment and to the campers themselves. This will draw upon discussions with key stakeholders in the industry and at regional, national level.
- The mapping of wild camping locations, drawing on findings from our research, will enable the project team to identify current and future potential impact on high amenity areas resulting from this.

Mapping

- The project team identified and mapped: Service providers registered with Fáilte Ireland; All caravan, camper van and camping locations; Locations of “wild camping”; Aire De Service locations in Donegal including quantification of their levels of activity and future management options including: Bunrana Aire de Service Point; Carndonagh Aire de Service Point; Falcarragh Aire De Service Point; Maghera Community Centre; Maghera Pier.

4.1 Existing Provision of Pitches for Caravan / Camper Van / Camping

This section is informed by evidence provided from consultations with campsites/holiday parks across Donegal and supplemented through desktop research (including reviews of campsite websites). It is first important to make a distinction between static caravans and touring visitors who utilise campervans, touring caravans and cars or vans to undertake camping trips. Static caravans differ from touring and motor vans as they are designed to be moved in one complete section and don't need to be road legal. Due to their size and weight, they are delivered and moved by transporters, and wheels are solely to manoeuvre on site. In contrast, touring caravans are designed to be towed behind a road vehicle. They must meet the requirements for the construction and use of road vehicles. Campervans or Motor-caravans incorporate the living accommodation similar to that of a touring caravan onto a motor base vehicle and are therefore designed specifically for touring. They also must meet the requirements for the construction and use of road vehicles. For the purposes of this study only those campsites which offered pitches for touring caravans, campervans, and tents, either separately or in addition to static caravans, were directly contacted.

There are 37 campsites which provide for static caravans, with approximately 3,500 static caravans across County Donegal. In addition, five Aire De Service sites are currently in operation across the county (illustrated in Figure 1). However, the exact number of overnight parking spots was available for just three of five Aire De Service sites, counting 22 spaces for overnight parking. There are 20 campsites/holiday parks providing camping and touring van accommodation services and facilities across the county. Research found that there is an estimated total of 394 pitches for touring motorhome/campervan/caravan parking, and 201 pitches for tents, spread across the county. However, it should also be noted that some holiday parks/campsites have indicated the availability of additional large spaces adaptable to tents or touring vans. For this reason, the figures presented in this section should be interpreted as a prudent estimate of the total number of pitches available across the county. Furthermore, of these 20 campsites/holiday parks, five do not accept tents, while another campsite is not accepting tents for the 2021 summer season.

The following sections provide details pertaining to their occupancy levels and measures taken to promote the sector currently. Thereafter, analysis of wild camping across the county is presented followed by a detailed overview of 'good practice' international case studies from which key lessons can be derived for Donegal.

Table 2: Camping and Touring Van Accommodation Providers

Campsites Providing Camping and Touring Van Accommodation	
North of Letterkenny	
1	Foyleside Caravan Park
2	Binion Bay Caravan & Camping Park, Tullagh
Portsalon to Downings	
3	Knockalla Caravan Park, Portsalon
4	Rockhill Holiday Park, Carrowkeel
Downings, Tra na Rossan, Melmore, Dunfanaghy	
5	Rosguill Holiday Park
6	Casey's Caravan & Camping Park, Downings
7	Corcreggan Mill Lodge, Dunfanaghy
8	Wild Atlantic Camp, Creeslough
Dunfanaghy to Donegal	
9	Boyles Caravan Park, Narin/Portnoo
10	Dungloe Touring Caravan Park
11	Sleepy Hollows
12	Tramore Beach Caravan & Camping Park
13	Derrylahan hostel & Campsite
14	Killybegs Holiday Park
15	Spierstown Campervan Parking and Facilities, Donegal
Donegal to Rossnowlagh	
16	Booretree Rossnowlagh Touring and Camping
17	Lough Mardal Lodge
Rossnowlagh to Bundoran	
18	Lakeside Caravan & Camping Park, Ballyshannon
19	Travers Holiday Park
20	Campers Bundoran

The following map pinpoints the location of current service providers in the private and public sectors across County Donegal, differentiating between holiday parks/campsites and Aire De Services. This will inform the identification of gaps, where future market opportunities exist for further development by the sector.

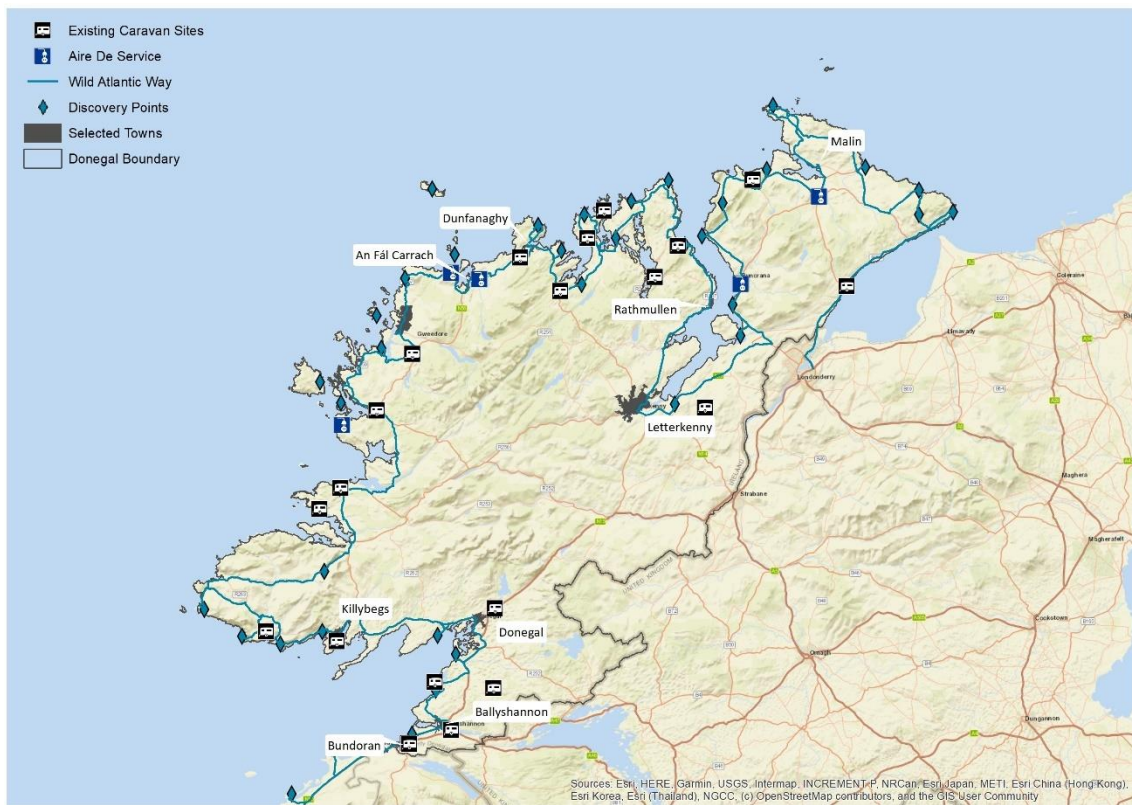


Figure 1: Location of service providers in the private and public sectors

4.2 Seasonal Levels of Capacity

Through our online survey, campsite operators reported their typical occupancy rates for each month of the year. The responses for each month were broken down into an average percentage interval (e.g. For the month of January the Average Occupancy Rate for the county was between 30-39%). From this average percentage interval, we deducted the Median Occupancy Rate percentage. Occupancy rates for campsites peaked at 85% in high season (July and August) and ranged from 65% to 45% in mid-season (September, May, and June). Low season average occupancy rates ranged from 25% in December to 35% in March.

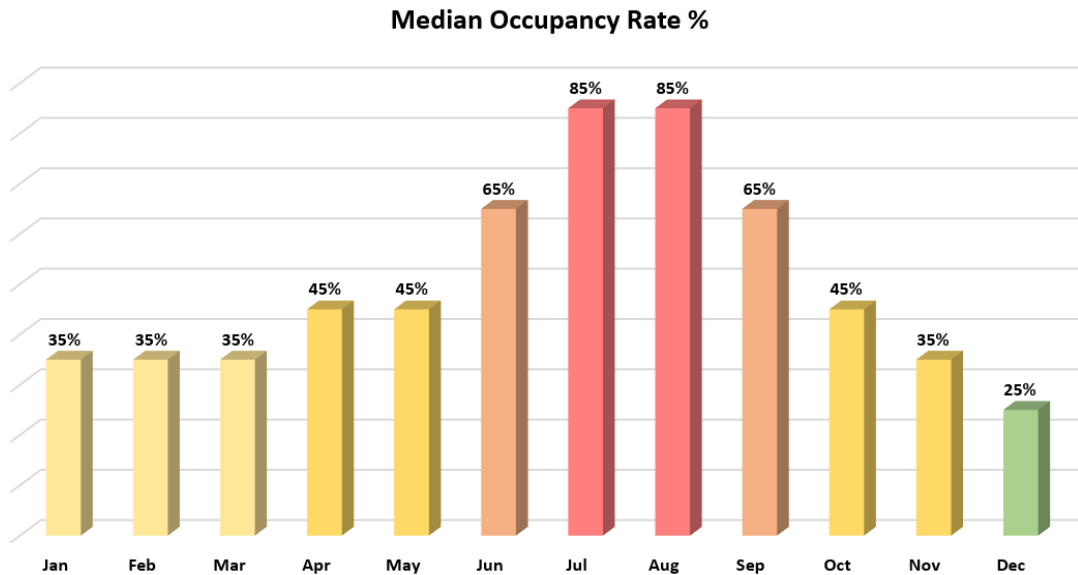


Figure 2: Seasonal occupancy rates

4.3 Measures taken to Promote the Sector

4.3.1 Service Provider Marketing

Donegal is a popular destination amongst overseas and domestic visitors, for its wild and rugged landscapes and naturally beautiful sceneries. Grasping the visitors is a key part of tourism development for Donegal and this is achieved through efficient marketing and targeting the right consumer segment. Through our online survey we asked service operators to identify the platforms they used to market their business. The main platforms

used by service providers are social media platforms i.e. Facebook, Instagram, etc. (21%) and the Go Visit Donegal website (18%).

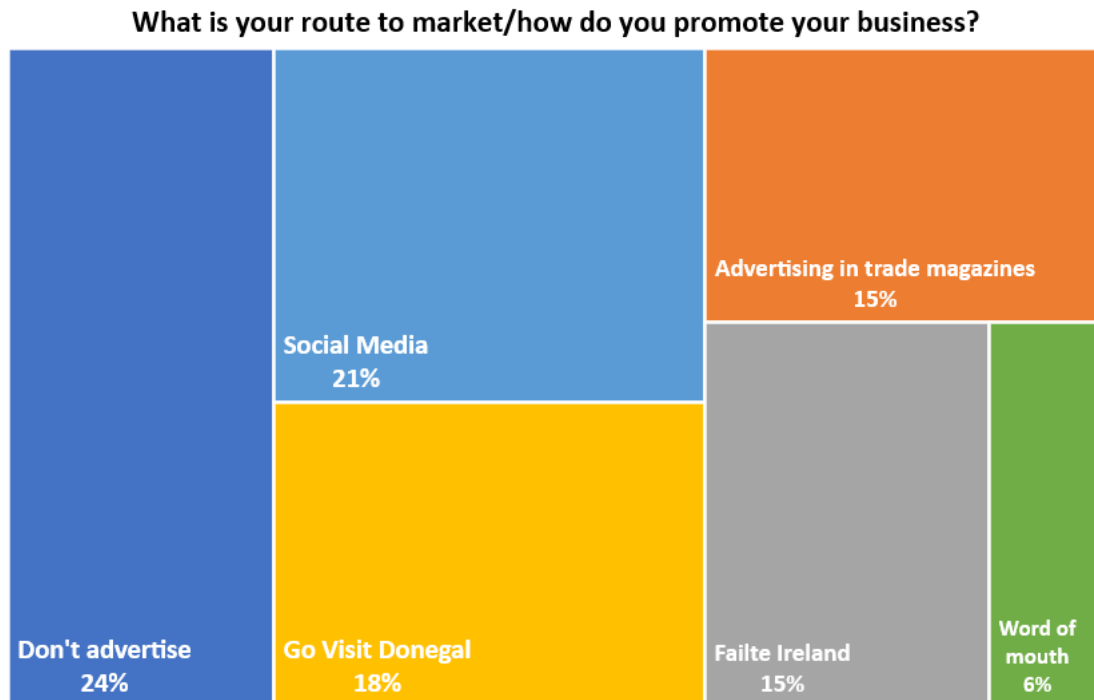


Figure 3: Service provider marketing and promotion

4.3.2 'Unofficial' Marketing

Through online virtual meetings it became apparent that 'unofficial' or non-Council related marketing and promotion of wild camping and motorhome parking was contributing to the arrival of visitors to undesignated areas. It arose that this market segment also relies heavily on inside word of mouth marketing from other visitors within the caravan and camping market, via WhatsApp groups or Facebook Pages. Following example from our consultation with international organisations, the recommendations will include the development of an official platform for designated parking areas and camping spots in Camping parks, Aire De Services and established parking spots. This platform should be easily accessible for those travelling via touring van or with the intentions to camp in the county.

4.4 Wild Camping

Wild camping is the term used when a person stays outside of their usual place of residence to sleep in a tent, a caravan or the modern motorhome in an area that is not designated - and most times not equipped, for such activities. Representatives from organisations such as the National Park & Wildlife Services at Glenveagh National Park have emphasised the difference between the discreet wild camper who wants to

experience the great outdoors to its fullest and leave no trace behind them, and the inexperienced wild camper, who tends not to comply with the standard code of practice when using public spaces and natural resources, either from lack of awareness or lack of sensitivity on respecting the environment and community in which they are camping.

Many campervan users access social media groups (including Facebook) to learn about locations suitable for wild camping. For example, Total Motorhome Ireland have plotted a number of locations across Donegal (reproduced and illustrated below).

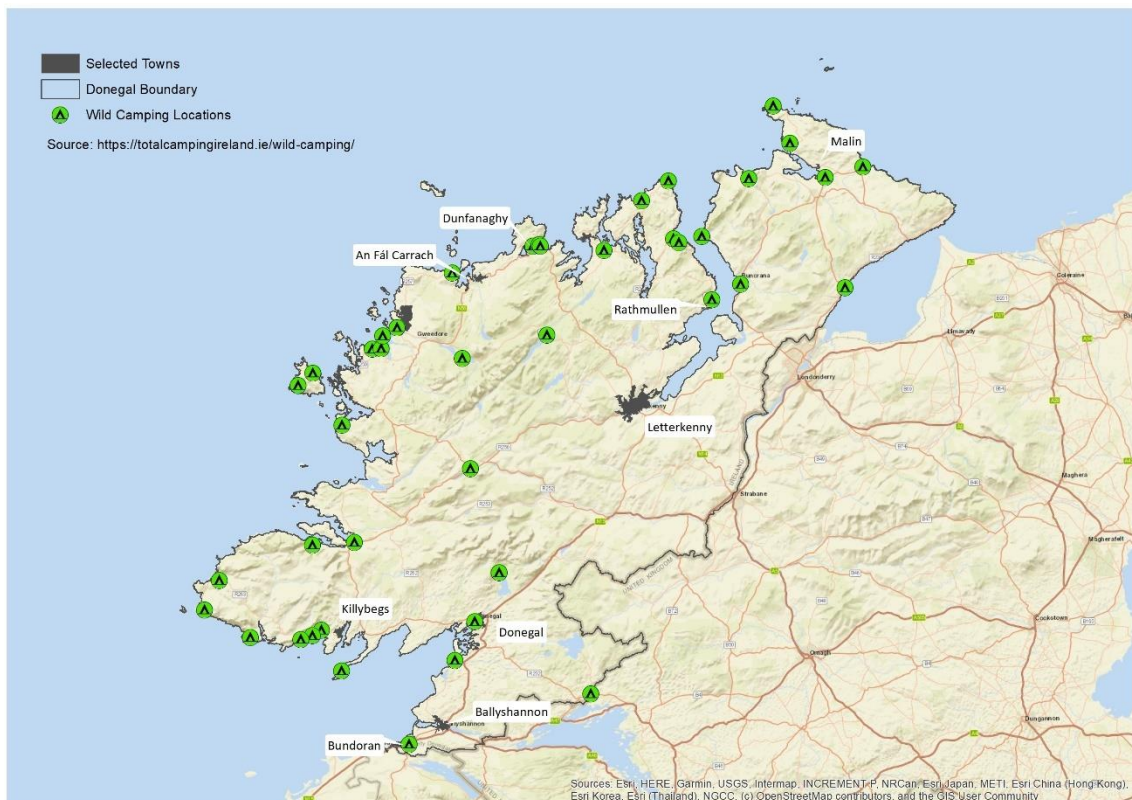


Figure 4: Promoted locations for wild camping

Impacts

The economic, environmental and social impacts of mobile populations, ranging from seasonal second homeowners to short-term stay tourists, on regional communities have long been a contested area of policy-making and research. Wild camping (or 'freedom camping' as it's known in some territories) is one such form of tourism. In avoiding the economic and regulated order of a campsite, wild campers are often associated with camping practices that threaten environmental quality, social order and

public health including litter and excrement on roadsides¹⁴. As a result, the value of such tourists is often debated.

Donegal has a variety of features including the abundance of scenic landscapes and beauty spots which attract camping and motorhome tourists to the region every year. The county is also situated along the Wild Atlantic Way - Ireland's most popular destination brand. This is a popular route for road trips and is typically targeted at mobile tourists such as campervan users. The rise in number of campervans in Ireland and the impact of the growth in domestic tourism and 'staycations' since the onset of COVID-19 have caused the impacts of wild camping to intensify.

The most prominent perceived consequences or impacts of wild camping in Donegal, drawn from extensive consultations, including one-on-one interviews and online surveys (further detailed in Section 5) can be characterised as follows:

Industry Impacts:

There is a perceived increased interest in wild camping across the county – a trend which has been observed across much of Ireland. In particular, wild camping by campervan users has been increasingly observed. Yet, this has also been described as an 'underserved' strand of tourism and an 'emerging market' which must be enabled and accommodated in a sustainable manner. At the same time, the impact of wild camping is described by existing campsite operators as having a negative impact on their businesses. Thus, a key question arising from the consultation exercises is how to adapt to this growing 'market' in a manner which mitigates against potential negative impacts and ensures a positive impact on local economies.

Social Impacts:

Many survey respondents referred to wild campers setting up on private land to which there is often no bylaws or gardai presence to enforce penalties. The frustration from locals towards this type of tourist worsens as roads, car parks, bins and public toilets are overwhelmed by motorhome users or campers parking or setting up in undesignated camper van spots/areas.

Without further management of the sector, much of this local frustration is expected to continue - in return causing local economies to lose out on reaping the full rewards of the camping and camper van industry.

Environmental Impacts:

Wild camping tends to take place in or overlooking natural beauty spots. The banks and dunes in Donegal have reportedly been subject to campfires, impacting local biodiversity. High volumes of camper vans and tents at beaches at/near natural

¹⁴ <https://www.tandfonline.com/doi/abs/10.1080/02508281.2019.1660042?journalCode=rtrr20>

beauty spots are also changing the famous landscapes visitors come to see, according to some consultees.

Economic Impacts

As research undertaken in New Zealand in 2019 notes, comparisons of the economic value of the activities undertaken by freedom campers against tourists staying in commercial accommodation are 'non-existent'. Stemming from the results of the stakeholder engagement exercises conducted as part of this Donegal study, it is clear that there is a perception that wild camping is firstly having a negative impact on campsites themselves (who feel they are losing business) and secondly, there is a lack of clarity around the impact of such tourists on local economies (i.e. how much they spend in local businesses). The campervan user survey has shed some light on this question. The findings of the survey suggest that 41% of visitors spend more than €60 locally per day and 74% spend between 2-3 nights in one location.

4.5 Good Practice Case Studies: Deriving Key International Lessons

This section provides an overview of good practice internationally in strategically managing the sustainable development of the Camping, Caravan, and Camper van sector. Mediterranean regions in the South of France and the Algarve region of Portugal have been confronted with issues regarding wild camping and illegal or inappropriate motorhome parking for many years now. Regulations are vital in these regions as the risk of fires when wild camping is exceptionally high in the summer season where the land is so dry it becomes a fire hazard. In addition, the Lake District in Cumbria, UK and the Glenveagh National Park in County Donegal, although familiar with wild campers, the two National Parks recently witnessed a surge in visitors arriving in camper vans and motorhomes. This required action and the development of resources to welcome these visitors while continuing the work of conservation and protection.

Key lessons from these case study examples are organised thematically in the following sections.

4.5.1 Plan and Pre-book:

Cumbria Tourism (in the UK) have developed a range of new resources since the onset of the COVID-19 crisis to address to what it deemed to be a 'rapid rise in motorhome ownership over the past 12 months'. Visitors can access these before they arrive at: www.visitlakedistrict.com/vanlife. This helpful online hub includes downloadable maps, as well as practical hints to help people easily identify approved locations to stay and basic facilities like public toilets and waste disposal.

One of these maps is a 'motor caravanners accommodation map' – as illustrated below - which displays accommodation options across the county, including indicative pricing; seasonal opening arrangements; whether a one night stay is permissible and information on routes to and from campsites and towns (e.g. whether they are 'passable with care' in a motorhome or whether they might only be 'only recommended for accessing overnight locations'.)

MOTOR CARAVANNERS' ACCOMMODATION MAP

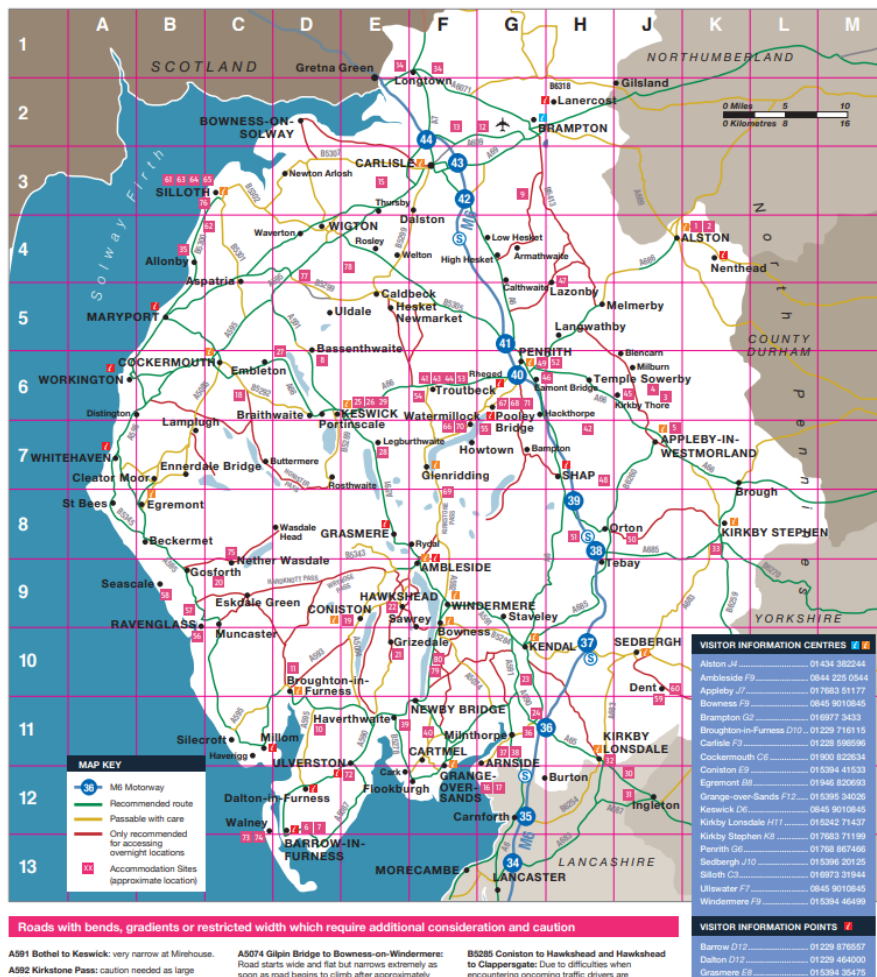


Figure 5: Lake District, Cumbria accommodation guide

The Lake District, Cumbria online hub supplies visitors with the resources to plan every aspect of their trip, from road accessibility to parking availability. Alongside the Visit Lake District – Van Life platform, visitors can avail of the Safer Lakes Website: <https://www.lakedistrict.gov.uk/visiting/car-park-status>, which specifies whether a car park is Busy, Fairly busy, or Not very busy. The website provides information on Car Park payment methods, facilities on-site, and if weekly parking is available.

4.5.2 Supply:

The measures taken in France and Portugal to tackle the situation consist of creating Camper van Stations known as “Aires de Service” or “Aires de Camping Car”. They are public or privately owned stations, some permitting overnight stay, some only offer waste disposal and water refill. Height restrictors are often put in entrances to car parks with directions given to appropriate motorhome stations to ensure the camper van visitor parks in the provided spots with the necessary facilities. The number of these service stations are multiplying all the time, with the French magazine “Le Monde Du Camping Car” (The world of a camper van) publishing its 2021 edition of guides to motorhome parking and industry insights. The number of stations provided offering at least waste and water disposal, and water refill stands at 4000 for the nation, with 1200 being completely free.

4.5.3 Inform:

Algarve Camping and Camper van association have been working towards a more strategic approach to the caravan, camping and camper van sector since 2006 when they carried out their first assessment of the region’s campsites and the number of pitches/spots available. The Algarve regional camping sector has grown dramatically since then, and the area now benefits from two tourism seasons, the summer season, and the emerging motorhome season from October onwards. This market consists mainly of retirees for whom the camper van acts as a second home.

Due to the high volume of motorhome travel in the Algarve, local municipalities, regional development and land management, environment and tourism authorities created “The Algarve Motorhome Support Network”. The project was the fruit of a cooperation agreement between the Algarve Regional Development and Coordination Commission, the Algarve inter-municipal Community and the Algarve tourism boards and associations to collaborate with Camping and Caravan Sites, Rural Camping parks, and Motorhome Service Areas.

The goal was to promote legal spots for overnight stopovers for the camper van tourist, to refill and dispose of waste. As part of this, an online hub for related resources has been developed (<https://autocaravanalgarve.com/>). This includes an interactive map of campsite locations – as illustrated in Figure 6.

In addition, the Algarve Motorhome support network distributed leaflets to motorhome visitors, directing them to facilitated Aires and camping parks. The initiative to inform these visitors via the online platform and leaflets was to stop illegal stopovers by creating quality and safe spaces that motorhome tourists demand and communicate these places effectively.

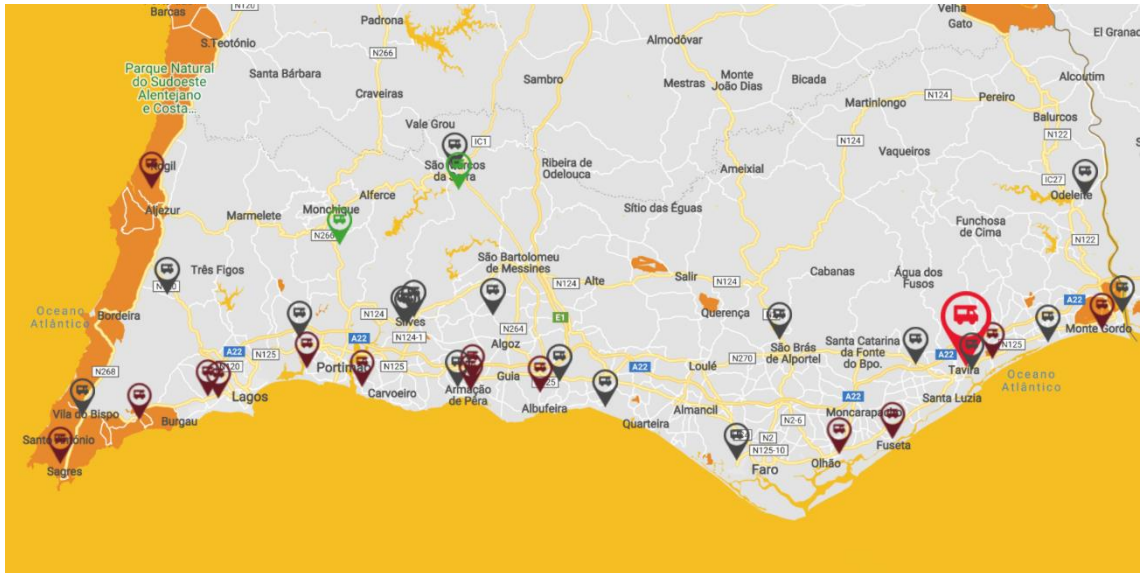


Figure 6: The Algarve Motorhome Support Network

The Portuguese association have been building on their work ever since to capture and manage this market. Because of their extensive experience in the camping and camper van industry over the past 15 years, the lessons from the region could bring prosperity and sustainability to the sector in Donegal and Ireland if applied accordingly.

4.5.4 Educate & Regulate:

Glenveagh National Park in North Donegal uses education and regulation as their approach to wild camping. It wasn't uncommon for hikers, orienteers, and other outdoor visitors to practice wild camping in the park. This experienced camper is discreet and respectful of the environment around them. To allow these visitors to experience the park overnight, the National Parks and Wildlife Services created regulations and a code of conduct, available on the Glenveagh National Park website. In addition, they designated exclusions zones and a permit system for protected zones.

4.5.5 The Digital Enabler:

In a growing digital environment, the caravan, camping and camper van sector is evolving. To their advantage, the internet enables campers and motorhome tourists across Ireland and Europe to actively participate in online social groups to share information on the availability of parking spots at destinations, as was stated by a spokesperson for Total Motorhome Ireland. Furthermore, research carried out by our Portuguese correspondent Alexandre Domingues shows retiree motorhome users are "tech-savvy" in that they tend to own and use digital gadgets and search for service stations and car parks online.

Online platforms are already extensively used in Ireland in the form of Facebook and WhatsApp groups, often promoting locations for wild camping across counties including Donegal. An official county platform for the sector would be the first of its kind in Ireland and give the motorhome user a trusting platform with legal, safe, and quality accommodation.

4.6 Policy Review

It is important to understand the policy frameworks in place at both a local, regional and national level to both inform and enhance future policy and planning frameworks regarding the development of both new and existing tourist facilities such as caravan, campervan and campsites. In line with this, a detailed policy context analysis and report has been produced for several counties along Ireland's West and South Coast. This analysis and report can be found in Appendix 2 of this document. Stemming from this, a policy review summary was produced and is outlined below. This policy review aims to illustrate the current state of caravan, campervan and campsite planning policy within other coastal counties in the West and South of Ireland in order to provide insights into how future planning policies may be shaped and enhanced within the Donegal context.

Policy Review – Planning Guidelines at a Glance

Planning policy and guidelines regarding the development of both new and existing caravan, campervan and campsite facilities varies across the county development plans of Ireland's West and South Coast. While certain county development plans present an absence of comprehensive guidelines or policies towards the development of tourist facilities such as caravan, campervan and campsites, others provide an extensive and broad suite of policies and guidelines to direct new tourist facility development.

However, throughout all county development plans reviewed as part of this policy context analysis, a common set of sentiments are shared throughout. **The nature of policy and guidelines across these development plans are primarily comprised of the adverse effects new tourist facility developments may have on the surrounding natural and built environment, and the effects on the visual amenity of these surrounding environments.** It is conveyed across the development plans that the character and value of these surrounding environments, such as high value amenity coastal areas, national heritage parks and rural settlements with rich and deep cultural value, inform the location, layout, design and operation of these new tourist facility developments. Within the development plans analysed, support from local authorities towards these new tourist facilities is given, conditional to these facilities demonstrating their ability to meet the guidelines proposed by local authorities.

Donegal – How the current guidelines stand...

It should be noted the current Donegal County Development Plan contains a comparatively comprehensive suite of policies and guidelines surrounding caravan,

campervan and campsite facilities relative to other county development plans along Ireland's West and South Coast, illustrating both the importance of this sector of Donegal's tourism industry and economy, but also Donegal County Council's recognition of the sector's growing importance and influence. Given these conditions within the sector, it is imperative to continue to development and improve new and existing policies and guidelines to ensure the sustainable development of the caravan, campervan and camping sector in Donegal and across the region.

How future policy and guidelines may be informed...

In line with the high standard of existing policies and guidelines within the Donegal development plan surrounding caravan, campervan and campsites, a list of recommendations for future policies and guidelines has been prepared and outlined in section 7. These recommendations would both reinforce the high standard of guidelines set within the current development plan, while also informing the development of new policies and guidelines to further strengthen Donegal County Council's position in managing the growth of the caravan, campervan and camping sector in Donegal.

5 Consultation Overview

As indicated in Section 3, a key stand of the research involved comprehensive stakeholder engagement. This involved the following:

- A series of semi structured interviews with key stakeholders including Donegal County Council; the NPWS; Fáilte Ireland, The Irish Caravan and Camping Council; Total Camping Ireland; Donegal Caravan and Camping Parks Association (DCCPA); Total Motorhome Ireland; several community representatives; and representatives from several international case study examples of good and best practice within the CCC sector.
- A series of online workshops with Elected Representatives across County Donegal
- A series of online surveys which received the following response rates:
 - Online Public Survey (1792 responses)
 - Online Service Provider Survey (61 responses)
 - Online Campervan User Survey (1195 responses)
 - Online Public Survey (As Gaeilge): 1 response
 - Online Camper van /motorhome survey (As Gaeilge): 0 responses

All relevant stakeholders were contacted by KPMG-FA during February – June 2021 and provided their feedback. Through consultation, the main issues, threats, and opportunities for the sector were identified.

5.1.1 Online Surveys

Ensuring a report which is comprehensively informed by the views, opinions and experiences of all relevant stakeholders is paramount to producing an effective strategy which is dynamic and versatile in addressing the current and future challenges and opportunities of the camping and caravan sector in Donegal.

As part of the study, five online surveys were produced and issued with a focus on engaging:

- 1 The residents and businesses of Donegal
- 2 The residents and businesses of Donegal (as Gaelige)
- 3 The motorhome and campervan user community
- 4 The motorhome and campervan user community (as Gaelige)
- 5 The current campsite service providers of Donegal

To ensure the online surveys succeeded in stimulating engagement across all the relevant stakeholder groups and parties, the surveys were promoted through various social media platforms, digital participatory platforms, the Donegal County Council website, Public Participation Network and through online motorhome and caravan groups.

The surveys garnered over 3,000 responses collectively:

- **Public Survey** – 1,792 responses
- **Motorhome and Campervan User Survey** – 1,195 responses
- **Campsite Owner Survey** – 61 responses
- **Suirbhé Poiblí** – 1 response
- **Motorhome and Campervan User Survey** - 0 responses

Public Survey Analysis

A total of six questions were included in the public survey. From these six questions, and stemming from detailed analysis of all responses, five key themes were developed and are utilised to present the findings of the survey analysis:

- 1 Opportunities
- 2 Maximising Opportunities
- 3 Issues
- 4 Areas with Issues
- 5 Minimising Negative Impacts

Opportunities

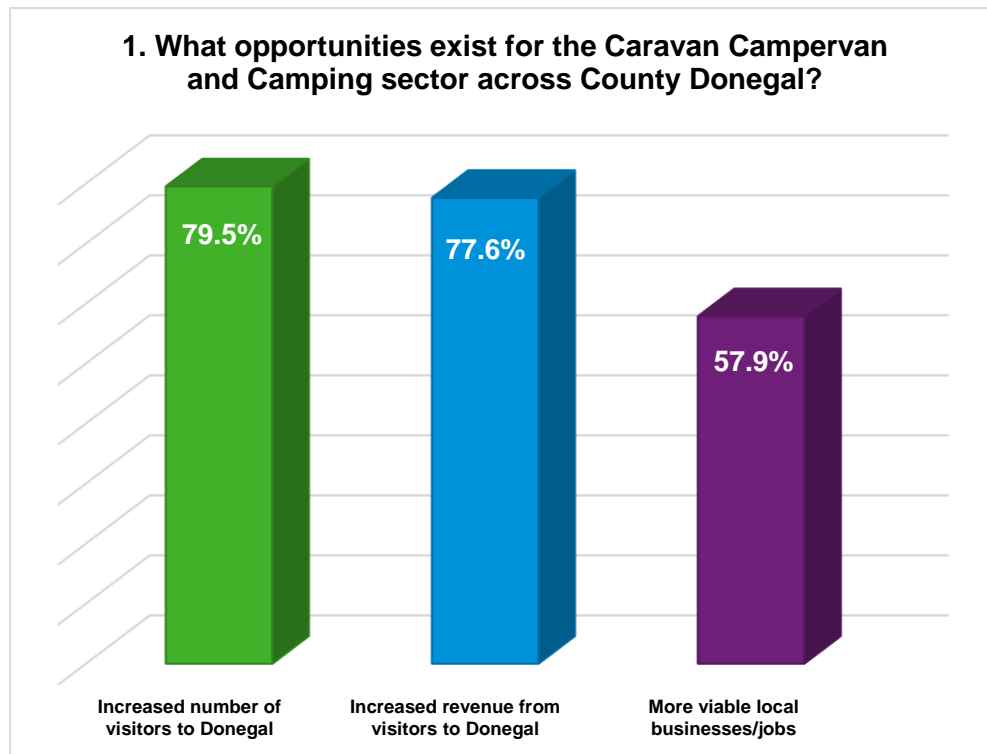


Figure 7: Public response on existing opportunities for the caravan and camping sector

Response options to Question 1 were measured by their frequency within respondent's answers. Respondents could select all or any options which applied or could include their own specific opportunities.

'Increased number of visitors to Donegal' and 'Increased revenue from visitors to Donegal' received the highest frequency within answers, appearing in **79.5%** and **77.6%** of answers respectively. 'More viable local businesses/jobs' appeared in **57.9%** of responses.

Responses which were novel to the prescribed response options included:

- **Better public services, facilities and amenities:** Frequent mention of the lack of facilities within Donegal areas which are popular for campervans, such as lack of bins and toilets, exploitation of free public parking by campervans - "**increased visitors but not revenue**". Mention of Aire de Service sites in Cobh and France were mentioned as best-case examples of how this can be achieved.

- **Promoting positive perceptions and attitudes:** Many respondents outlined the negative perceptions towards campervan and camping enthusiasts by locals in Donegal due to the nature of 'unregulated' camping around the county.
- **Attracting visitors from outside of Ireland:** Many responses highlight the promotion of campervan and camping in Donegal to a wider target audience when travel restrictions are eased. Similar to the popularity of camping and campervans in countries such as France where the industry is seen as positive for both local communities and wider French tourism in general.
- **Environmentally appropriate development of facilities:** Aspirations that any development or improvement of facilities should be in tandem with a promotion of the natural amenities which Donegal has to offer - which is a major draw for the Donegal tourism industry at present. Positive spill-over from promoting the development between both these aspects of Donegal campervans and camping.

Maximising Opportunities

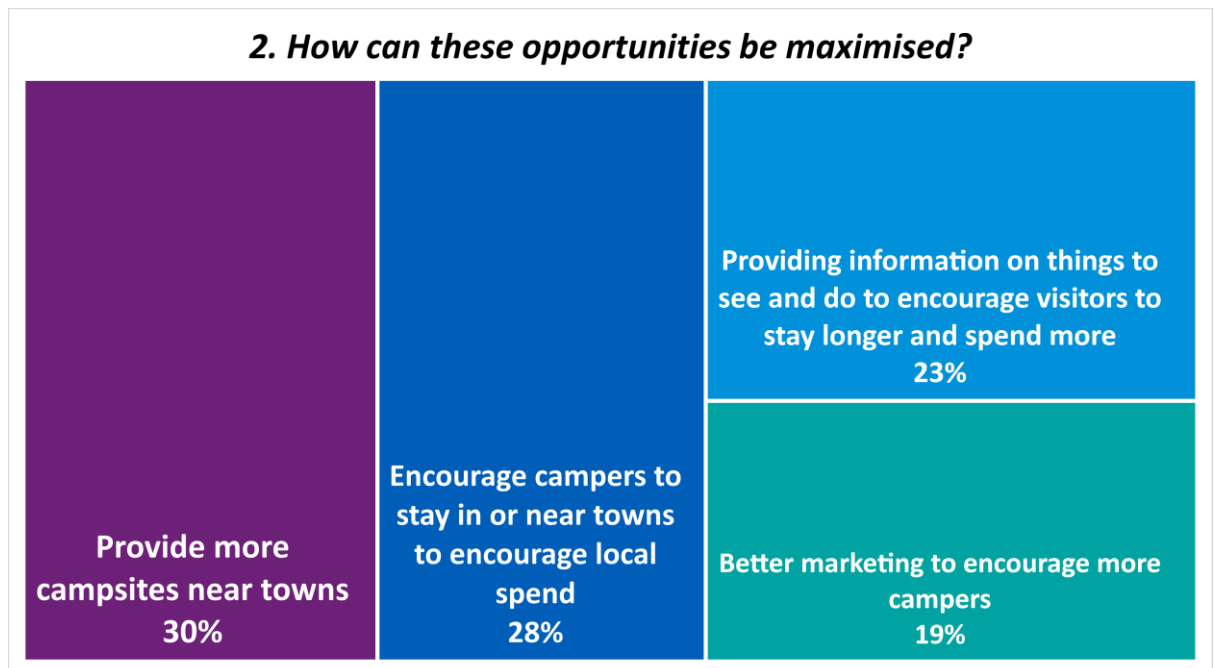


Figure 8: Public response on maximising opportunities

Response options to Question 2 were measured by their frequency within respondent's answers. Respondents could select all or any options which applied or could include their own specific answers.

- **Provide more campsites near towns:** Many responses outlined how campervans and campers would be more welcomed if appropriate facilities were provided for. This was outlined by respondents to be beneficial in both reducing the need for enforcement and fostering negative push factors while also increasing the social and

financial benefits of appropriate facilities being developed proximate to towns across Donegal.

- **Encourage campers to stay in or near towns to encourage local spending:** Paid facilities near to or in towns were seen as a way to increase revenue for the local economy, increase return business and 'slow tourism' if facilities are of a high standard. These measures were also seen by respondents as a mechanism to prevent the need for more regulation and enforcement due to current issues with inappropriate parking. Provision of improved facilities such as upgraded walking/cycling trails, access to beaches outlined as methods of retaining visitors for longer periods of time.
- **Providing information on things to see and do to encourage visitors to stay longer and spend more:** In line with responses which outline a need for more facilities and encouraging visitors to stay in or near to towns, providing information on things to do are seen as a mechanism to increase return business and 'slow

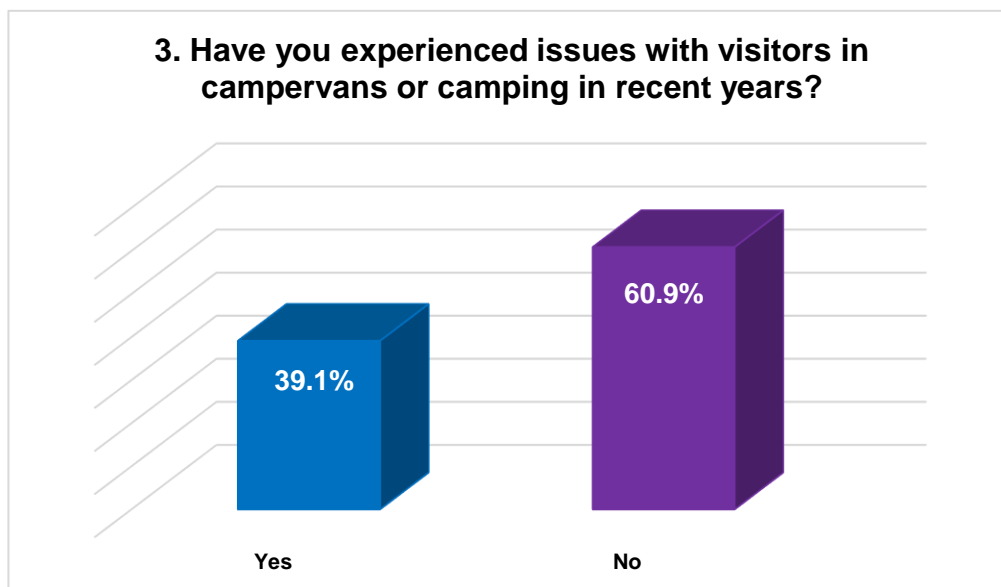


Figure 9: Public response on perception of issues associated with visitors in motorhomes and/or camping

tourism' if the provision and promotion of this information is of a high standard.

- **Better marketing to encourage more campers:** Work with motorhome groups such as Motorhome Craic to gain insights from forums, blog pages, trip reviews on how best to promote the current and future offerings for motorhome users and campers potentially visiting Donegal.

Issues

While only 39.1% of respondents to Question 3 experienced issues with visitors in campervans or campsites in recent years, this percentage represents over 700 respondents who have experienced issues. For respondents which experienced issues, Question 4 asked respondents to outline these specific issues.

Response options to Question 2 were measured by their frequency within respondent's answers. Respondents could select all or any options which applied or could include their own specific answers.

- **Parking at beach car parks:** inappropriate parking at beach car parks leading to obstruction of access for other beach users and 'day trippers' was outlined as the most common type of issue among respondents who have experienced issues with visitors in campervans or at campsites.
- **Overwhelmed facilities:** facilities that are frequently highlighted by respondents include those such as toilets, waste services (segregated bins; recycling, general, compost etc.). This is outlined as the second most common issue experienced by respondents.
- **Wild campers setting up on private land:** respondents highlighted how the lack of current wild camping provisions in Donegal has led to issues surrounding unauthorised wild camping on private land. Some respondents highlighted the unwelcoming attitudes of caravan and motorhome sites towards campers, leading to these issues.
- **Lack of economic benefit for communities:** The perception among respondents that many visitors in campervans or at campsites supply their own goods such as food and water which subsequently subtracts an important stream of income for local communities. Unauthorised parking is also seen as a mechanism which reduces the economic benefit campervans and campers could bring to Donegal communities as paid parking facilities are not availed of by visitors.

- **Anti-social behaviour:** Littering and noise complaints were the most common forms of anti-social behaviour expressed by respondents, with 'Anti-social behaviour' comprising 11% of all responses for Question 4.

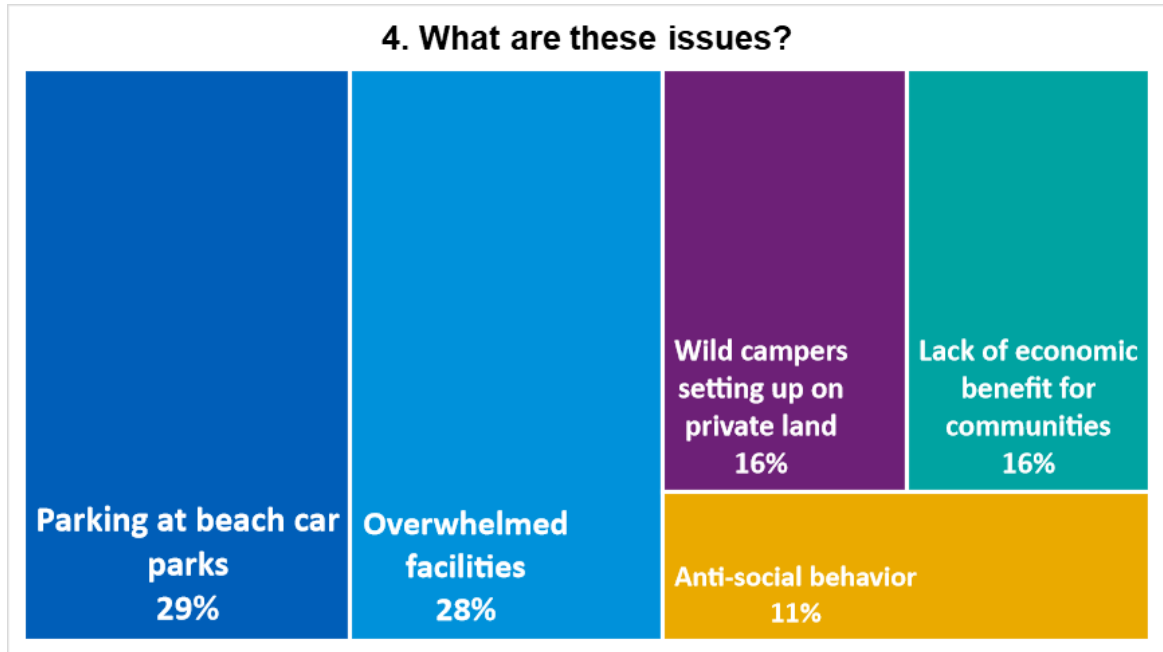


Figure 10: Public response on perceived issues with visitors camping and/or in motorhomes

Areas with Reported Issues

Respondents were asked to outline areas where they have experienced the issues described in Question 4. A total of 71 individual areas were highlighted by respondents. The frequency with which these areas appeared in respondents' answers were categorised and are outlined below. Areas with 5 or less appearances in all responses are not illustrated in the graphs below. **NOTE:** some areas may overlap/form a larger area which has not been illustrated in the graphs below.

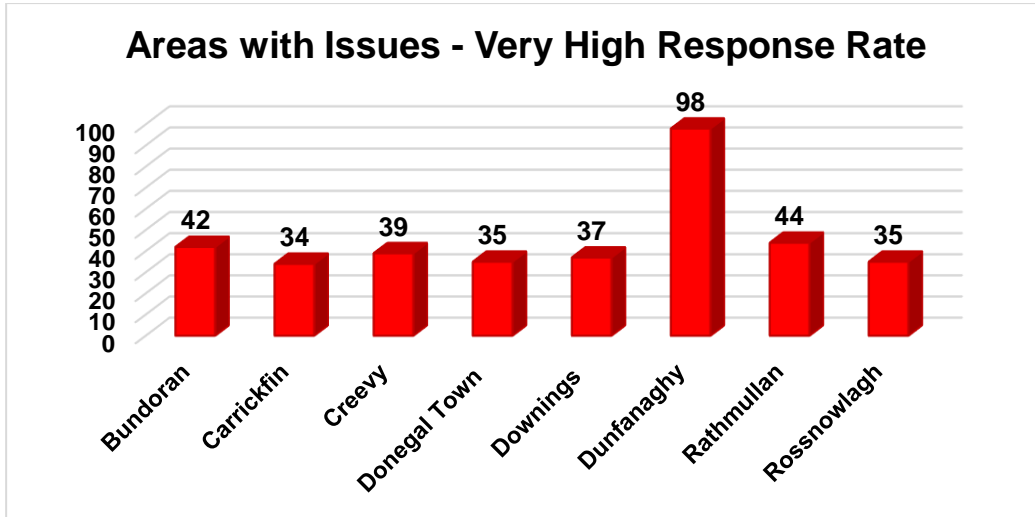


Figure 11: Public response of areas where perception of issues is very high

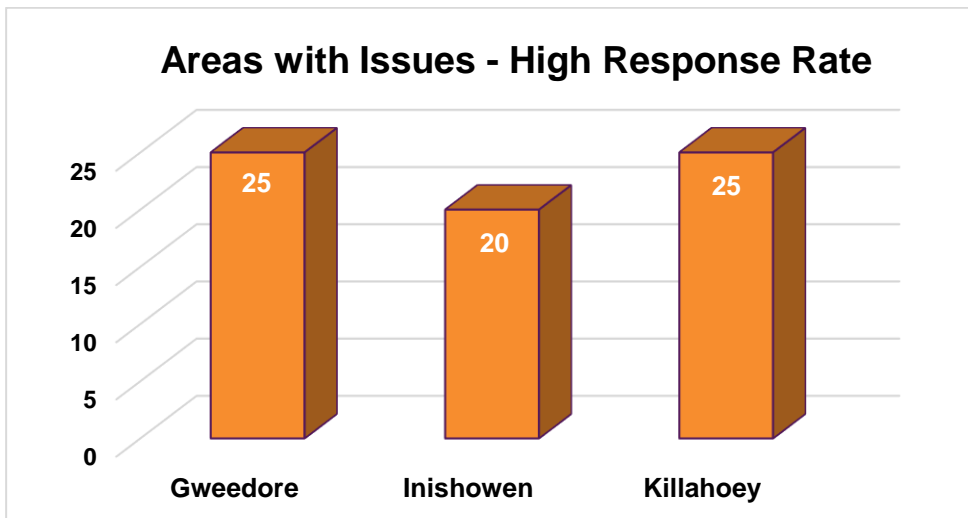


Figure 9: Public response of areas where perception of issues is high

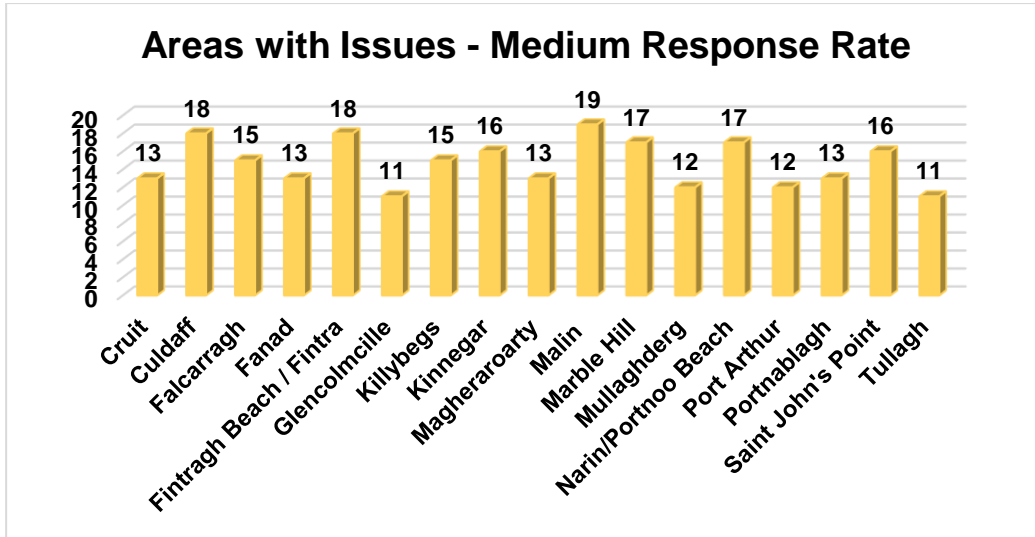


Figure 10: Public response of areas where perception of issues is medium

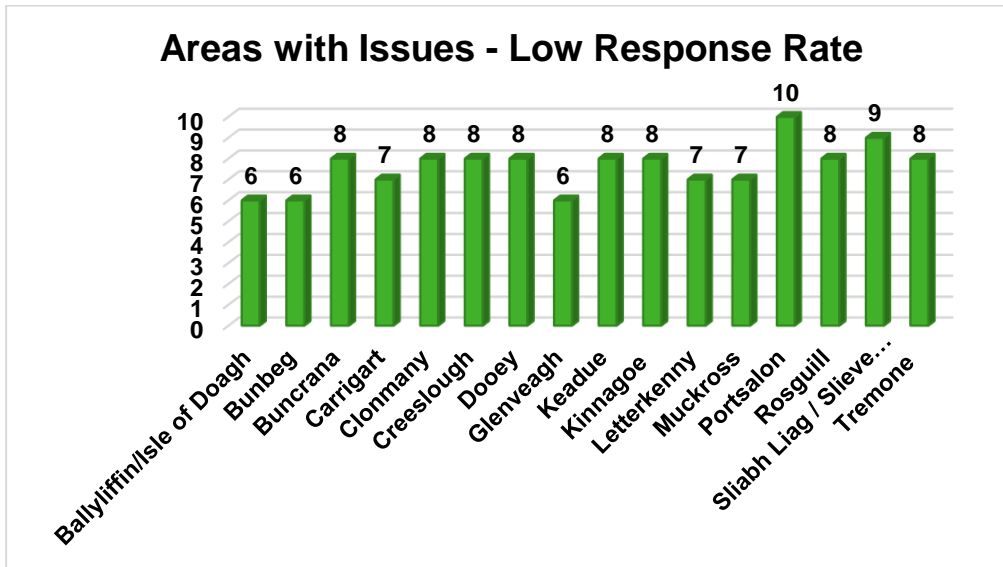


Figure 12: Public response of areas where perception of issues is low

The data derived from this question, centred on areas reported to be experiencing issues with wild camping, have subsequently been mapped and are shown below. Dunfanaghy was the location with the highest number of responses. However, it should be noted that these results are based only the number of respondents who indicated that they had witnessed or experienced issues at particular locations. As such, it is possible that some less populated towns and villages naturally recorded lower overall responses with regards the issues experienced in their area (due to a lower potential number of survey respondents). As such, this data should be supplemented and monitored on an ongoing basis based on issues registered with Donegal County Council. However, the additional stakeholder engagement exercises conducted also revealed similar patterns with regards the areas experiencing the most intensive issues – with Dunfanaghy mentioned in several stakeholder interviews.

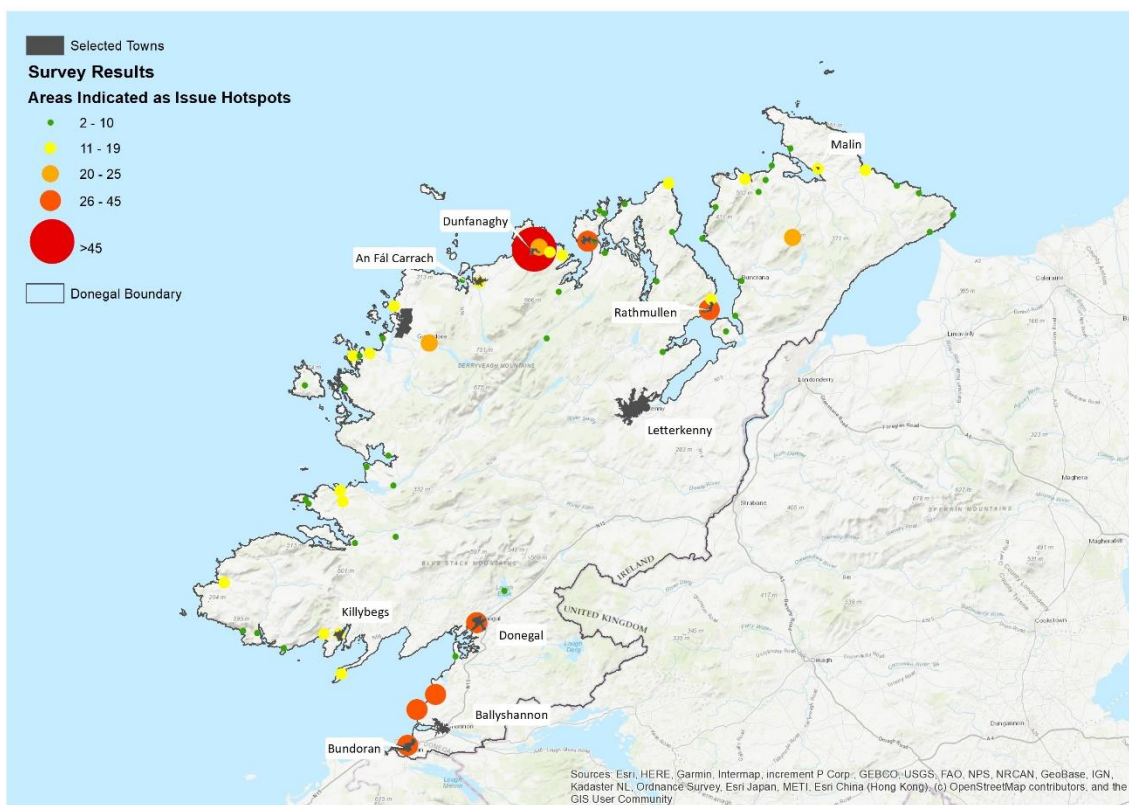


Figure 13: Areas indicated issue hotspots

Minimising Negative Impacts

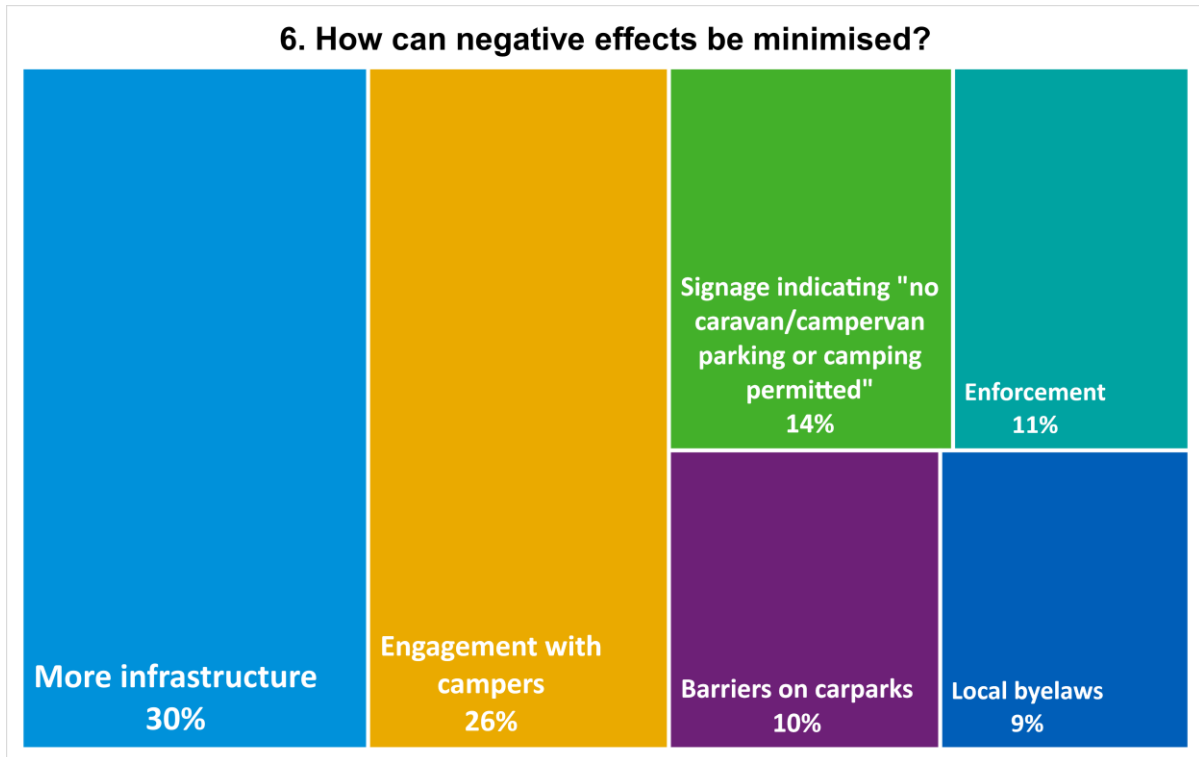


Figure 14: Public response on minimizing negative impacts

Response options to Question 6 were measured by their frequency within respondent's answers. Respondents could select all or any options which applied or could include their own specific answers.

- **More infrastructure:** this can include infrastructure ranging from improved roads and parking facilities to better waste management infrastructure and grey infrastructure (Broadband, 3g and 4g data coverage etc.) which will be able to accommodate current and future demand within the sector.
- **Engagement with campers:** consultation with campers and camper and motorhome/caravan groups and associations to both build positive relationships between interest groups and collaborate to produce sustainable solutions to current and future issues within the sector.
- **Signage indicating "no caravan/campervan parking or camping permitted":** measures associated with regulation appeared in 44% of respondents' answers. Signage appeared in 14% of respondents' answers.
- **Enforcement:** enforcement includes direct measures taken by the local authorities and An Garda Síochána in regulating and minimising the negative effects the caravan/motorhome and camping sector has on the communities of Donegal. This includes removal of campers and caravans from sites and enforcement of fines.

- **Barriers on carparks:** the instalment of height barriers at public and private car parks to prevent their use by campervan and motorhome users appeared in 10% of respondents' answers. Barriers at car parks are currently being employed at several car parks across Donegal.
- **Local byelaws:** relating to enforcement, the use, amendment and enforcement of both current and potential byelaws were identified by 9% of respondents as a measure to minimise the negative impacts of the campervan and camping sector in Donegal.

Motorhome and Campervan User Survey Analysis

A total of twelve questions were included in the motorhome and campervan user survey. From these twelve questions, eight sections were developed and used to present the findings of the survey analysis:

- 1 Visiting Counties and Trip Frequency
- 2 Most Visited Locations
- 3 Sources of Information
- 4 Vehicle Ownership and Trip Duration
- 5 Activities and Expenditure
- 6 Reasons for Visiting Locations
- 7 Reasons for Avoiding Locations
- 8 Ways to Improve Visitor Experience

Visiting Counties and Trip Frequency

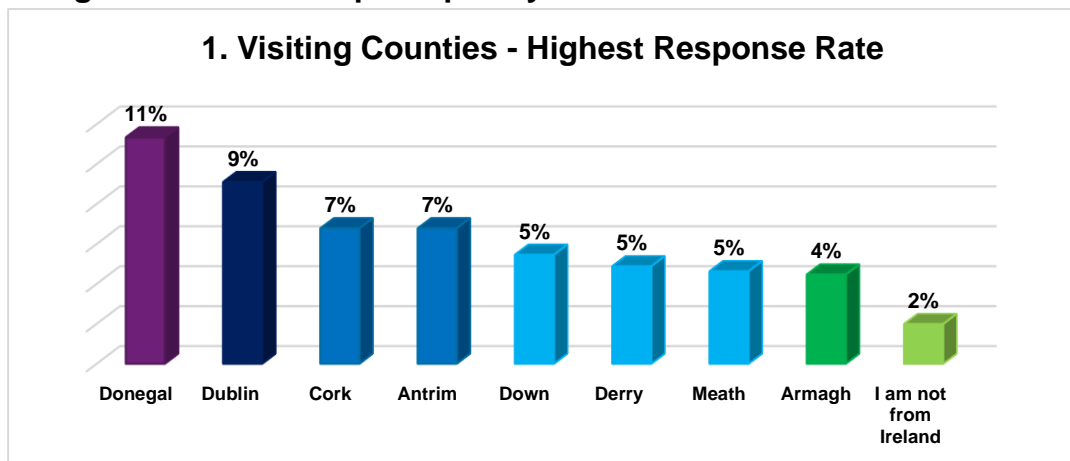


Figure 15: Visitor home county

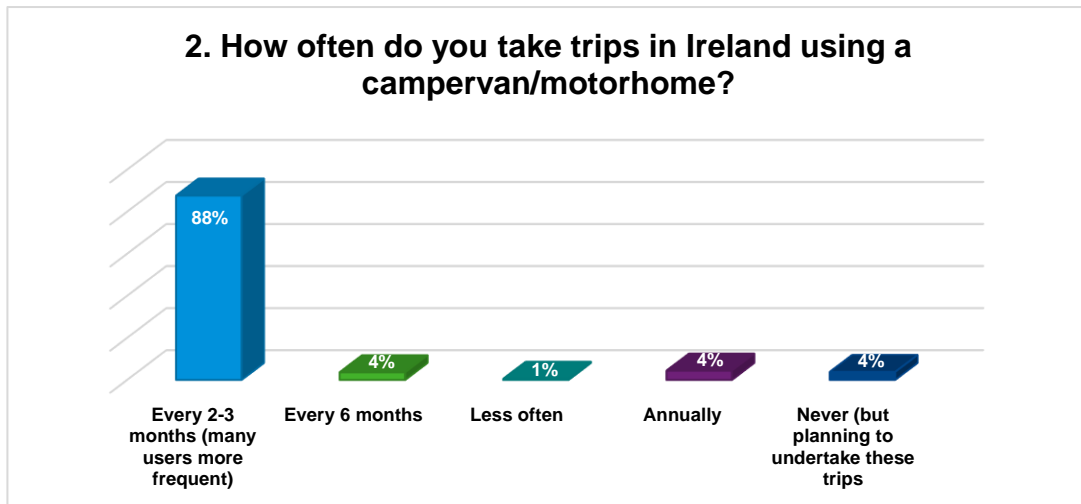


Figure 16: Frequency of domestic trips undertaken by visitors in touring vans

While 88% of respondents take trips in Ireland using a campervan/motorhome every 2-3 months, many respondents highlighted they take trips **more frequently** than the options provided, with many taking trips using a campervan/motorhome every **2-3 weeks**. **92%** of campervan users took trips at least every 6 months

Donegal has the **highest percentage share** of campervan users visiting, indicating domestic travel within the county is high. Campervan users from Northern Irish counties **Antrim, Down, Derry** and **Armagh** comprise **21%** of campervan users visiting Donegal. Dublin and Meath comprise **14%** of campervan users visiting Donegal while Cork comprises **7%**. Surrounding and border counties of Tyrone, Fermanagh, Leitrim and Sligo comprise **9%** of campervan users visiting Donegal.

Most Visited Locations

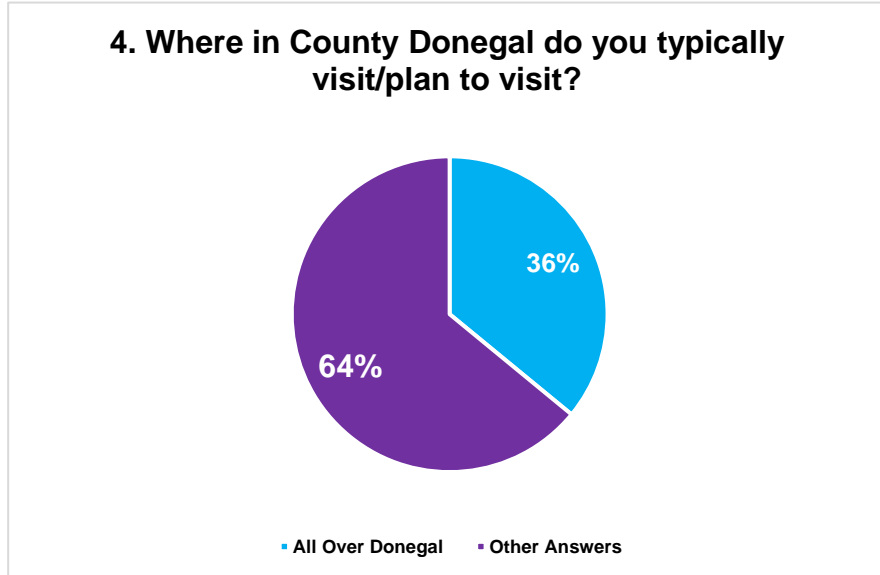


Figure 17: Where visitors in touring vans travel to

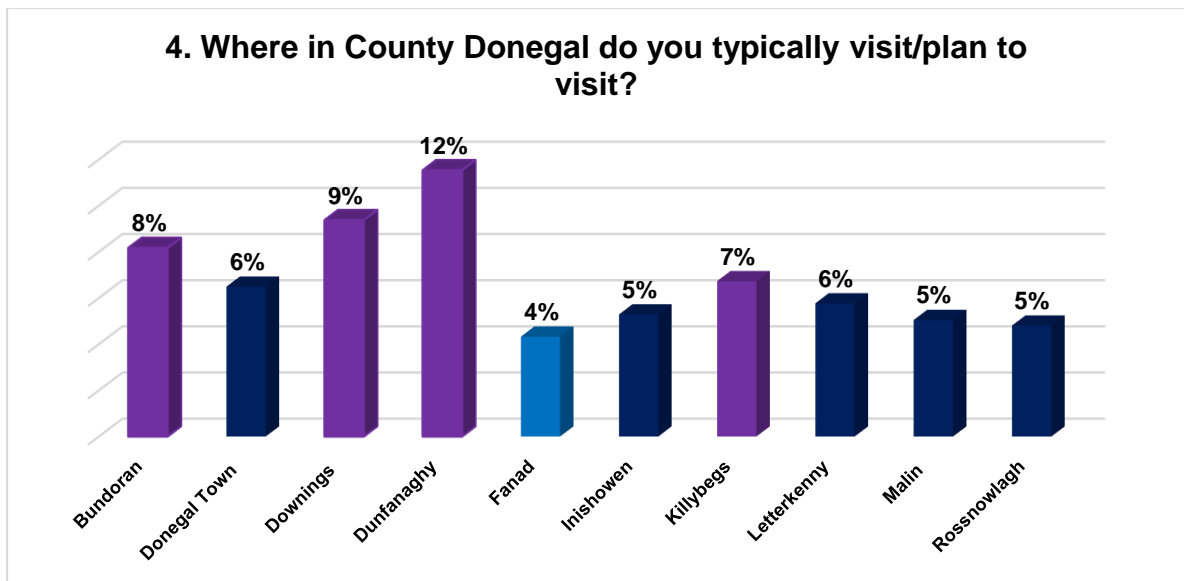


Figure 18: Towns visitors travel to in touring vans

Areas with the highest number of issues in the public survey correlate to several areas outlined as the most visited areas by campervan and motorhome users. The areas of **Dunfanaghy**, **Downings** and **Bundoran** are outlined in the public survey as areas with the highest number of issues. These areas comprise **29%** of visits in Donegal by campervan and motorhome users.

Dunfanaghy, **Bundoran** and **Donegal Town** are outlined frequently by respondents as areas where motorhome and campervan users have experienced **anti-social behaviour** and been made to feel **‘unwelcome’**.

36% of campervan and motorhome users travel to several locations or ‘All over Donegal’.

Sources of Information

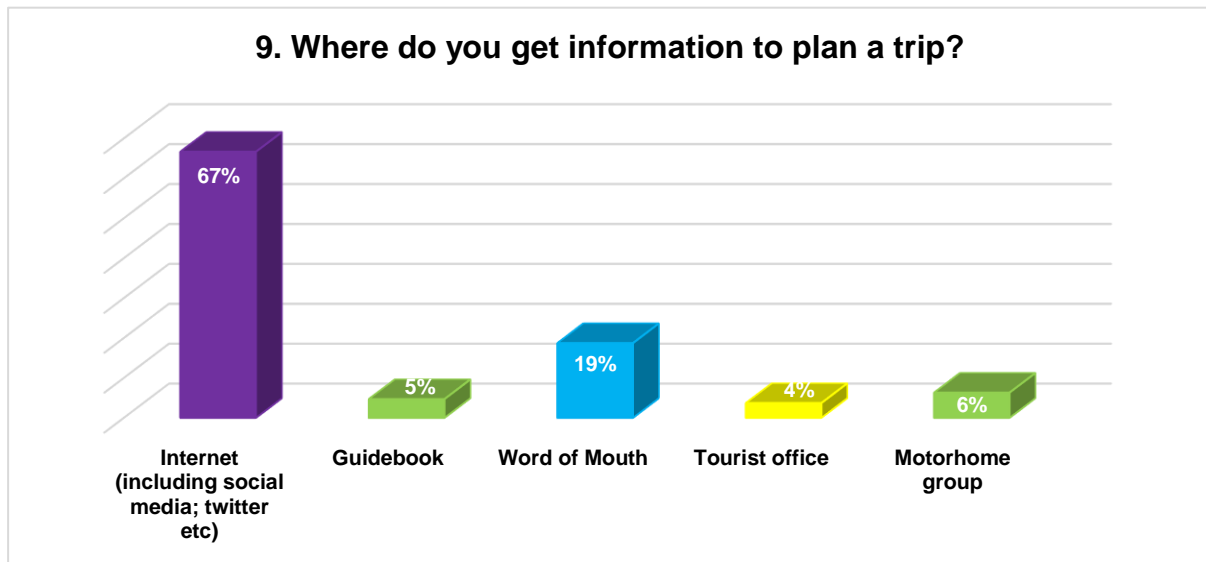


Figure 19

: Sources of information for visitors travelling to Donegal in touring vans

73% of information is sourced from digital mediums (‘Internet’ and ‘Motorhome group’).
19% of information is sourced from informal mediums (‘Word of Mouth’).
9% of information is sourced from traditional tourism mediums (‘Guidebook’ and ‘Tourist Office’)

These results reflect the trends of increased importance on digital mediums as a means for promotion and advertisement currently experienced by the tourism sector, both nationally and internationally. As such, many recommendations and opportunities outlined by respondents in subsequent questions involve the use of digital means to promote, advertise and develop the quality of the campervan/motorhome and camping sector in Donegal.

Vehicle Ownership and Trip Duration

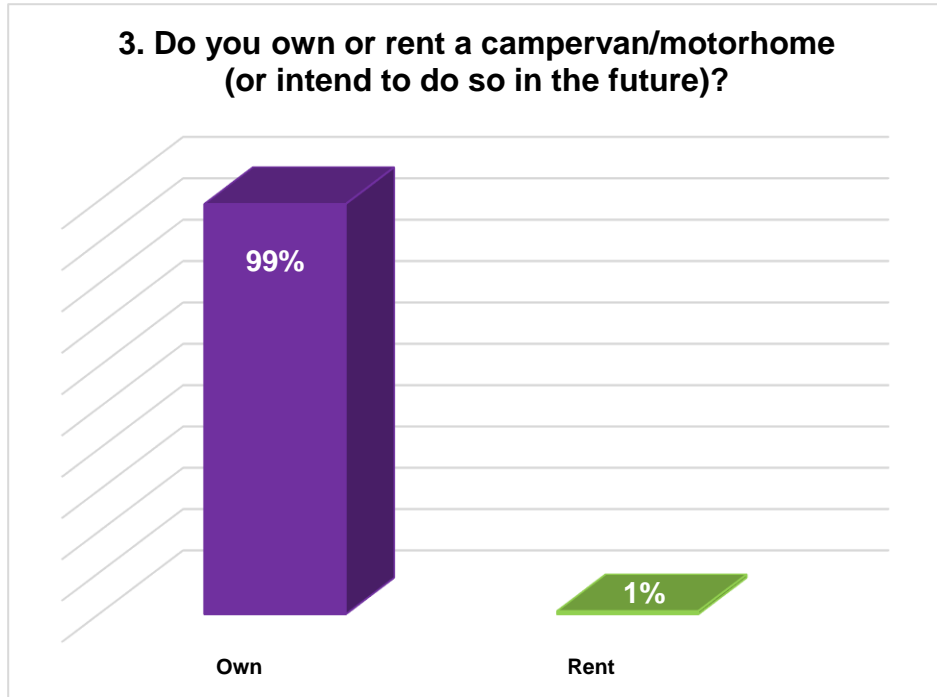


Figure 20: Percentage of visitors who own or rent a touring van

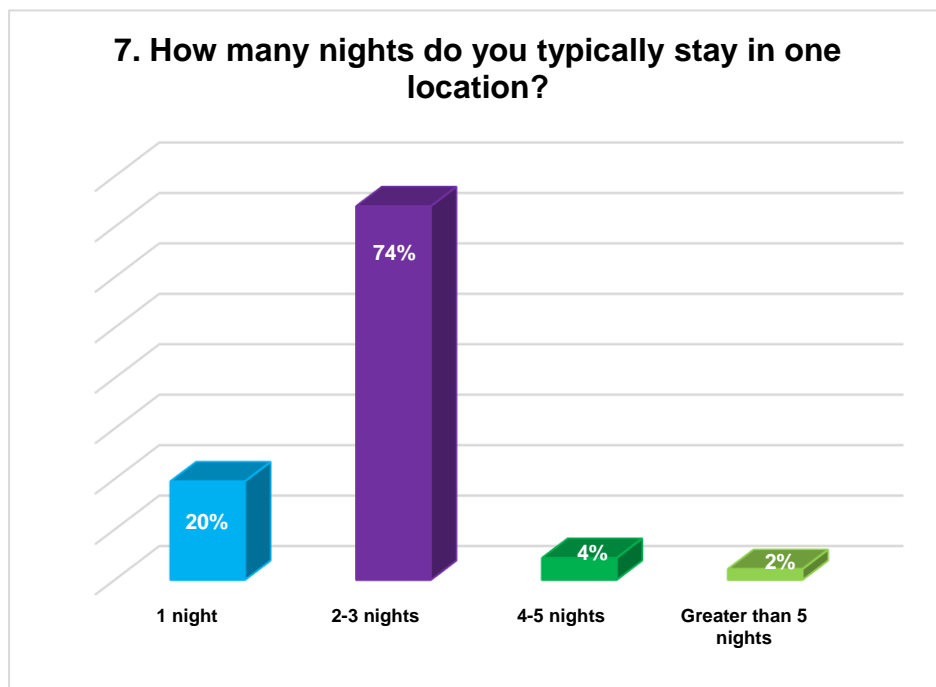


Figure 21: Number of nights stayed per visit

Of the respondents to the survey, 99% stated they owned a campervan, with 1% stating they rented.

The majority of respondents visited and stayed in particular locations for 3 nights or less, with **74%** of respondents typically spending **2-3 nights** at one location and **20%** staying for only **1 night**. In total, **94%** of respondents stayed at one location for **3 nights or less**.

Activities and Expenditure

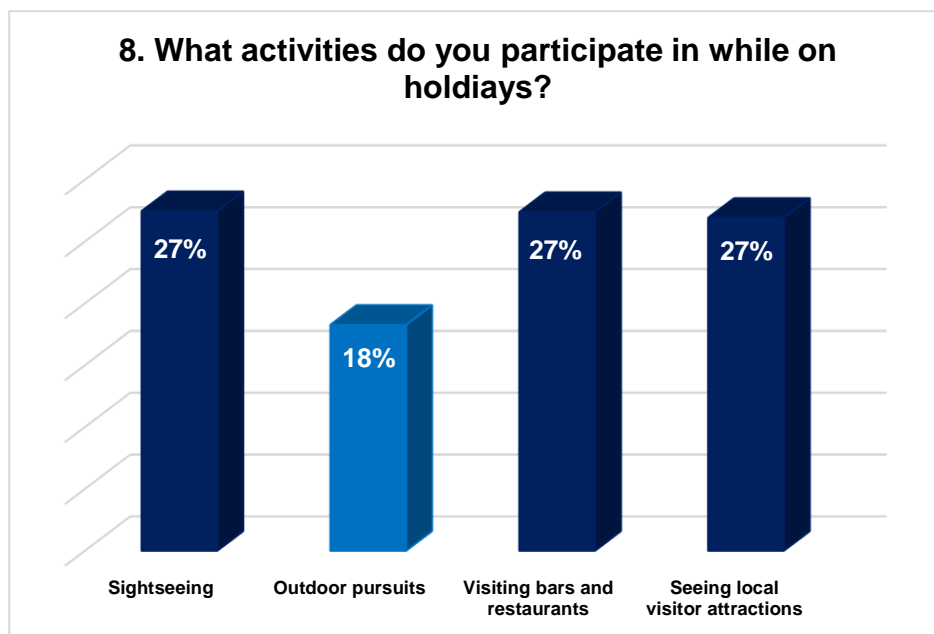


Figure 22: Activities undertaken whilst visiting in a touring van

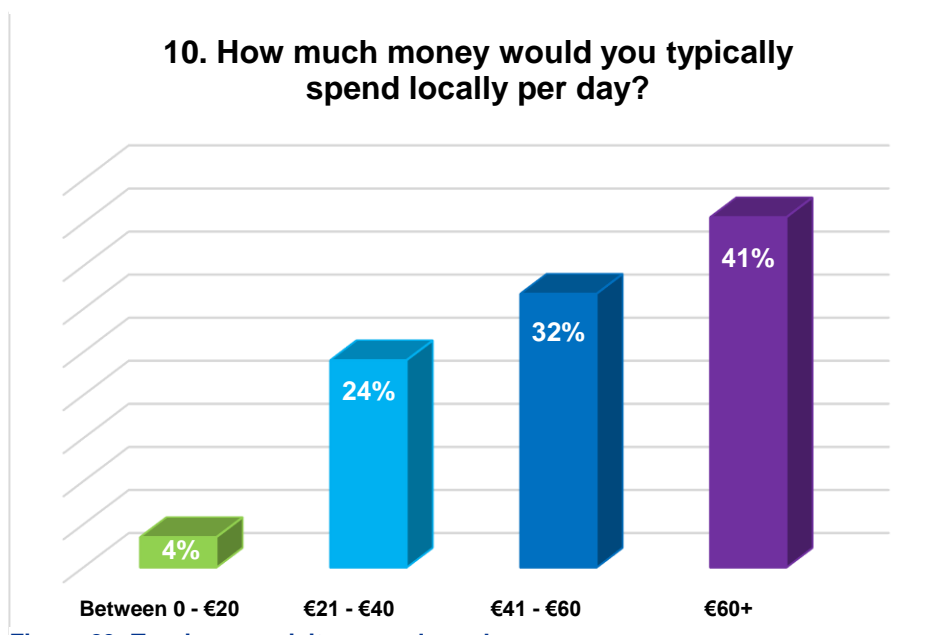


Figure 23: Touring van visitor spend per day

Over 50% of respondents participate in visiting bars, restaurants and/or seeing local visitor attractions – these can be seen as *paid activities*.

45% of respondents participate in sightseeing and/or undertaking outdoor pursuits – which can be perceived as *non-paid activities*. **Over 50%** of respondents spending between **€50 - €150** per location (based on average 2.5 nights stay) **Over 40%** of respondents spending **greater than €150** per location (based on average 2.5 nights stay)

Reasons for Visiting Locations

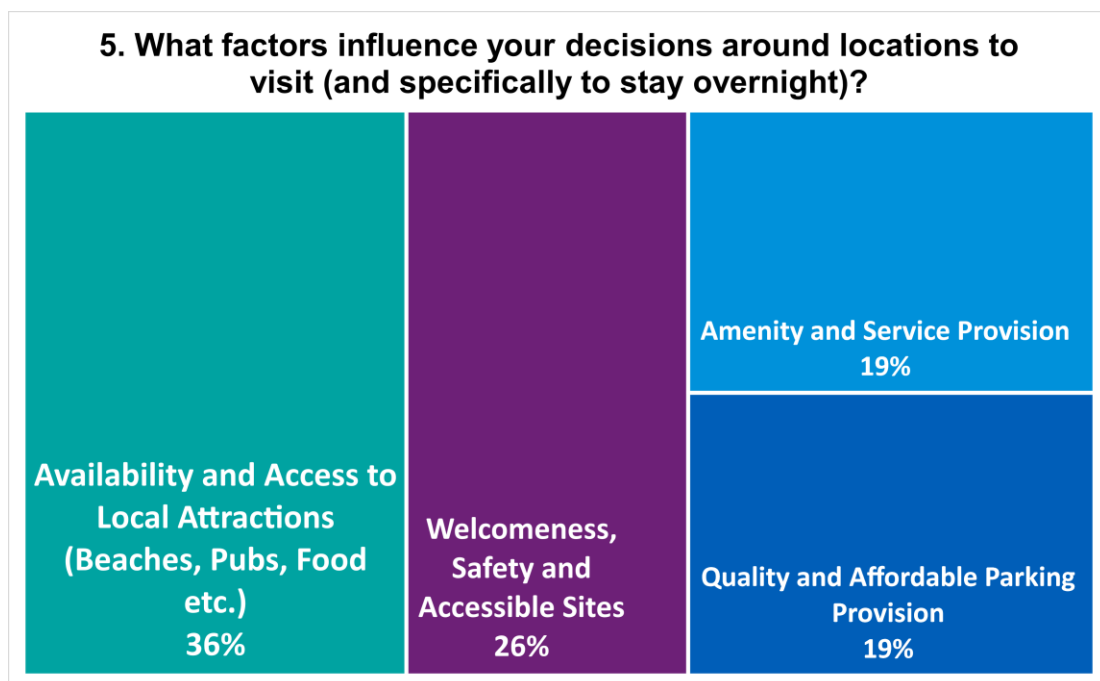


Figure 24: Influences on visitor decisions on which location to visit

Due to the qualitative nature of responses to Question 5, responses were categorised by theme and taken as a percentage of all responses. While the responses were categorised under the four themes in Figure 23 (above), Many responses contain a combination of the themes outlined above - or the '*overall experience offered*'.

- **Availability and Access to Local Attractions:** The main combination of themes within answers is a blend of both accessible and affordable sites which are proximate to local attractions, amenities and facilities - these include **scenery / natural amenity** along with offerings in towns and villages such as **pubs, restaurants, toilets and local shopping**.
- **Welcomeness, Safety and Accessible Sites:** The attitudes of locals and service providers towards visitors was outlined as a significant influencing factor towards visiting potential locations. Being made to feel welcome and

safe was often indicated by respondents as the most important factor towards choosing a location to visit, often trumping other factors such as amenity/facility provision, affordability and availability.

- **Amenity and Service Provision:** The availability of services such as waste disposal, fresh water, toilets and showers and electrical hook-up was outlined by many respondents as many visitors who are campers or campervan users do not have many of these services installed into their vehicles.
- **Quality and Affordable Parking Provision:** The availability and accessibility of affordable parking with dedicated spaces for motorhomes and campers appeared in 19% of all responses. Many respondents outlined how visitors are willing to pay between €10-€15 per night for high quality and dedicated motorhome and campervan parking.

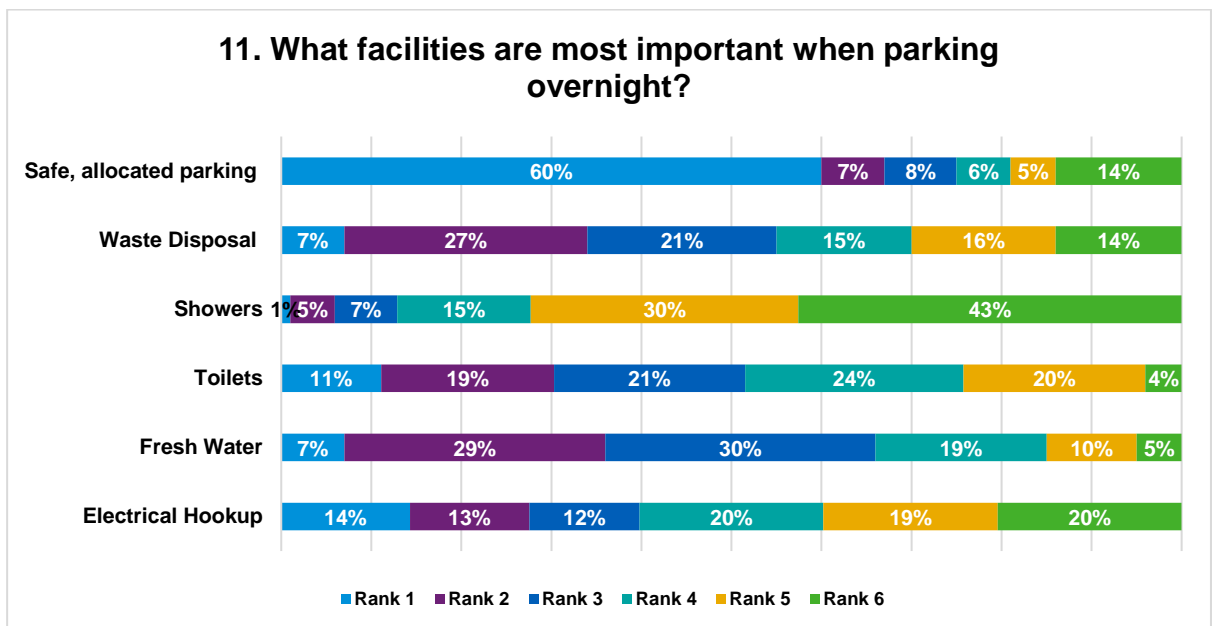


Figure 25: Overnight parking facilities ranked by order of importance

In Question 11, respondents were asked to rank the prescribed services/facilities by importance from Rank 1 to Rank 6. The frequency with which these facilities appeared in responses is illustrated in Figure 24 above.

‘Top 3 Frequency’ is the percentage share each facility appeared in respondents’ top 3 ranked facilities:

- ‘*Safe allocated parking*’ appeared in **75%** of respondents’ top 3 most important facilities
- ‘*Waste disposal*’ appeared in **55%** of respondents’ top 3 most important facilities
- ‘*Showers*’ appeared in **13%** of respondents’ top 3 most important facilities
- ‘*Toilets*’ appeared in **51%** of respondents’ top 3 most important facilities
- ‘*Fresh Water*’ appeared in **66%** of respondents’ top 3 most important facilities

— ‘Electrical Hookup’ appeared in **39%** of respondents’ top 3 most important facilities

The three facilities which were highlighted as the most important by respondents are outlined below:

- 1 **Safe, allocated parking** had a top 3 frequency rate of **75%**
- 2 **Fresh Water** had a top 3 frequency rate of **66%**
- 3 **Waste Disposal** had a top 3 frequency rate of **55%**

Reasons for Avoiding Locations

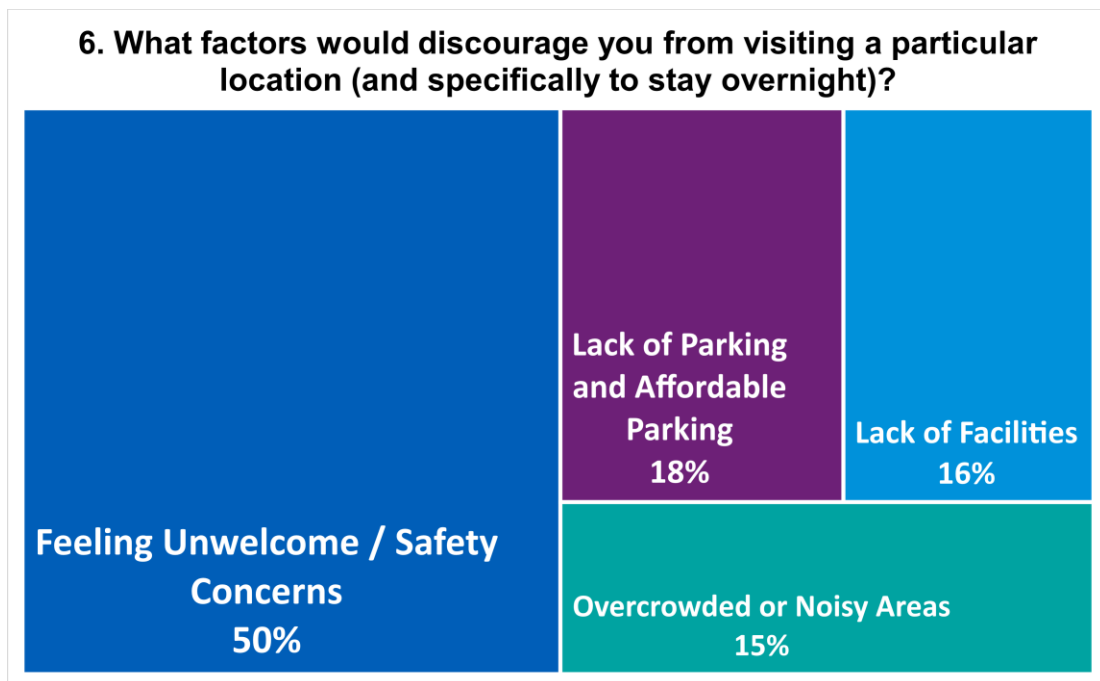


Figure 26: Factors that would prevent visitors from staying at a location

Due to the qualitative nature of responses to Question 5, responses were categorised by theme and taken as a percentage of all responses. While the responses were categorised under the four themes in Figure 25 (above), Many responses contain a combination of the themes outlined above.

- **Feeling Unwelcome/Safety Concerns:** Safety and feeling unwelcome in an area is the prevailing push factor regarding choice of location for campervan users, appearing in 50% of respondents’ answers. Many respondents get this information through social media groups and word of mouth, while others see the use of barriers or restrictive signage as indicators of an unwelcome and abrasive attitude towards campervans and motorhome users. Many feel that motorhome users are given a bad reputation by a small minority of motorhome users which then reflects the restrictive measures put in place by both the

local authority and private landlords and communities alike. Bundoran, Dunfanaghy and Donegal Town outlined as a particular location where motorhome users feel unwelcome.

- **Lack of Parking and Affordable Parking:** the availability and affordability of parking was seen as a significant push factor when compared to similar availability and affordability in countries such as France and Portugal.
- **Lack of Facilities:** Lack of facilities such as fresh water, bins, waste disposal and toilets are significant deterrents towards choice of location.
- **Overcrowded or Noisy Areas:** Given many campervan and motorhome users are comprised of retired families and families with children, overcrowded and noisy areas are another significant push factor. Noisy areas and safety concerns overlap in issues surrounding “boy racers” using car parks at night or driving at excessive speeds on local roads.

Ways to Improve



Figure 27: Measures to improve the parking experience in County Donegal

Due to the qualitative nature of responses to Question 5, responses were categorised by theme and taken as a percentage of all responses. While the responses were categorised under the four themes in Figure 26 (above), Many responses contain a combination of the themes outlined above.

- **More allocated and Safe Parking:** A split in survey responses between those who would like to see serviced sites for parking, which are more accommodating for campervans and campers, or non-serviced sites, which

are more accommodating for motorhomes. Most respondents outline how more overnight parking for a small fee (€15 max) would benefit the motorhome community in Donegal.

- **More welcoming:** Creating a more positive and welcoming attitude towards the camping and caravan sector in Donegal by both local authorities, the public and local business in tandem with creating improved parking facilities and campsites. Safety was also highlighted frequently as a key aspect of Donegal motorhome and campervan facilities in future, as many motorhome and campervan users are elderly or have children.
- **Better services at campsites and attractions:** the provision of waste facilities such as bins, fresh water, electrical hook-ups and toilet facilities at campsites and attractions such as beaches and other popular tourist attractions were outlined as mechanism to help address local issues with campers, campervans and motorhome users.
- **Accessible Sites:** Sites which are accessible for both campers and motorhomes which are both proximate to towns and villages while also providing sites which are proximate to attractions and sites of interest

Campsite Owner Survey Analysis

A total of fourteen questions were included in the campsite owner survey. From these fourteen questions, six thematic sections were developed and used to present the findings of the survey analysis:

- 1 Business in 2021
- 2 Business Promotion
- 3 Campsite Performance
- 4 Aire de Service Sites
- 5 Issues and Challenges
- 6 Opportunities and Interventions

Business in 2021

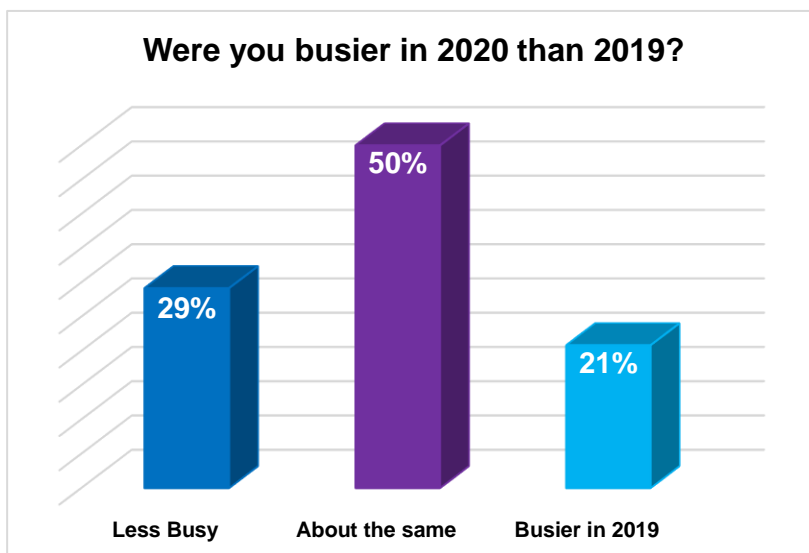


Figure 28: Occupancy levels of holiday parks/campsites in 2020 compared to 2019

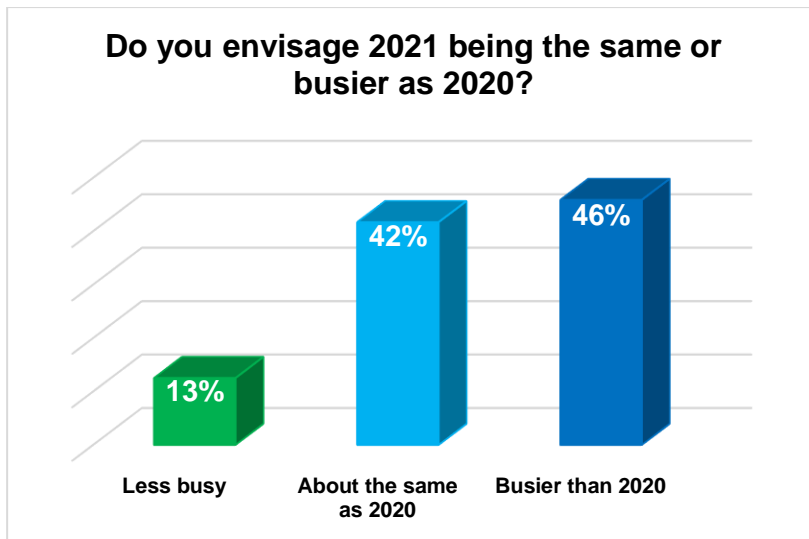


Figure 29: Holiday parks/campsites sentiment on future occupancy levels

While **50%** of respondents outlined how business had remained constant from 2019 to 2020, **46%** of respondents expect to have a **busier year** in 2021

29% of respondents outlined how business was slower in 2020 compared to 2019, but only **13%** predict **less business** in 2021.

Business Promotion

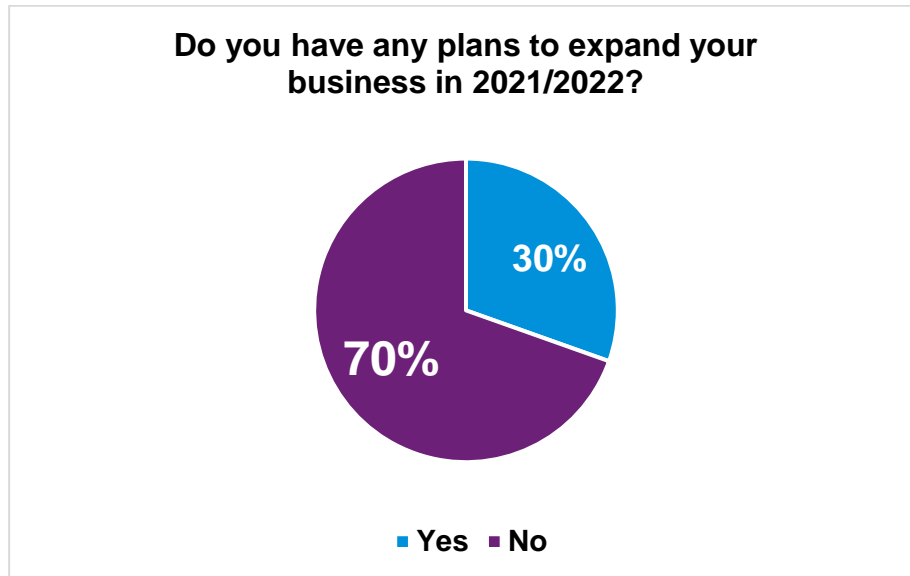


Figure 30: Holiday parks/campsites intentions to expand



Figure 31: Holiday parks/campsites route to market

While **46%** of respondents predict to be busier in 2021 compared to 2020, **70%** of respondents did not have plans to expand in 2021.

54% of respondents advertise their business through ‘**digital mediums**’ (*Social Media, Go Visit Donegal and Fáilte Ireland*)

15% advertise their business through ‘**traditional advertisement mediums**’ (*Advertising in trade magazines*)

24% do not advertise at all

6% advertise through 'informal mediums' (*Word of Mouth*)

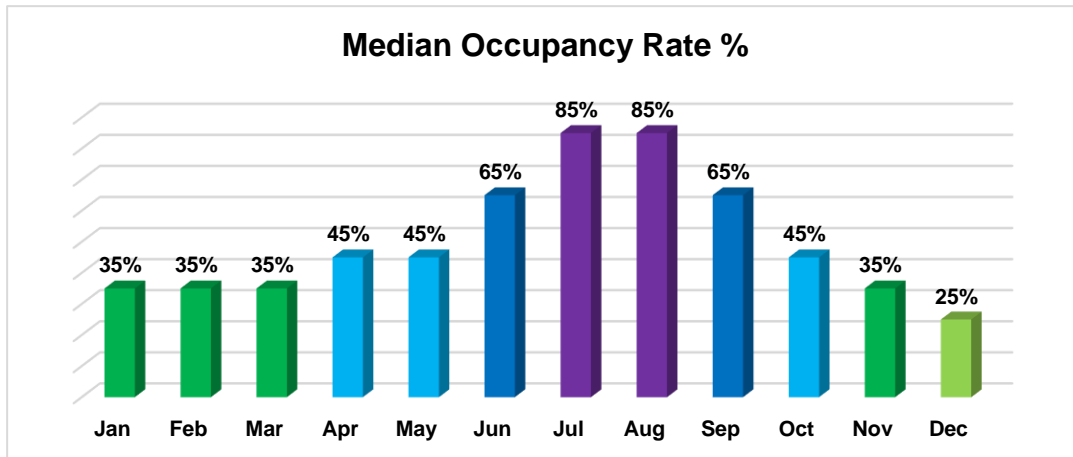


Figure 32: Holiday parks/campsites median occupancy rates

The months of **June, July, August** and **September** have the **highest average occupancy** throughout the year, with an average occupancy rate of **75%**. The months of **July** and **August** had the **highest occupancy** rate per month, both having **85%** occupancy. The month of **December** has the lowest occupancy rate throughout the year, with an average occupancy rate of **25%**.

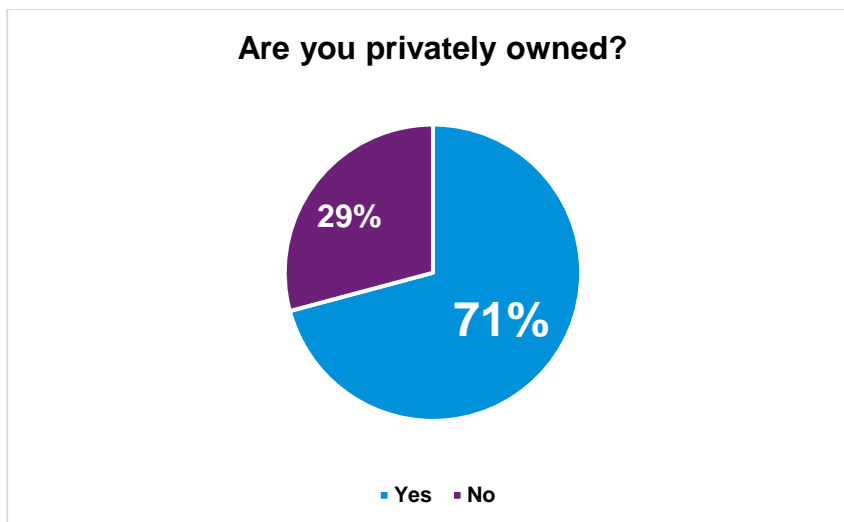


Figure 33: Holiday parks/ campsites status of ownership

Of the 61 responses to the campsite owner survey, 71% of respondents' campsites are privately owned, with 29% not being privately owned

Aire de Service Sites

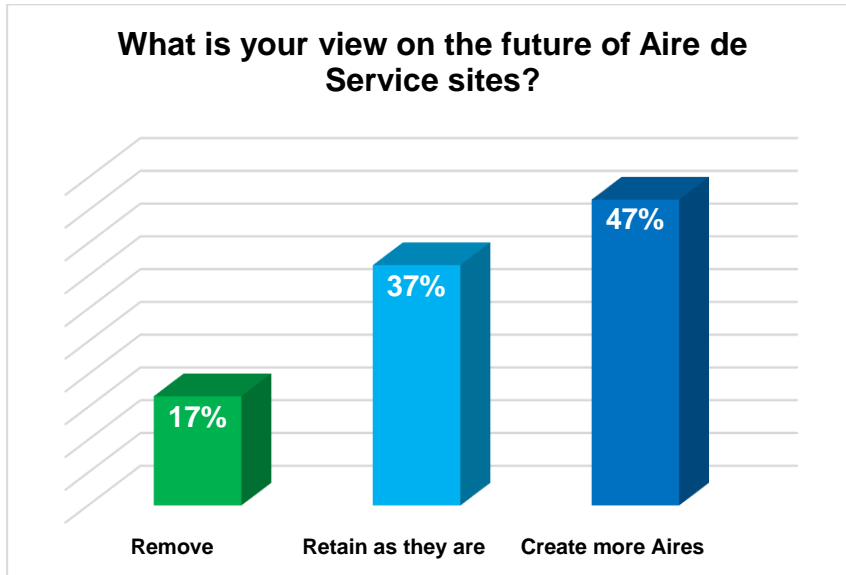


Figure 34: Holiday parks/campsites on the future of Aire De Service sites

47% of respondents believe creating more Aire de Service sites is the future of their role in the Donegal caravan and camping sector, while **17%** believe removing Aires is the future of their role in Donegal. The remaining **37%** of respondents see no need for change in the current status of Aires in Donegal.

Issues and Challenges

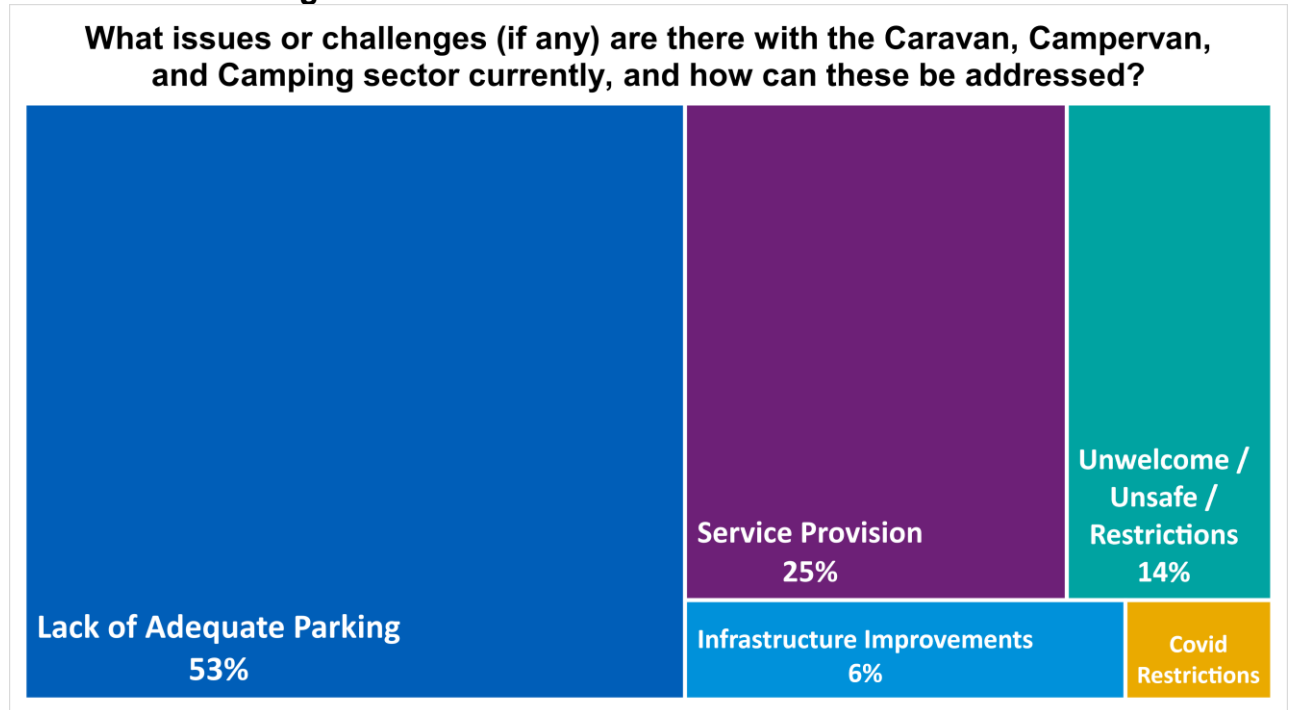


Figure 35: Issues with the caravan, camper van, and camping sector

Due to the qualitative nature of responses to Question 12, responses were categorised by theme and taken as a percentage of all responses. While the responses were categorised under the five themes in figure 34 (above), Many responses contain a combination of the themes outlined above.

Lack of Adequate Parking: the availability and affordability of parking was seen as a significant push factor when compared to similar availability and affordability in countries such as France and Portugal. This theme comprised **53%** of all responses.

Service Provision: services that are frequently highlighted by respondents include those such as toilets, waste services (segregated bins; recycling, general, compost etc.). This is outlined as the second most common issue/challenge experienced by respondents.

Unwelcome, Unsafe and Restrictions: Campervans and motorhomes not being treated as valid, legitimate or lucrative tourists are outlined as a challenge for campsite owners. This has been highlighted in the form of unwelcoming attitudes, unsafe parking facilities and restrictions (both physical and legislative) on motorhome and campervan users.

Infrastructure Improvements: this can include infrastructure ranging from improved roads and parking facilities to better waste management infrastructure and grey infrastructure (Broadband, 3g and 4g data coverage etc.) which will be able to accommodate current and future demand within the sector.

Covid Restrictions: The COVID-19 virus, subsequent pandemic and public health restrictions were outlined as current and potentially future challenges to campsite owners.

Opportunities and Interventions

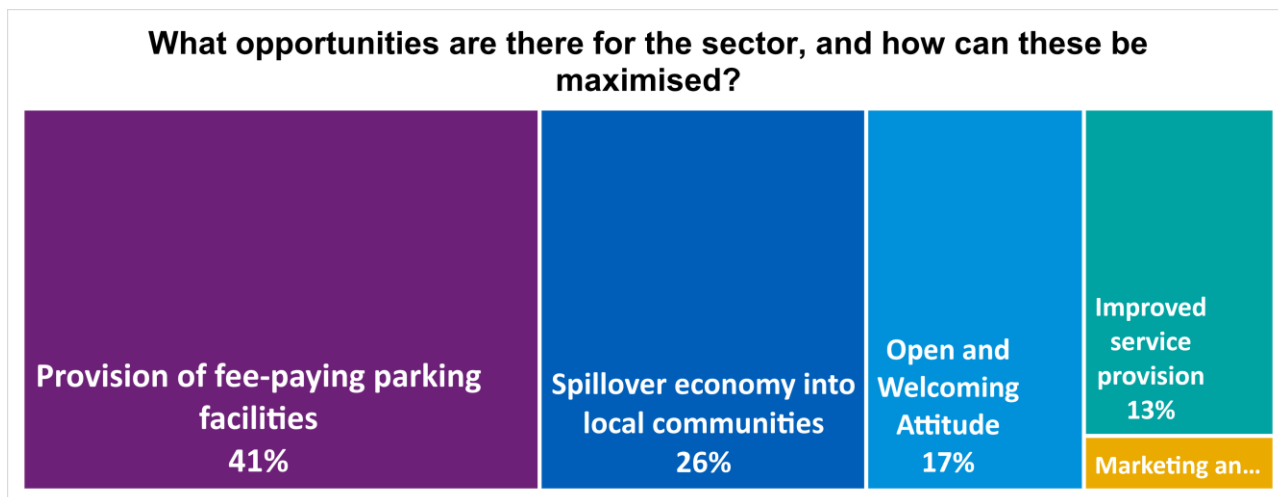


Figure 36: Opportunities for the caravan, camper van, and camping sector

Due to the qualitative nature of responses to Question 13, responses were categorised by theme and taken as a percentage of all responses. While the responses were categorised under the five themes in Figure 35 (above), Many responses contain a combination of the themes outlined above.

Provision of fee-paying parking facilities: Most respondents outline how more overnight parking for a small fee (€15 max) would benefit the motorhome community in Donegal.

Spillover economy into local communities: By providing more facilities and services for campervan and motorhome users, respondents believe this will increase the economic benefits the sector and visitors will provide for local communities and other businesses.

Open and Welcoming Attitude: The attitudes of locals and service providers towards visitors was outlined as a significant opportunity for the sector. Being made to feel welcome and safe was often indicated by respondents as the most important factor towards choosing a location to visit.

Improved Service Provision: services that are frequently highlighted by respondents include those such as toilets, waste services (segregated bins; recycling, general, compost etc.). This is outlined as the second most common issue/challenge experienced by respondents.

Marketing and Advertising: Work with motorhome groups such as Motorhome Craic, Total Motorhome Ireland and Irish Motorhome Group and campsites owners to gain insights from forums, blog pages, trip reviews on how best to promote the current and future offerings for motorhome users and campers potentially visiting Donegal.

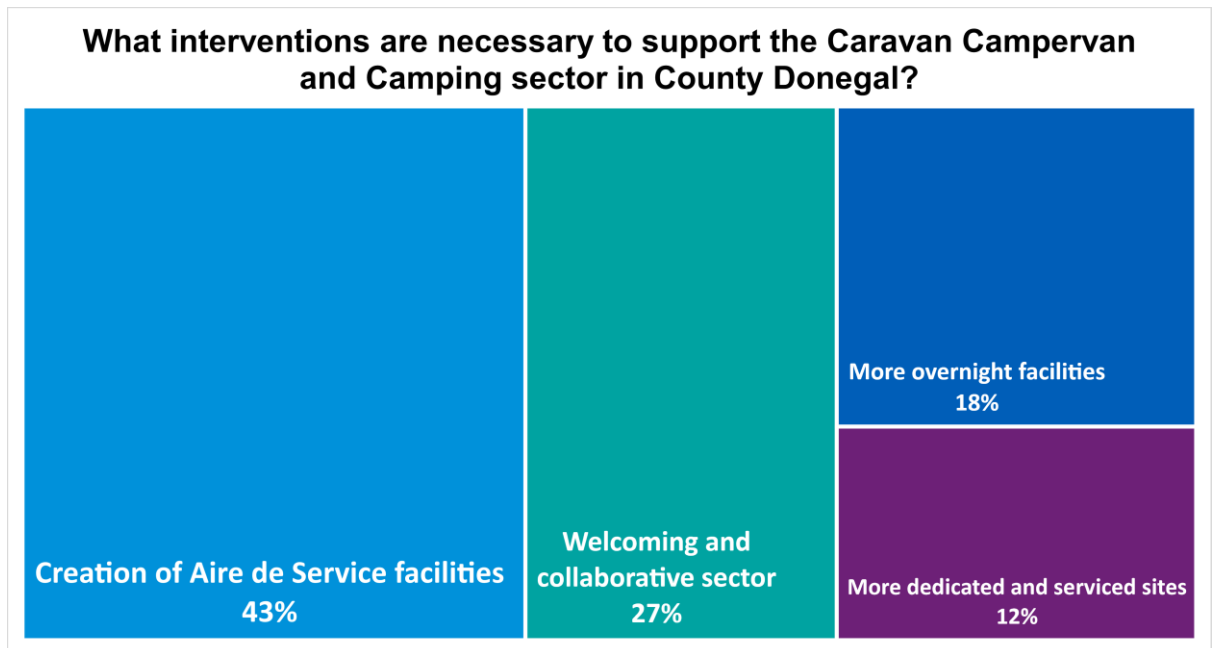


Figure 37: How the sector can be supported

Creation of Aire de Service facilities: The provision for more Aire de Service sites to be developed by both the local authority and private parties appeared in 43% of respondents' answers.

Welcoming and collaborative sector: Consultation with campers, camper and motorhome/caravan groups/associations and campsite owners to both build positive relationships between all interest groups and collaborate to produce sustainable solutions to current and future issues within the sector.

More overnight facilities: While also providing more parking provision, many respondents outlined a need for more overnight parking facilities, particularly for motorhome users who have serviced vehicles and are not willing to pay fees to stay at serviced campsites.

More dedicated and serviced sites: The availability of services such as waste disposal, fresh water, toilets and showers and electrical hook-up was outlined as a potential intervention by many respondents, as many visitors who are campers or campervan users do not have many of these services installed into their vehicles.

Summary

Key Points

1. A Greater Need for Parking

- The provision of more parking facilities was outlined across the surveys as a major priority in the campervan and motorhome sector in Donegal
- The affordability and availability of overnight parking is seen as key to any new or improved parking facilities
- Strategic location of parking proximate to towns or villages was the prevailing preference for parking location within survey responses
- Safe, off-road parking was seen as a greater influencing factor for visits over other factors such as toilets and showers, waste disposal, fresh water and electrical hook-up

2. Fostering a Positive and Welcoming Attitude

- Experiencing unwelcoming and anti-social behaviour was the most prevailing influencing factor behind visits by campervan and motorhome users, alongside the availability of safe, allocated parking
- Both campsite operators, the public and campervan and motorhome users outlined creating a more open and welcoming attitude was paramount to the future of the sector in Donegal
- Several areas were identified as areas which experienced high levels of issues for both the public and for campervan and motorhome users

3. The Value of Donegal's Natural Heritage and Culture

- The pedigree and volume of Donegal's' natural and cultural heritage is outlined as a huge pull factor for visits by campervan and motorhome users – with many taking part in outdoor recreation and pursuits
- Many respondents visit all parts of Donegal due to the variety and quality of natural amenities and attractions available and accessible to visitors and the public alike
- The use of social media and other digital mediums for digital motorhome and campervan forums and tourism promotion has influenced Donegal's appeal to a wide demographic of visitors

Key Opportunities

1. Safe, Allocated Parking

- Providing safe, allocated parking which is off-road
- Strategic location of parking at both sites of interest and proximate to town and village centres to appeal to a wider demographic of campervan and motorhome users
- Affordable and flexible parking arrangements – the use of existing parking at restaurants, pubs and sports clubs for campervan and motorhome users on a seasonal basis to accommodate demand
- Work with current and potential campsite operators to encourage appropriate development of new facilities

2. Building Strong Relationships

- Increase dialogue and consultation with campervan and motorhome users through social media groups, camping and caravan associations
- Ongoing consultation with local representatives and business owners to establish a framework for future parking and camping developments which is in the best interest of locals and the public
- Reduce barriers and restrictions in tandem with improvement to parking provisions
- Use of social media and digital mediums to increase the promotion of Donegal as an open and welcoming county to visit – both regionally, nationally and internationally

3. Protecting the Integrity of Natural Heritage and Culture

- Provide better facilities at existing camping and parking sites for waste disposal and fresh water
- Provide improved facilities at local attractions to reduce the negative impacts of increased visitor numbers on nature capital and biodiversity
- Utilise existing brownfield or partially-serviced sites such as existing car parks for the development of new parking and camping provisions – particularly within towns and villages

5.1.2 One to One Interviews Emerging SWOT Analysis

Emerging Strengths

- Donegal is one of Ireland's **most scenic counties** attracting photographers, backpackers, campers and road trippers alike.
- The rugged wildness of Donegal puts it on the map as the beginning or the end of the famous tourist experience '**The Wild Atlantic Way**'.
- Donegal has an **established camping sector**, that can be built upon. There is a long-standing history of camping parks and withhold a reputation in the industry.

Emerging Weaknesses

- **Infrastructure:** Facilities for camping, caravans and camper vans are lacking near towns and popular tourist spots, not only in Donegal but across the nation. The county is lacking a variety of infrastructure available (holiday parks, Aire De Service, parking for 'pit stop' (i.e. 1 night), and a range of options spanning luxury, glamping style holidays to more budget friendly options. There is a lack of pedestrian routes connecting some holiday parks/motorhome parking areas to town centres, and those already in place require upgrading in many cases.
- **Coordination and Cooperation** between holiday parks and of private businesses (e.g pubs / restaurants) or community facilities (e.g GAA clubs) offering short term camper van/motorhome parking. A clear vision for the role of these alternative 'stopover' points is needed (e.g are they strictly for overspill in areas currently underserved by dedicated caravan / camping parks?)
- **Marketing and Promotion:** Targeting the appropriate visitor markets, promotion of Camping Parks in Donegal.

Emerging Opportunities

- Donegal has the opportunity to reap a superior **economic benefit** from tourism subject to catering to the camping and camper van tourist by providing them with the appropriate infrastructure and facilities (safe spots for camping and motorhome parking, pathways connecting designated spots to town centres).
- **Increased visitor numbers** and give Donegal tourism a **competitive advantage** as one of the first counties in Ireland to have an official representation of this visitor, actively adapting their tourism offering to welcome this tourist type.

Emerging Threats

- **A lack of appropriate amenities: signage** at sensitive spots indicating it is **not permitted** to park a camper van and signage directing to spots where it **is**

permitted to park camper vans. Lack of disposal facilities causing visitors to dispose waste into unequipped facilities (storm drains, public toilets, etc.).

- **Parking in undesignated areas:** parking on public roads of insufficient width to accommodate parking, usually near tourist amenities, attractions. Illegal parking raises the issue of obstructing road passage and car parking for others. Areas where this occurs should be recorded and marked with the appropriate signage.
- **Parking at beauty spots:** Beaches, hotspot car parks, beach dunes and piers have all been subject to over tourism, and illegal camping and parking. This has been reported to deter the non-camping and camper van tourist and obscure the famous landscapes.
- The **affordability of hotels, glamping pods** and quirky Airbnb's makes caravans / mobile homes seem **less attractive**.
- Existing and Future **Aire De Services** would require continuous **investment and maintenance** to continue attracting the spending tourist.
- A **Lack of legislation** i.e. byelaws in place that call upon gardai enforcement, such as spot fines.
- **Illegitimate camping and camper van spots** are widely communicated via **online platforms**. These sources are highly used by visitors looking for a place to wild camp or park their motorhome / camper van. It is probable that without official intervention and an official council or tourism board platform online to inform and direct visitors, this will continue.

6 Economic Value

The estimated value of campervan and camping to the economy of County Donegal can be estimated in several different ways. For the purposes of this study estimates are based on total number of units and average fees per campsite i.e. site fees; and the secondly an estimate of average spend per visitor based on data from Failte Ireland i.e. total spend. The former can be taken as an indication of indicative revenue for site owners; the latter as an indicative estimate of total value to the economy of County Donegal.

Based on Average Site Fees

There are 20 campsites with a total of 394 campervan/touring caravan spaces. An average is taken of the fees charged for each across the 20 campsites. Most campsites are open from May to October (180 days), with an average of 70% occupancy (data provided from the online survey). This gives a total estimated conservative annual revenue from site rental of approximately €1,817,197. This figure excludes additional fees charged at campsites and additional value-added revenue on site, as such it is a conservative estimate of site related expenditure.

Table 3 Indicative value of campervan, touring caravan and tent related site rental fees

	Number of sites	Average fee (€)	Total estimated fee/night (€)	X Period open (most are May to Oct i.e. 180 days)	X Average Occupancy of 70% (€)
Campervans/caravans	394	28.8	11,347	2,042,496	1,429,747
Tents	201	15.3	3,075	553,500	387,450
Total					1,817,197

Indirect and Induced Benefit

Using an accepted multiplier of 1.5 it can be estimated that the indirect and induced benefits of visitor expenditure on campervan/touring caravan and tents to the regional economy is worth €2,725,796.

Total economic Impact

Combining the indicative direct visitor revenue and the indirect and induced benefits gives a figure of €4.5m as a value of total economic impact from expenditure related to this sector within the County Donegal area based on site rental.

Based on Visitor Numbers

An alternative estimate can be based upon the number of people coming to Donegal using these forms of accommodation. This estimate is based on an average of two people per campervan, caravan, or tent. Failte Ireland estimate Overseas holidaymaker daily spend at €96/day and domestic holiday maker spend at €74/day for overnight trips.¹⁵ For the purposes of this estimate a conservative approach is taken utilising the domestic daily figure.

Table 4 Indicative value of campervan, touring caravan, and tent related expenditure to County Donegal

	Number of sites	Number of people (2 per site)	Number of person days (x 180)	Average domestic spend / visitor (€)	Total (€)	X Average Occupancy of 70% (€)
Campervans/caravans	394	788	141,840	74	10,496,160	7,347,312
Tents	201	402	72,360	74	5,354,640	3,748,248
Total					15,051,600	

Failte Ireland estimate revenue for the Border Region, which includes Donegal, Leitrim, Roscommon, Monaghan, and Cavan, as being €348m for All overseas visitors, €152m from Northern Ireland visitors and €200m from domestic visitors. In this context the figure of €11.1m is not considered unrealistic as an estimate of total expenditure from visitors to Donegal who are staying in campervans, touring caravans, and tents.

Based on Failte Ireland data that approximately 27 jobs are generated for each €1m of tourism expenditure, this indicates that 300 jobs are based on this form of tourism in County Donegal. Failte Ireland further indicate that for every euro spend on tourism 23c is generated in tax. This indicates that tourism based on this sector in County Donegal is worth approximately €2.5m to the Irish exchequer annually.

¹⁵ Key Tourism Facts 2019, Failte Ireland 2020

Summary

The following comments can be made with regards to the economic value of campervan, caravan, and tent-based tourism in County Donegal:

- This form of tourism is estimated to generate **€1.8m** in site rental fees annually.
- Combining the indicative indirect visitor revenue and the indirect and induced benefits gives a figure of **€4.5m** as a value of tourism to the County Donegal economy.
- An estimate of expenditure based on daily visitor spend indicates an indicative value of **€11.1m** as an estimate of total expenditure from visitors to Donegal who are staying in campervans, touring caravans, and tents.
- This revenue is estimated to support **300 jobs** in County Donegal from expenditure associated with this form of tourism.
- Expenditure from camping, caravan and tent-based tourism is estimated to be worth **€2.5m** to the Irish exchequer annually.

7 Conclusions and Recommendations

As highlighted throughout this report, the CCC sector in Ireland and across Donegal has continued to evolve over time. Camping has developed from its roots as a more basic form of outdoor accommodation (comprising primarily of tenting) to a more modern accommodation option ranging from tent camping and ‘glamping’ options to campervans and caravanning. It is also often more than just an accommodation option and is now, in many cases, also part of a larger visitor experience with sites offering additional services, facilities and attractions. The ‘types’ of camper or visitor have also evolved, and their needs, preferences and budgets are far from homogenous.

In parallel to these trends, the context for travel and tourism has shifted dramatically since early 2020 with the onset of the COVID-19 crisis. There has been a growing emphasis on ‘staycations’ and an accelerated demand for campervans across much of Europe. Forbes, reflecting on these trends, has referred to camping as “perhaps the ultimate form of socially distant travel and recreation” with the Irish Times citing camping as the number one “travel trend to watch in 2021”. Overall, Fáilte Ireland have reported that self-catering and caravan parks have ‘fared much better’ than serviced accommodation this summer due to the relatively self-contained nature of both, with 74% of available self-catering and 62% of caravan capacity for August 2021 booked up in contrast to 40% for hotels, 24% for guesthouses and 20% for B&Bs.

Greater overall levels of domestic travel in Ireland over the past eighteen months has provided a much-needed boost to help sustain many tourism destinations and businesses. However, this has not been without its challenges. Indeed, many counties reported overcrowding and heavy traffic at beauty spots across Ireland over the course of summer 2020. Indeed, this was a key item of feedback from communities in Donegal over the course of the consultation period for this project. Many highlighted ongoing difficulties with heavy traffic and unsafe parking practices by tourists during peak season.

The CCC sector has to a large extent developed in an organic fashion in Donegal with the majority of service providers being private sector, with a small number of local Aire de Service locations provided by Donegal County Council. The majority of existing sites are located in close proximity to the coast and the Wild Atlantic Way route. Data from Fáilte Ireland shows that of all registered overseas visitors along the Wild Atlantic Way, 8% stayed in Caravan and Camping accommodation in 2019.

The emphasis on ‘staycations’ over the last 18 months has arguably accelerated shifting trends within the CCC sector more generally. Service providers must now often deal with the new and shifting demands of their customers, who wish to have more comfortable and luxurious options (in line with the ‘glamping’ trend). Indeed, Total Camping Ireland reported that ‘glamping’ has been a top search item over the past year. The profile of a ‘typical’ camper is also changing. In a broad sense, different ‘types’ of campers can often be distinguished according to the length of stay at the camping ground or motivation for camping. While some campers will seek out luxurious and private stays (often shorter term trips), others will be seeking a more social trip where families can meet and interact (often characterised by longer term trips). Thus, the needs, preferences and budgets of

visitors are far from homogenous and strategies for promoting the development of the CCC sector must recognise and acknowledge this.

The CCC sector is an important strand of County Donegal's tourism infrastructure. As noted in the Donegal Tourism Strategy 2017-2020, Donegal communities have seen many changes in the past decade including economic depression, mass emigration and unemployment. Some of these challenges have been further sharpened by the COVID-19 crisis. However, there is also significant opportunity to build on more recent boosts to the domestic tourism sector and ensure that CCC tourism is strategically planned for in a manner which can contribute positively to local economies while mitigating against any potential negative impacts.

Based on the findings of the various stages of research, a number of core thematic recommendations have been developed, as follows:

7.1 Facilitating and Enabling Camping in Donegal

This study has highlighted a growing trend and interest in 'wild camping' from campervan users. While 'wild camping' has traditionally been associated with pitching tents in areas not designated for camping (i.e. a campsite), this is a trend now increasingly seen with campervan / motorhome users – necessitating many countries and cities to acknowledge and plan for this within their tourism strategies. Indeed, New Zealand, through the introduction of the Freedom Camping Act in 2011 has now recognised what they term 'freedom camping', and 'freedom campers', as a legitimate and valued segment within their broader tourism portfolio.

'Wild camping' or 'freedom camping' is often described as an 'underserved' strand of tourism as it is typically not strategically planned for or managed. While it may seem like an unusual approach to 'manage' an aspect of tourism that is pursued by visitors for its freedom and flexibility, some level of strategic planning is required to ensure positive experiences for both visitors and local communities/ businesses. Wild camping can often be a point of contention for local communities and landowners. This summer, the Irish Examiner reported on bonfires and littering associated with wild camping across East Cork (including protected sections of land that fall under the remit of the National Parks and Wildlife Service)¹⁶. The findings of this study also highlight issues with anti-social behaviour, littering, and unsafe parking practices by campers and campervan users across areas of Donegal.

To address some of these issues, interventions such as 'no camping' signage and height barriers have been installed in some locations across Donegal. In some instances, local communities have heralded these interventions as successful in mitigating against some of the more serious issues previously experienced. However, different communities have different preferences for the types of tools used to tackle inappropriate or unsafe parking practices. Some felt that height barriers detract from highly scenic areas and did not want them installed as a result. As such, a 'one size fits all' approach is deemed to be inappropriate. Rather, a balanced approach combining 'push' (discouraging parking

¹⁶ <https://www.irishexaminer.com/news/munster/arid-40303691.html>

through preventative or restrictive measures such as signage or physical infrastructure) and ‘pull’ factors (comprising measures to encourage and guide parking in appropriate locations and in an appropriate manner) is preferred.

While motorhome clubs and websites encourage their members to follow wild camping etiquette and ‘leave no trace’, such messaging and principles must also form a core part of Local Authority tourism strategies and plans. Indeed, as part of this study a key recommendation arising out of the stakeholder engagement exercises was the development of a dedicated ‘Code of Conduct’ to guide the CCC sector. Such an exercise has also been undertaken by Cumbria Tourism as part of their suite of new resources (discussed above and in Section 4.5). They have developed “The Motor Caravanners’ Code” which aims to help the motorhome community enjoy the county’s scenic highlights without compromising its sensitive landscape. It includes advice such as planning routes which avoid narrow rural roads, seeking out approved parking locations and leaving ‘no trace’ in the local environment by taking litter home and not lighting fires outdoors. Copies of the new Motor Caravanners’ Code are shown, in poster form, in a selection of petrol stations, service stations and supermarkets that visitors are likely to use as they enter the county. These can be seen alongside a facilities map to help people who may be unfamiliar with the area to easily identify basic facilities like public toilets and free black and grey waste disposal sites around the county. QR codes also direct them to more online information. However, it is also considered that any code of conduct must be in alignment with a strategic approach adopted for the Wild Atlantic Way as whole – promoted for example by Failte Ireland.

In addition, the need for a ‘blended model’ for campervan parking was also discussed by stakeholders over the course of this study. Indeed, many campervan users state that provisions and services do not always need to be based around a traditional, overnight model. Indeed, a combination of transient facilities (i.e. water, waste disposal etc) and dedicated campsites was the preferred approach for most visitors. The features of both were considered essential. While campsites provide for enhanced services and opportunities for social interaction (typically targeted at a 2+ night stay, for example), transient facilities support and enable wild camping (sometimes a feature of trips between two campsites, for example). It was also suggested that these transient facilities could take the form of Air de Services run by campsites themselves. Existing Air de Service locations, run by the Local Authority, could also be taken into charge by private service operators in the County, subject to further detailed engagement with relevant stakeholders.

It was also remarked over the course of the study that campervan users often do not know where they can park when not in a dedicated campsite. Some survey respondents also highlight how prohibited camping signage does not always indicate alternative sites/locations for campervans or campers to locate to. Many of the social media groups operated by campervan users thus promote locations where they have been ‘wild camping’ previously – and where there is no restrictive infrastructure in place (e.g. height barriers). It is recommended that further Local Authority derived guides to the county be developed to supplement or further structure the ‘unofficial’ marketing of locations. This could include further information on the county – including appropriate and dangerous routes for campervans (e.g. Roads with bends, gradients or restricted width which require additional consideration and caution); locations where transient facilities are

available; recycling points across the county; areas where wild camping is not permitted in any circumstances; and areas where wild camping may be permitted on a seasonal basis. A similar 'Caravanners County Map' was produced by Cumbria Tourism.

Recommended Actions

1 Educate: Develop a CCC 'Code of Conduct' to guide and structure camping and campervan tourism across the county. This should be launched in conjunction with the marketing resources described in Section 7.1. It is important that the messaging is communicated and presented in a positive way, like that for Cumbria Tourism to include but not limited to *valuing, supporting and contributing to our local communities*. It is also important to liaise with Fáilte Ireland with regards to adopting Code of Conduct at a regional level, ensuring a consistent approach across the Wild Atlantic Way, a main touring route for campervans. There is an opportunity for County Donegal to be positioned as a destination of best practice in this regard.

2 Inform: The development of a CCC County Map to guide wild camping across the county. As above, this could include further information on appropriate and dangerous routes for campervans (e.g. Roads with bends, gradients or restricted width which require additional consideration and caution); locations where transient facilities are available; recycling points across the county to raise awareness of water collection and recycling facilities in Donegal; areas where wild camping is not permitted in any circumstances; and areas where wild camping may be permitted on a seasonal basis. The narrative should include pre and advanced warning to identify restrictive access.

3 Dissuade: Install signage in locations where wild camping is prohibited (for example, at beaches and piers) with the development and inclusion of a QR code advising of updated alternative camping facilities information for visitors. This should also include signage in towns and villages to ensure all visitors are informed of alternative caravan, campervan and camping arrangements throughout the county.

4 Enforce: Consider where byelaws are required, for example, in areas where a high level of continuous issues have been reported and recorded and this is approach is considered justified and enforceable.

5 Support the development of a blended approach to the provision of campervan or facilities across the county which accommodates the traditional overnight model and which also enables the use of transient facilities for a fee (for those campervan users who wish to avail of services for a short period of time but who do not necessarily wish to remain at a particular site overnight).

6 Monitor ongoing trends relating to the further development and evolution of the CCC sector. This should involve annual reviews of current capacity across existing campsites (through an annual survey for example which feeds into the updating of the CCC accommodation map – see Section 7.2)

7.2 A Strategic Approach to Marketing the CCC Sector

Over the course of the stakeholder engagement period, many survey respondents outlined what they deemed to be ‘negative perceptions’ of some campervan and camping visitors among local communities due to the nature of ‘unregulated’ camping in the county. Respondents highlighted how the lack of current wild camping provisions in Donegal has led to issues surrounding unauthorised wild camping on private land, for example. Similarly, during peak seasons, heavy traffic and dangerous parking patterns by campervan users have been observed.

Interestingly, respondents to the campervan user survey indicated that the attitudes of locals and service providers towards visitors was a significant influencing factor towards selecting potential locations to visit. Being made to feel welcome and safe was often indicated by respondents as the most important factor towards choosing a location to visit, often trumping other factors such as amenity/facility provision, affordability and availability. Yet, at the same time, some campervan users reported feeling ‘unwelcome’ in certain locations due to restrictive infrastructure such as height barriers.

These are issues which are often reported across cities and towns popular with tourists in Ireland and across Europe. Indeed, as reported in Section 4.5, Cumbria Tourism (in the UK) have developed a range of new resources since the onset of the COVID-19 crisis to address to what it deemed to be a ‘rapid rise in motorhome ownership over the past 12 months’. Visitors can access these before they arrive at: www.visitlakedistrict.com/vanlife. This helpful online hub includes downloadable maps, as well as practical hints to help people easily identify approved locations to stay and basic facilities like public toilets and waste disposal.

One of these maps, as shown in Section 4.5, is a ‘motor caravanners accommodation map’ which displays accommodation options across the county, including indicative pricing; seasonal opening arrangements; whether a one night stay is permissible and information on routes to and from campsites and towns (e.g whether they are ‘passable with care’ in a motorhome or whether they might only be ‘only recommended for accessing overnight locations’.)

A similar approach has been taken in the Algarve region of Portugal. As highlighted in Section 4.5, “The Algarve Motorhome Support Network”. The project was the fruit of a cooperation agreement between the Algarve Regional Development and Coordination Commission, the Algarve inter-municipal Community and the Algarve tourism boards and associations to collaborate with Camping and Caravan Sites, Rural Camping parks, and Motorhome Service Areas. The goal was to promote legal spots for overnight stopovers for the camper van tourist, to refill and dispose of waste. In addition, the Algarve Motorhome support network distributed leaflets to motorhome visitors, directing them to facilitated Aires and camping parks. The initiative to inform these visitors via the online platform and leaflets was to stop illegal stopovers by creating quality and safe spaces that motorhome tourists demand and communicate these places effectively.

<https://algarvemotorhomepark.com/en/>

These measures represent interventions which may be described as ‘pull factors’, drawing and guiding campervan users across the county in a manner which is welcoming and proactive, while simultaneously guiding visitors away from more inappropriate parking locations. When ‘push’ factors such as prohibitive infrastructure (including ‘no camping’ signage and height barriers, for example) are used in isolation it can stimulate an ‘unwelcome’ atmosphere for visitors. Rather, a more proactive, collaborative and strategic approach to marketing the sector – through the use of online and mapping resources – can aid in sustainably growing the sector while mitigating against potential negative impacts.

Recommended Actions

7 The development of dedicated ‘Caravan, Campervan and Camping’ webpage on the ‘Go Visit Donegal’ website, building on and further enhancing the information currently available on the site – which is currently focused on caravan and camping. This would also involve updating the existing URL to encompass campervans. A sample of this is as follows: <https://www.govisitdonegal.com/accommodation/caravan-campervan-and-camping>

8 The development of a ‘motor caravanners accommodation map’ which is displayed and hosted on the ‘Go Visit Donegal’ website. Currently, only nine campsites are listed on the ‘go visit’ Donegal’ website, which is not representative of the County-wide offer.

9 Further engagement with service providers across the county in developing a strategic marketing approach including in the development of enhanced print and digital mapping resources, and engagement with touring websites owners.

7.3 Boosting Local Economies

One of the key discussion points raised across the various stakeholder engagement exercises was the role the CCC sector plays in local economies across Donegal. Harnessing the financial benefits of increasing campervan tourism was a key priority area. However, there was some debate as to the extent such tourism boosts local revenue with some survey respondents and interviewees pointing to the self-contained nature of such travel and the ability of visitors to bring food and supplies with them from home. This point was widely dismissed by many campervan users who indicated that they simply do not have enough space in the average campervan to bring extensive supplies. Moreover, visiting local restaurants and pubs was deemed to be a key attraction for many visitors. The findings of the campervan user survey suggest that 41% of visitors spend more than €60 locally per day and 74% spend between 2-3 nights in one location.

However, exploring the potential to further build on these benefits was a key strand of discussion for many stakeholders. It was suggested by some interviewees that touring campervans provide a means of attracting visitors into smaller towns and villages where there are perhaps less accommodation options otherwise (e.g. hotels; guesthouses etc). In addition, many survey responses outlined how campervans and campers would be more welcomed in towns if appropriate facilities were provided for. This was outlined by respondents to be beneficial in both reducing the need for enforcement / negative ‘push’

factors while increasing the social and financial benefits of appropriate facilities. Paid facilities could increase revenue for local economies and increase return business if facilities are of a high standard and would prevent the need for more regulation / enforcement due to inappropriate parking.

This could include the seasonal use of a number of car parking spaces not typically earmarked for campervans, facilitated through an app-based system for example. It is noted that Donegal are currently exploring options related to app-based payments for car-parking more generally.

It is noted that over the course of the COVID-19 crisis some local businesses (including pubs; restaurants etc) have provided a portion of their carparking spaces for overnight campervan use. This has sometimes been in exchange for the purchase of food or drink at the premises or in some cases a separate charge has been arranged. Within the context of the current crisis, this has afforded many businesses heavily impacted by reduced tourist numbers and ongoing closures an additional revenue stream. In addition, these stop over points are viewed as particularly important in areas currently underserved by dedicated camping or campervan parks (and thus helping to mitigate against more inappropriate parking practices).

Existing 'stopover points' are often plotted on a map by campervan users and posted to social media groups (often with thousands of members). This is certainly a useful means of boosting local economies during a difficult period but the sustainability of a longer-term approach to these arrangements has been queried by some stakeholders – particularly when an overnight model is utilised (as opposed to the provision of transient facilities). As highlighted by the stakeholder engagement process, existing campsites are subject to a variety of planning conditions related to fire safety; traffic etc. This ensures that they can operate in a manner that is safe for both visitors and local communities.

Where overnight ('wild camping') parking options are provided in non-designated campsites, further regulation is recommended in the context of a post COVID scenario. This should, for example, seek to ensure limited provision of these 'stopover points' in areas currently underserved by campsites or other accommodation options. In such instances where other accommodation options are lacking, it is considered that Donegal County Council could seek to support (through a grant, for example) the development of a limited number of stopover points which utilise a portion of car parking spaces of existing businesses or community centres. In order to provide some further structure to these practices, Failte Ireland recommend that such businesses apply for their 'Welcome Standard' and indeed this could be a prerequisite for any formal support from Donegal County Council). Such 'stop over' points could then be mapped as part of a suite of new online resources seeking to guide and structure wild camping across the county.

Moreover, it is also recommended that future planning permission for proposed campsites should be generally restricted to areas within walking distance of a town or village. It is also noted that a previous condition of planning permission for campsites was the development of a linking pathway between sites and town / village centres – ensuring that connectivity was maintained and to encourage further visits between locations.

Recommended Actions

10 Supply: Review current system of provision of Aire De Service sites with the objective of leasing existing sites to private operators (ideally existing campsites) on a tender basis for a fixed term.

11 Explore the potential of incentivising local community-based groups and local businesses to provide a limited number of dedicated campervan, caravan and motorhome parking and amenity facilities in areas currently underserved by accommodation in Donegal. The utilisation of private business carparking spaces for overnight campervan use can be a much-needed boost for local businesses during this difficult COVID-19 period. However, such an approach requires further strategic planning. Indeed, it is imperative that these locations do not pose a fire or health and safety risk to the general public or to campervan users themselves. Further regulation could, for example, seek to ensure limited provision of these 'stopover points' in areas currently underserved by campsites or other accommodation options. These must also be subject to inspection by the Council. Further engagement with existing campsites might explore if such 'unofficial' stopping points might serve as 'overspill' options when parks are at maximum capacity – which would also serve to mitigate against unsafe parking practices during higher demand periods (as service providers can recommend alternative options). Where incentives (e.g a grant) are offered to such businesses for these more informal stopover points, comparative options should be offered to existing, dedicated camping and campervan parks (e.g for the development of transient services, for example).

12 Support emerging transient facilities that wish to provide touring campervan facilities on appropriate sites in towns and villages by funding registration fees for Failte Ireland's Welcome Standard. Grant supports for development of such infrastructure could be linked to the attainment of the Welcome Standard.

13 Facilitating links between existing settlements and planned campsites: As detailed above, it is recommended that future planning permission for proposed campsites should be generally restricted to areas within walking distance of a town or village. It is also noted that a previous condition of planning permission for campsites was the development of a linking pathway between sites and town / village centres. It is recommended that such a condition be re-introduced going forward.

14 Incorporate designated overnight transient sites and facilities for campervans into the existing suite of conditions for planning permission grants within local authority planning policy on the development of both new and existing tourist facilities such as caravan, campervan and campsites.

7.4 Policy Recommendations

Policy Recommendation 1 – for new sites

TOU-P-XX: It is Council policy to consider development proposals for the provision of exclusively touring caravans, campervan/motorhome and camping stopover sites at locations along and in close proximity to the designated 'Wild Atlantic Way' route, excluding areas of Especially High Scenic Amenity, which comply with the following criteria:

- There is provision of suitably designed and surface parking bays with **water and power** facilities, green space for each vehicle/touring caravan and wastewater disposal facilities.
- Sites are located within existing settlements where there is existing infrastructure provision to service the development and where they can contribute to maintenance of essential rural services and the local economy, unless it is proposed to reuse an existing structure outside a settlement and in such cases where it can be demonstrated that the development will not have significant adverse effects on the environment, including the integrity of the Natura 2000 network, residential amenity or visual amenity.
- The specific criteria set out in the Tourism Development General Criteria Policy (TOU-P-20 refers).

Policy Recommendations for extensions to existing sites

TOU-P-XX: It is a policy of the Council to consider development proposals for extensions to existing parks for mobiles homes/static caravans in rural areas excluding areas of Especially High Scenic Amenity where they comply with the following criteria:

- The specific criteria set out in the Tourism Developments General Criteria Policy (TOU-P-20 refers).
- New facilities are only for use by touring caravans, campervans, motorhomes and camping,
- The location siting and design of the development generally accords with the Caravan and Camping Parks Registration and Renewal of Registration Regulations, 2009 or any subsequent related regulations.

And

TOU-P-XX: It is a policy of the Council to consider development proposals for extensions to existing parks for mobiles homes/static caravans in urban areas where they comply with the following criteria:

- The specific criteria set out in the Tourism Developments General Criteria Policy (TOU-P-20 refers).
- New facilities are only for use by touring caravans, campervans, motorhomes and camping,
- The location siting and design of the development generally accords with the Caravan and Camping Parks Registration and Renewal of Registration Regulations, 2009 or any subsequent related regulations.

8 Implementation Pathway

The below sets out an implementation pathway for the key recommendations, indicating whether these items are of a short (within 1 year); medium (within 2 years) or longer (within 5 years) term nature and any associated actions to be pursued.

Theme	Recommendation	Timeline	Associated Actions / Points of Reference	Lead Agency	Partners
7.1 Facilitating and Enabling Camping in Donegal	1 Educate: Develop a CCC 'Code of Conduct' to guide and structure camping and campervan tourism across the county	Medium	DCC to liaise with Failte Ireland on a strategic approach to the WAW which will inform localised and standardised codes of conducts to be produced	DCC	Failte Ireland
	2 Inform: The development of a CCC County Map	Short	The development of this map (based on the model adopted by Cumbria Tourism) will necessitate input from various departments in DCC including	DCC	N/A
	3 Dissuade: Install signage in locations where wild camping is prohibited	Short	The provision of this signage should be developed in parallel with the development and inclusion of a QR code advising of updated alternative camping facilities information for visitors. As such, this task is highly intertwined with actions	DCC	N/A

			associated with recommendation 8.		
	4 Enforce: Consider where byelaws are required (in locations where other mechanisms have not been successful to date)	Ongoing	By laws can be considered in areas experiencing acute difficulties where other mechanisms have not been successful.	DCC	N/A
	5 Support the development of a blended approach to the provision of campervan or facilities across the county which accommodates the traditional overnight model and which also enables the use of transient facilities	Medium	This action should be pursued in tandem with recommendations 11 and 12.	DCC	N/A
	6 Monitor ongoing trends relating to the further development and evolution of the CCC sector	Ongoing	This activity, which could be pursued through an annual online survey, is critical in determining the longer-term capacity of the sector and also enables more strategic marketing and 'channelling' of visitors to appropriate locations. As such, it is highly linked to recommendation 8.	DCC	Service providers

7.2 A Strategic Approach to Marketing the CCC Sector	7 The development of dedicated ‘Caravan, Campervan and Camping’ webpage on the ‘Go Visit Donegal’ website	Short	This should be actioned in parallel with recommendations 6 and 8.	DCC	Service providers
	8 The development of a ‘motor caravanners accommodation’ map	Short	This necessitates engagement with service providers across the county. Please see recommendation 9 below.	DCC	Service providers
	9 Further engagement with service providers across the county	Ongoing	Annual engagement with the CCC sector should be undertaken to realise the objectives tied to a number of these recommendations (specifically recommendation 6,7 and 8). This could be in the form of an online survey. Featuring on official marketing material (e.g. the accommodation map) should be the incentive for service providers to participate.	DCC	Service providers
7.3 Boosting Local Economies	10 Supply: Review current system of provision of Aire De Service sites	Short-Medium	The current system of management and maintenance of existing Aire de Locations is relatively fragmented. This system could be reviewed with the objective of leasing existing sites to private operators (ideally	DCC	Service providers

		existing campsites) on a tender basis for a fixed term.			
	11 Explore the potential of incentivising local community-based groups and local businesses to provide dedicated campervan, caravan and motorhome parking and amenity facilities in Donegal in areas currently underserved by dedicated camping and campervan parks	Short	The identification of areas currently underserved by existing accommodation options will be aided through the development of the accommodation map (recommendation 8). The exploration of incentivisation options may be linked to recommendation 12.	DCC	Private businesses and community groups
	12. Support emerging transient facilities that wish to provide touring campervan facilities on appropriate sites in towns and villages by funding registration fees for Failte Ireland's Welcome Standard	Short - Medium	Incentives for local community-based groups and local businesses could include grants – for example, to attain the Failte Ireland 'Welcome Standard'.	DCC	Failte Ireland; Private businesses and community groups
	13 Facilitating links between existing settlements and planned campsites:	Short	It is recommended that future planning permission for proposed campsites should be generally restricted to areas within walking distance of a town or village. This should be reflected in planning policy contained within the forthcoming Development Plan.	DCC	N/A

	14 Incorporate designated overnight transient sites and facilities for campervans into the existing suite of conditions for planning permission grants	Short	Further roll-out of transient facilities is required . This should be accommodated in dedicated campsites for a fee and incorporated into the existing suite of conditions for planning permission grants for new developments.	DCC	N/A
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A Appendix 1: Market Rates in County Donegal and along the Wild Atlantic Way

*Price for electricity sold separately when stated

Location	Name & Accommodation Type	Pricing Structure
Rossnowlagh, County Donegal	Boortree Touring and Camping Pitches: touring vans	€21/ night for 2 Adults (pitch)
Creelough, County Donegal	Wild Atlantic Camp Pitches: tents/touring vans; Glamping: villas/pods/bell tents	€25/ night for 2 Adults (pitch); €65-€70/ night (pods); €99-€150/ night (villas); €40/ night (bell tents)
Killybegs, County Donegal	Killybegs Holiday park Pitches: tents, touring vans	
Binion Bay, County Donegal	Binion Bay Caravan & Camping	€30/ night (pitch)
Rosbeg, County Donegal	Tramore Beach Caravan and Camping Pitches: touring vans; Green area: tents	
Letterkenny, County Donegal	Rosguill Holiday Park Pitches: tents, touring vans	€25/ night (motorhome, caravan, family tent); €10-€20/ night small tent
Meenaleck, County Donegal	Sleepy Hallows Campsite Pitches: tents, touring vans; Glamping: hut, cabin, bell tent	€12/ night (single tent) - €35/ night (7-person tent); €70/ night (cabin); €30/night (hut); €24/ night

		(camper van); 427/night (caravan)
Ballyshannon, County Donegal	Lakeside Caravan and Camping Park Pitches: tents, touring vans	€26-€32/ night (caravan, camper van); €12- €30/night (tent)
Portnoo, County Donegal	Boyles Caravan Camping and Touring Pitches: tents, touring vans	€35/night (pitch)
Quigley's Point, County Donegal	Foyelside Caravan Park Pitches: touring vans	
Portsalon, County Donegal	Knockalla Caravan and Camping	
Kerrykeel, County Donegal	Rockhill Holiday Park Pitches: tents, touring vans	€25/ night (tent); €35/ night (touring van)
Downings, County Donegal	Casey's Caravan and Camping Park Pitches: tents, touring vans	€35/ night (tent); €45/ night (touring van)
Dunfanaghy, County Donegal	Corcreggan Mill Lodge Pitches: touring vans; Glamping: bell tents	€25/ night (touring van) Electricity: €6/ day
Dungloe, County Donegal	Dungloe Touring Caravan Park Pitches: touring vans	€25/ night (pitch) Electricity: €3/ day
Kilcar, County Donegal	Derrylahan Hostel & Campsite	

B Appendix 2: Policy Context

To gain a better understanding of the current caravan, campervan and campsite planning frameworks in place at a regional level, a policy context analysis report has been produced for the following counties along the Wild Atlantic Way and Ireland's South-West Coast:

Co. Donegal

Co. Clare

Co. Sligo

Co. Kerry

Co. Mayo

Co. Cork

Co. Galway

Co. Waterford

This analysis of the existing policy of both Donegal and of other counties on Ireland's West Coast aim to both inform on the current state of planning policy regarding the caravan, campervan and camping industry along the West Coast and to offer insights into future policy recommendations and guidelines which can be implemented in Donegal.

B.1 Donegal County Development Plan 2018 – 2024

The Donegal County Development Plan has established policies and guidelines towards the development of caravan and campsites, both in terms of the location of new or existing developments and the nature of these developments' facilities and services.

The Site Criteria

Several policies and guidelines are outlined regarding the location of new caravan and campsites across Donegal. Similar to other policies seen across the West Coast, these policies and guidelines comprise conditional support for new developments where these new developments demonstrate they will not have significant adverse effects or impacts on the surrounding environment, residential or regional amenity:

TOU-P-18: *It is a policy of the Council to consider development proposals for extensions to existing parks for mobiles homes/static caravans (including facilities for Touring Caravans, Campervans, Motorhomes and Camping) in both urban and rural areas, excluding areas of Especially High Scenic Amenity where they comply with the following criteria:*

The specific criteria set out in the *Tourism Developments General Criteria Policy (TOU-P-20 refers)*. The location siting and design of the development generally accords with the Caravan and Camping Parks Registration and Renewal of Registration Regulations, 2009 or any subsequent related regulations.

TOU-P-20 contains more specific guidelines to all new tourist developments, such as caravan and campsites, such as the location of new sites, proximity or effects on high amenity areas, effects on visual amenity, site servicing and setback among other criteria towards new tourist developments.

The Site Layout

Within *Appendix 3: Development Guidelines and Technical Standards* are guidelines towards the nature and layout of new caravan and campsite developments. These guidelines address aspects of site layout such as:

- Site density maximum of 50 caravans per hectare or 20 caravans per acre
- Minimum clearance between pitches, site boundaries, roads and site carriageways
- Adequate lighting at site entrances, exits and site carriageways
- Servicing of sites such as water availability, electricity
- Fire safety standards such as fire hydrant and hydrant water supply

B.2 Sligo County Development Plan 2017 – 2023

In line with similar policies of the other counties along Ireland's Wild Atlantic Way and South-West Coast, the Sligo County Development Plan highlights the importance of development of new or existing tourist facilities within the existing footprint of towns and villages while also demonstrating that developments or facilities will not have significant adverse effects or impacts on the surrounding environment, residential or national amenity.

P-CZT-1: *Ensure that future caravan, camping and parking facilities in coastal areas will not be visually intrusive or impact on sensitive coastal environments (e.g. sand dune systems), by requiring, inter alia, appropriate siting, layout, design and natural screening, and compliance with the requirements of the Habitats Directive. On beaches, within dunes and in other vulnerable areas, manage and control car parking, vehicular and pedestrian movements in compliance with the requirements of the Habitats Directive where relevant.*

As outlined, this policy is heavily focused on maintaining healthy coastal environment systems. In this vein, the policy relating to new tourist facility development is closely aligned and complemented by policies regarding raising the awareness and appreciation of these coastal environments as key to the heritage and identity of Sligo and the wider Wild Atlantic region:

P-CZT-2: *Promote awareness of the sensitivity of the coastal environment through the provision of heritage appreciation programmes, public information boards and other appropriate means.*

O-WAW-4: *Monitor the future development of the County's section of the Wild Atlantic Way touring route to ensure that the scenic and tourism value of this important amenity is maintained. This will be done in co-operation with state agencies, local community groups and other bodies interested in protecting the coastal environment and in improving access and visitor management to the Wild Atlantic Way.*

B.3 Mayo County Development Plan 2014 – 2020

The Economic Development Strategy within the Mayo County Development Plan highlights the importance of developing tourism facilities within the existing built-up footprint of its towns and villages. As such, specific guidelines are proposed for the development of new tourism facilities such as caravan, campervan and campsites:

TM-02: *It is an objective of the Council to ensure that tourism related accommodation such as holiday homes, hotels, caravan/camping parks etc., are located within existing settlements where there is existing infrastructure provision to service the development and where they can contribute to maintenance of essential rural services, unless it is proposed to reuse an existing structure outside a settlement and in such cases where it can be demonstrated that the development will not have significant adverse effects on the environment, including the integrity of the Natura 2000 network, residential amenity or visual amenity.*

Similar to the Galway County Development Plan, objectives and guidelines within the Mayo County Development Plan give conditional support to the development of tourist facilities outside the existing footprint of the county's settlements **'where it can be demonstrated that the development will not have significant adverse effects on the environment... residential amenity or visual amenity.'**

B.4 Galway County Development Plan 2015 – 2021

Given Galway's strategic positioning along the Wild Atlantic Way and Atlantic Economic Corridor, its established tourism industry is a key foundation of its economic pedigree. While the County Development Plan illustrates a need to concentrate new development within the existing urban settlements of both Galway City and the wider county, the Development Plan recognises that the nature of the tourism industry often requires development in locations outside this existing footprint, such as for caravan, campervan and campsites. Specific guidelines are given toward the development of new campsites, in particular, their visual and contextual impacts on the surrounding region:

DM Standard 14: *Camping and Caravan Sites - Any proposed caravan or camping sites shall have regard, in scale and layout design, to the existing character of the village and its residential amenity. An operational management plan shall be submitted with the necessary planning application. The Planning Authority will consider appropriate extensions to existing facilities.*

These guidelines surrounding the development of caravan, campervan and campsites are also transposed throughout the various LAPs of Galway, with many LAPs outlining conditional support for newly developed sites.

B.5 Clare County Development Plan 2017 – 2023

Within the Clare County Development Plan is a chapter dedicated to the West Clare Municipal District. Within this chapter, specific objectives for towns of varying spatial

scale are outlined. Given the value of West Clare's natural amenity and heritage, tourism development as part of wider economic development features heavily in these objectives. For many of these towns, including Lahinch, Kilkee and Liscannor, objectives relate to the specific zoning of land for the development of caravan, campervan and campsite facilities.

TOU1 East of Miltown Malbay Road, Crag: *These lands have been zoned for Tourism purposes to facilitate the expansion of the caravan park/tourist facilities subject to environmental, EIA and visual impact considerations.*

These land-use zonings are conditional to appropriate pre-planning and compliance to planning procedures such as environmental, Environmental Impact Assessment (EIA) and visual impact considerations where required. These sites were designated for the development of tourist facilities based on their proximity to existing and supporting infrastructure, such as primary roads, town and village centres and public services. Any planning applications for the development of these sites must also be able to demonstrate the need for any such tourism-related industry at these locations:

TOU12 Bog Road, Kilkee: *Development will be contingent on demonstration of the need for any such tourism-related industry at this location.*

B.6 Kerry County Development Plan 2015 – 2021

Similar to Donegal, the natural capital of Kerry is regarded as some of the highest quality natural amenities in the country. As such, tourism plays a significant role in both the social, environmental, and economic development of the county. The Kerry County Development Plan 2015 – 2021 outlines specific objectives and guidelines concerning the caravan, campervan and camping sector within both the 'Tourism and Recreation' and 'Development Management - Standards & Guidelines' chapters of the development plan.

Given the important relationship between both the natural amenities and tourism sectors in Kerry, specific regard is given toward this relationship in its tourism and recreation policy:

T-43: *Ensure that future caravan, camping and parking facilities in coastal areas will not be visually intrusive or impact on sensitive coastal environments (e.g. sand dune systems), by requiring, appropriate siting, layout, design, and native locally provenanced natural screening, the protection of biodiversity and compliance with the requirements of the Habitats Directive.*

Further planning and development guidelines related to the provision of caravan, campervan and camping facilities are outlined within Chapter 13 of the development plan, 'Development Management - Standards & Guidelines'. Emphasis is made within this chapter on support by Kerry County Council for the development of both new and existing campsites, conditional to a suite of guidelines provided in the development plan:

- Caravan parks will not generally be permitted in **proximity to the coastline**

- Location of the development **relative to existing services** including retail and social facilities.
- **Availability of services** to cater for the development
- Impact on **existing residential amenities** - overlooking, increased traffic and general disturbance will be considered
- **Capacity of road** to cater for the development - direct access onto national primary or national secondary roads will not be permitted
- **Landscaping** - every application for a caravan park must be accompanied by a comprehensive landscaping plan both proposed and existing which in addition to creating an attractive residential environment effectively screens the development
- An **appropriate assessment** under Article 6 of the Habitats Directive, where applicable, shall be carried out in consultation with the National Parks and Wildlife Service
- Where a proposal relates to the extension of an existing caravan park, a **master plan** demonstrating how the proposal relates to, and integrates with, the existing park
- Where the existing and proposed caravan park will share amenities, the application will also be required to show the **sufficient provision of amenities** required to serve the enlarged population.

B.7 Cork County Development Plan: Cobh Local Area Plan 2017 – 2022

Despite an absence of specific objectives or guidelines towards the development of caravan, campervan and camping sites within the Cobh Local Area Plan (LAP), related objectives and guidelines regarding the economic development of Cobh can be seen as proxies toward the support of caravan, campervan and campsite development in the Cobh area.

The LAP highlights the importance of Cobh Harbour as a key catalyst towards achieving the economic and employment growth targets of the Cobh Municipal District, primarily in further developing tourism within the town:

“3.2.26 - The greatest potential for economic and employment growth in Cobh lies in developing the tourism function and this is multi-faceted. Cobh’s harbour setting is a key natural asset of the town, providing opportunities for recreation and marine leisure activities while the town’s rich historical heritage, and relationship with Spike Island and the other military fortifications within the harbour, also offers significant tourism potential...”

With the current location of Aire de Service parking in Cobh at Five Foot Way, in close proximity to Cobh Cruise Terminal and Train Station, the potential for increased tourism

from caravan and campervan visitors from the wider development of supporting infrastructure is recognised by Cork County Council.

B.8 Waterford County Development Plan 2011 – 2017

Caravan and camping sites are recognised by Waterford City and County Council as important economic drivers for Waterford, particularly rural and isolated areas. As such, the Waterford County Development Plan outlines specific guidelines towards the sustainable development of both new and existing caravan, campervan and campsites at various price ranges and locations:

Policy ECD 29: *To consider the provision of caravan and camping sites at appropriate locations where they do not cause landscape or environmental degradation and are consistent with the Settlement Strategy for the County, and incorporate a high standard of layout, design, landscaping and amenity in such proposals.*

Settlements such as Tramore are defined as Secondary Service Centres in the County Settlement Strategy, which have objectives to widen their economic bases so as to retain population, employment and vitality within their settlement boundaries. Given these objectives, the appropriate development and upgrading of are seen as appropriate ways to increase economic activity in these service centres through increased visitors and holiday makers.

C Appendix 3: List of Stakeholders

The stakeholder engagement strand of the research involved the following:

1. A series of semi structured interviews with key stakeholders as follows:

- Donegal County Council;
- the NPWS;
- Fáilte Ireland,
- The Irish Caravan and Camping Council;
- Total Camping Ireland;
- Donegal Caravan and Camping Parks Association (DCCPA);
- Total Motorhome Ireland
- Community representatives.
- Representatives from international case study examples of good practice within the CCC sector in France and Portugal.

2. A series of online workshops with Elected Representatives across County Donegal: These were structured workshops with elected representatives from the five Donegal MD's of Donegal; Glenties; Inishowen; Letterkenny/ Milford; and Lifford / Stranorlar.

3. In addition, as part of the study, five online surveys were produced and issued with a focus on engaging:

- The residents and businesses of Donegal: This survey received 1792 responses
- The residents and businesses of Donegal (as Gaelige): This survey received 1 response
- The motorhome and campervan user community: This survey received 1195 responses
- The motorhome and campervan user community (as Gaelige): This survey received 0 responses
- The current campsite service providers of Donegal: This survey received 61 responses