

BIBRACTE AND ITS TERRITORY TOURISM STATISTICS REVIEW

2018-2019



Established in 2018, the Bibracte tourism observatory aims at developing a shared tourism project for the area with 5 objectives:

1. Stabilise the survey protocol for Bibracte's public visitors in order to better understand the evolution of the data over time.
2. Study the perception of Bibracte by its visitors and its partners and compare it with the performance of other places that welcome the public.
3. Identify areas for improvement (in particular by understanding the reasons for dissatisfaction among visitors and the categories of public who visit other sites but not Bibracte).
4. Develop a shared knowledge base to initiate the necessary debate on the subject of tourism development on a local scale.
5. At a time when public action has been greatly affected by the reorganisation of the territories resulting the NOTRe law in France, create a space for informal dialogue on the challenges of tourism and the residential economy and involve local actors in the management of the site.

In order to meet these objectives, we decided to use **the EVALTO method**, a collaborative evaluation and decision support tool designed to create territorial intelligence at the service of sustainable tourism policies.

3 experts from the EVALTO team were mobilised:

- Jean-Pierre Martinetti, project manager, specialist in local development and sustainable tourism
- José-Pierre Cholvy, survey and observation expert and observation of tourism
- Jean-Marc Lusson, expert in data and statistical and econometric databases

Surveys were conducted in 3 languages at 3 different stages: 80% face-to-face (10 minutes to 1-hour

interviews), on social networks, by telephone and via web hosts and among:

- **over 500 visitors** on the www.bibracte.fr website in 2018;
- **140 socio-professionals and institutional stakeholders** (tourism and services actors, elected officials, etc.) in early 2019;
- **200 residents** (including second homes) throughout the 2019 season in different places (festivals, markets, social networks).

An equivalent of a part-time job (25%) has been dedicated to carry out the surveys. As many local partners have been involved in the process, **the links between Bibracte and the local players have been strengthened** and the visibility of the institution's actions has been increased.

Two meetings were held to present the results to the partners: in January 2019 for the results of the visitor survey and in December 2019 for the cross-referencing data from the three surveys.

OVERVIEW OF BIBRACTE'S ATTENDANCE

Statistics presented here do not consider data for the year 2020, which are atypical due to the epidemic. Nevertheless, it should be noted that, despite a very low attendance rate (-40% compared to 2019), the year 2020 ended with a very good summer attendance (+8% in July and in August), with an increased presence of city dwellers, which compensated for the fall of foreigner visitors during this period (+75% in July and +31% in August for Ile-de-France Region residents). The figures show that the new "post-covid" context reinforces the attractiveness of the site.

After a slight decrease between 1996 (the year the museum opened at full

capacity) and 2013 (a year disrupted by the completion of the renovation of the permanent exhibition), the museum attendance has grown steadily, approaching 50,000 visitors (registered at the museum ticket office) in 2019 and thus significantly exceeding the initial attendance.

Although the annual attendance is spread over 8 months, the museum being closed from mid-November to mid-March, the heart of the tourist season accounts alone for more than 40% of visitors over two months (July-August). **The majority of visitors are families and friends (75%).** The groups are mainly school groups (70% of the total number of groups, i.e. nearly 8,000 children), with a stable number of visitors, as accommodation capacity on site for this category of public is fully utilised.

80% of the visitors are French, with three origins:

1. Bourgogne-Franche-Comté: 36% (Saône-et-Loire: 17% ; Nièvre: 8%)
2. Île-de-France: 15%.
3. Auvergne-Rhône-Alpes: 10%.

International visitors are from Western Europe, in accordance with what is observed more generally in the Morvan:

1. The Netherlands: 7.6
2. Belgium: 3.8
3. Germany: 3.6%.

The growing share of non-regional visitors reflects **Bibracte's reputation is on the rise**.

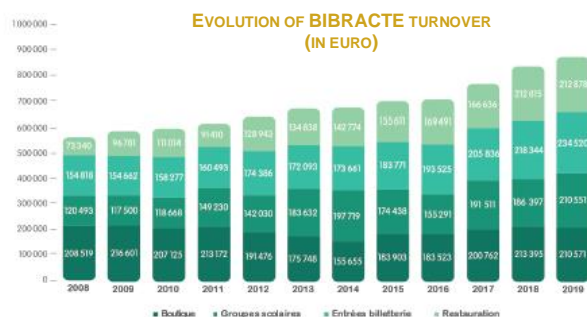
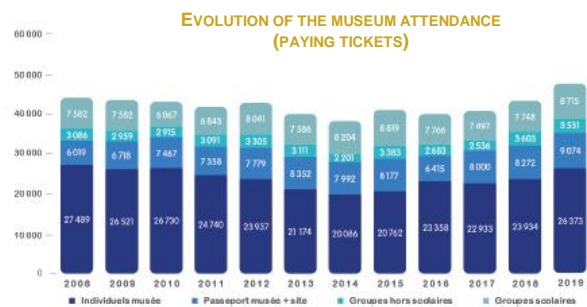
As access to Mount Beuvray is free, it is not possible to quantify its attendance precisely. It is estimated to be twice that of the museum.

The turnover is divided into four almost equal parts between the

museum ticket office, the school public, the store and the restaurant. The fact that it has grown faster than attendance is due to the regular reinforcement of Bibracte's offerings.

It is therefore correlated with the increase in the time visitors spend on the site.

For example, the product "La journée gauloise ("Gallic day"), created in 2009, saw a 60% increase in sales between 2013 and 2020.



WHO ARE VISITORS AT BIBRACTE?

The survey conducted among more than 500 visitors in 2018 and spread out over the entire season, allowed us to characterize the profile of the so-called "individual" public, i.e. visiting the site in informal groups (families and groups of friends; 98% of respondents). 77% of respondents were French, with a predominance of Burgundians (31%).

There was a significant presence of **families** (1 out of 2 cases) with two

children on average, and **couples** (1 out of 3 cases).

For obvious reasons of accessibility (the site is not served by public transportation), the vast majority of visitors had used an individual vehicle (94%, including 4% of campers). Soft mobility (bicycle and pedestrian) is marginal.

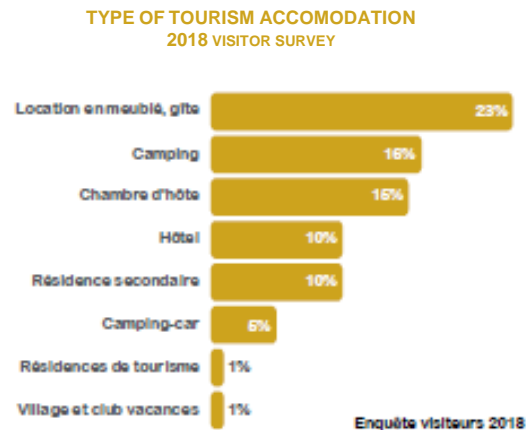
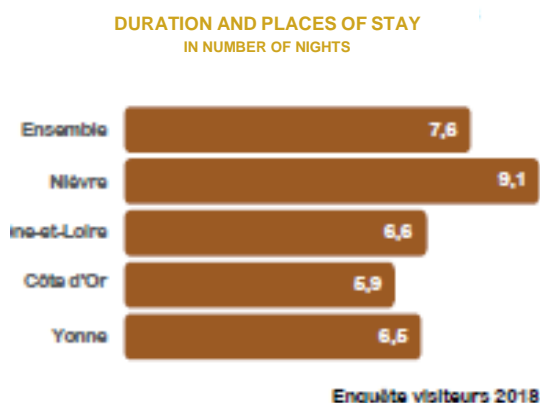
6 out of 10 visitors belong to the **upper socio-professional category**.

4 out of 10 visitors are **over 55 years old**.

Two thirds are first-time visitors. **The last visit was less than a year ago** for 40% of those who have already been there.

This is a **well-informed public**, sensitive to cultural offers, with a double sensitivity to **culture/heritage** and **nature/environment**.

A third, however, described themselves as "unfamiliar" with Bibracte's archaeological offerings.



Two-thirds of the visitors are tourists **staying in the region**, mainly in Nièvre (48%). Three quarters of them stay in commercial accommodation (gîte, camping, bed and breakfast) for more than a week.

The main elements that **triggered their discovery of the site** were word of mouth (28%), the museum brochure (25%), recommendation of a host or reading a tourist guide (20%), the website (12%), a tourist office (9%).

64% of visitors gave Bibracte a score of 9 or 10 out of 10. Six out of ten visitors are **potential ambassadors** for Bibracte.

The highest satisfaction rates are the guided tour (81% "very satisfied") and the quality of the archaeological site (77 %).

- The strong points most often mentioned were quality of the welcome, quality of the museography, originality of the menu of the restaurant Le Chaudron, cleanliness of the site.

- The points that lead to some reservations: signage and site amenities (benches, tables...), adaptation of the museum to children, digital tools to accompany to the visit (audio-guides, tablets).

The most visited touristic spots around Bibracte during a stay are: Autun (26%), Lac des Settons (13%), Beaune (9%), Vézelay (8%), Dijon (7%), the Muséo Parc Alésia (7%), Guédelon (5%), Cluny (5%).

VISITORS, RESIDENTS AND TOURIST ACTORS'S PERCEPTION OF BIBRACTE

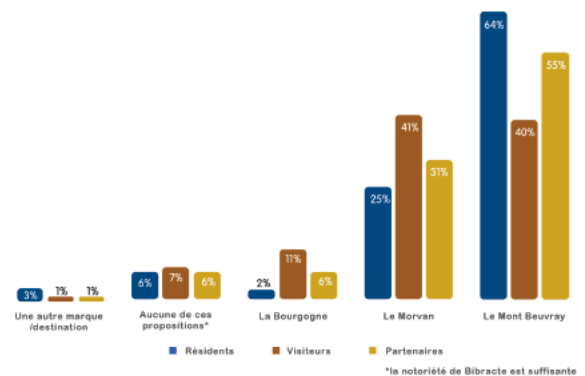
All the audiences surveyed spontaneously put forward the following words: "Gaul", "Archaeology", "Excavations", "History", "Nature" which clearly identify the different components of Bibracte's identity. In assisted evocation, Bibracte is much more often associated with Morvan than with Burgundy.

7 out of 10 visitors leave with a positive image of Bibracte, and only 1% with a degraded view (which is mainly due to the by the weather conditions).

Residents have only an approximate vision of Bibracte's management, this was evaluated using checklists:

- The management authority indicated is the Morvan Regional Nature Park (29%), a public company dedicated to the site (28%), or even the Ministry of Culture (22%), which reflects a lack of knowledge of the subject, with less than a third of relevant answers (i.e. a dedicated public company).
- The number of employees in the team (35 full-time equivalent jobs) is well estimated for 34% (between 25 and 50 people), but underestimated for 41% of respondents (between 10 and 25 people)
- The number of visitors to the museum is well estimated by only 19% of respondents (between 40,000 and 50,000). The answers were very spread out, with a median of 30,000.

- Mount Beuvray is a protected area for half of the respondents. To the question concerning the modalities of its protection, the Grand Site de France label is spontaneously put forward by a third of them (a higher proportion than expected), then the archaeological and Morvan Regional Nature Park.



PERCEPTION OF THE TOURISM ACTIVITY

There are substantial differences between the various publics surveyed.

50% of the residents and partners consider the level of tourist activity as strong, compared to only 37% of visitors.

Similarly, attendance is considered low by only 7% of partners and 10% of residents, compared to 13% of visitors. Visitors therefore perceive the pressure of tourism to be much lower than partners and residents.

All the people interviewed share the vision of a "passing through" territory which does not know how to retain its visitors. This vision contradicts the reality of the facts, since the tourists who visit Bibracte spend an average of more than 7 days in the territory (see above).

A large proportion of the partners (38%) believe that **the area has assets to better attract tourists** who are passing through the area. **To transform this territory into a place of stay**, the priorities seem to differ according to the target: increasing awareness, enhancing local identity (which is mainly promoted by residents) and enriching the offer and services (hiking, accommodation transport...).

To the question of which actors should **lead and support the development of tourism**, the partners mention in order: the sites (80%), the accommodation providers (78%), service providers (excluding accommodation providers; 63%), the Morvan Regional Nature Park (62%), the tourist offices (60%), the Region (39%), the local population (37% according to residents), the departments (29%), the communities of communes (27%), the communes (24%).

We can therefore see that the operators of tourist sites and accommodation providers are considered to be more relevant actors than public operators for the promotion of the region.

Nevertheless, 9 out of 10 residents and partners surveyed consider **it is important to define and implement a local tourism development strategy** for Bibracte and its surroundings, as the existing one seems relevant to only 33% of respondents and insufficient for 43%.

Residents (53%), elected representatives (60%) and partners (74%) feel **directly concerned by tourism activity on the territory**, which is perceived as an important economic contribution and a vector of reputation. They all share a **positive perception of tourism**, which is generally considered to have a positive impact on the area, but **impact on the**

quality of life represents a risk for residents. 23% of them fear a disruption of their everyday life, saturation of tourist sites (18%) or an insecurity increase (8%).

Almost all residents (97%) have a **strong expectation for tourism development**, provided that it is a controlled, reasoned, eco-responsible and sustainable development. 19% of them consider **themselves strongly involved in the development of tourism** and 59% are ready to increase their involvement.

Finally, 9 out of 10 residents are occasional or regular **hosts**, promoting activities and even accompanying their guests for 83%, which shows that the residents are an effective lever for promoting of the territory's offer.

WHAT CAN WE CONCLUDE

About the Observatory

1. Bibracte is willing to **establish the observatory in the long term** in order to be able to better measure the evolution of the quantitative and qualitative parameters linked to its public reception activity. To this end, a database has been established.
2. We are currently in the process of **recovering survey data** that have been carried out since the opening of the museum in 1995, to enrich the database, and **cross-referencing the results** with other sources of information.
> A consultation with BFC Tourisme (regional tourism committee of Burgundy- Franche-Comté region) has been set up to this end.
3. **New targeted annual surveys are planned for the future**, with a dual objective of deepening certain themes (e.g. motorhome users in 2021) and to renew the surveys at an appropriate frequency to monitor the evolution of

trends. These **new results will be shared as widely as possible** with the actors of the territory in order to contribute to the construction of the "tourism and residential economy" section of the territorial project developed within the Grand Site de France label.

4. Above all, it is essential to **deploy the approach in other places** comparable to Bibracte in order to obtain elements of comparison that are not limited to quantitative data on visitor numbers.

> An embryonic collective has been set up in Burgundy-Franche-Comté, with 6 managers of heritage sites.

> The experience was shared with the more than 40-member territories of the Grands Sites de France network

Lessons already learned in conducting the surveys

1. The survey results sometimes go against the preconceived ideas, for example with regard to the length of stay: **Morvan is already a destination of stay** (which benefits from a widespread supply of accommodation offer, which is diffuse but very dense) and not a destination for passing through as the territory's decision-makers imagine. This should lead to a reorientation of the territorial strategy.

2. **Residents have a strong interest in tourism issues**, being both aware of the benefits that the activity can bring to the territory, particularly in terms of services, and concerned that the development of tourism is perfectly controlled so that it does not become a nuisance. The territorial strategy must therefore consider the wishes of the residents and involve them in the decision making.

3. Tourism must be considered in the wider context of the residential economy, especially as the territory of the Mont Beuvray area is **benefiting from a strong revival of residential attractiveness** following the epidemic,

combining environmental quality and the proximity of several metropolis (notably Paris and Lyon). These new residents are particularly attentive to preserving the quality of the territory and, therefore concerned to avoid the poorly controlled development of tourism.

4. The meetings organized for sharing the results of the survey have already enabled the initiation of a collective approach, in the form of a working group led by Bibracte of about 20 tourism and service providers (accommodation providers, restaurant owners, nature activity providers, tourist offices). This group developing a **slow tourism offer** on the territory.

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*English version: translated with
www.DeepL.com/Translator*



Bibracte is a Public Establishment for Cultural Cooperation (EPCC).

Bibracte EPCC's members are :

- the French State
- . the Regional Council of Burgundy Franche-Comté
- . the Nièvre Departmental Council
- . the Departmental Council of Saône-et-Loire
- . the Morvan Regional Nature Park
- . the Centre des Monuments nationaux
- . the Centre national de la Recherche scientifique

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