



Sustainable Tourism in Ireland

Understanding the opportunity

Fáilte Ireland



Research Objective

To identify future-facing sustainable travel experiences that could help bridge the say-do gap and motivate people to make sustainable trip choices.

Research Summary

To fulfil the Research Objective:

- Quantitative online surveying was conducted in key markets: **Republic of Ireland, United Kingdom, United States, Germany, and Sweden.**
- Within this survey, **sustainability initiatives/signals** likely to positive influence holiday experience across four key categories were analysed:
 - **Accommodation; Restaurants/bars/cafes; Activities; Attractions**
- Key analysis groups included:
 - **Eco Segment:** Actives, Believers, Considerers, Dismissers (definition within appendix)
 - **Life-stage segments:** (Unconstrained Adults Under 45 years; Unconstrained Adults 45 years and over; Families with dependent children)
- In addition, **leading edge brands, influencers and social media content** from early adopters of sustainable tourism was analysed to understand the most emergent, future-facing themes around sustainable tourism.

Full details can be found in the appendix.

Key Learnings

1

While tourism audiences are more sustainability-minded than the general public, they **don't yet know what sustainable travel means**.

This, however, can change at an unanticipated and fast pace, so the industry must lead the way and be prepared for the tourist of the future who demands sustainable choices.

2

Personal **enjoyment and experience** is crucial to sustainable tourism. Brands and providers have an opportunity to speak to sustainability-related **travel motivations** to do with experiencing and immersing in nature, connecting with local culture and community authentically, and seeking personal mental wellbeing.

3

In addition, there is an **emergent expectation** for sustainably minded tourists that they and providers should

- Minimise any negative impact on the environment
- Make sustainable choices as easy as possible
- Particularly benefit the local community and economy, through for example partnerships

4

Providers need to think about creating **sustainable experiences holistically**, considering.

- The ways in which they can have the biggest genuine **impact**
- The right **proofpoints** to call out to consumers to communicate sustainability
- The **experiences** they create to make sustainability enjoyable and immersive

Creating Enjoyable and Sustainable Experiences

Sustainable tourism encompasses different dimensions

Environmental

Committing to long-term conservation and sustainable use of the environment

Respecting sensitive natural habitats and protected areas, are minimizing damage to the landscape

Reducing waste and resource consumption and focusing on environmentally friendly mobility

Economic

Giving preference to local products and partnerships, thereby strengthening regional cycles

Offering attractive jobs and involving employees in the sustainable further development of offers – e.g. finding roles for employees outside of tourist seasonality

Embedding sustainability efforts in corporate strategy and defining and implementing measures in a targeted manner

Social

Addressing, cultivating and promoting regional culture, and enabling exchange between visitors and local people

Inclusion and diversity – responding to guests' specific needs, such as accessibility or family-friendliness

The sector faces some challenges in providing sustainable tourism

The number of travellers is growing



The availability of air travel at affordable rates has led to increasing air emissions



The sector can be seen to be trailing other industries in terms of transitioning to sustainability with purpose



There are three powerful drivers that connect with sustainable travel

Overarching travel drivers and sustainability are increasingly entwined with one another. These drivers reflect travel trends.

IMMERSED IN NATURE

As a general travel driver:

Experience a refreshing change of scene, explore and adventure in nature and enjoy the positive impact it has on us.

The sustainability story:

Pursuing travel that facilitates direct connection with the natural world, as a reminder of the beauty and power of the natural world that needs to be preserved and protected.

CULTURE & CONNECTION

As a general travel driver:

Exploring new cultures and learning something new, visiting a place with a particular personal interest.

The sustainability story:

Supporting and preserving culture - finding connections with local people, culture and history, teaching respect for the destination – both its past and present, and inspiring others to take these values forward in their own travel.

MENTAL WELLBEING

As a general travel driver:

Pure relaxation and self-care, spending quality time with oneself or with loved ones and switching off from work/ everyday life.

The sustainability story:

This is about sustainable travel that is good for the mind and soul; escaping from the toxic, fast-paced lifestyles that can be harmful to the people and the planet and re-focusing on mental health & emotional wellbeing.

Immersed in Nature

This driver is about sustainable travel that facilitates direct connection and immersion in the natural world, providing many with a reminder of *why* they want to approach travel sustainably, to preserve and protect the natural world and leave the beauty of nature for future generations to enjoy.

Visual Codes



Leave No Trace

Showcasing epic adventures and celebrating a direct connection to expansive landscapes and wilderness. **A conscientious form of travel that prioritises caring for the wondrous, beautiful surroundings, designed to have minimal impact on the world** which also facilitates a closer, more direct immersion in the environment.



Fresh Perspectives

Vast landscapes that show people in moments of reverence, awe and wonder at the world around them, instilling a sense of stewardship. An appreciation of what has been here for longer than any person can remember, and a **desire to document, protect and preserve these precious landscapes.**



Nature's Sanctuary

Nature provides a sense of comfort and peaceful cocooning, a vibrant refuge of calm away from the busyness of everyday life. An intimate, and more achievable, immersion in nature that surrounds the senses and instills a sense of harmony with the natural world. **Remote experiences and accommodation that prioritise a connection to nature help to facilitate this immersion.**

Culture & Connection

This driver is about sustainable travel that promotes connections with local people, culture and history, as well as with those on the journey with you; teaching respect for the destination – both its past and present.

It's also about taking this knowledge and newfound reverence and spreading it within your own community; inspiring others to take these values forward in their own travel.

Visual Codes



Authentic Culture

Immersing yourself in the local culture – **whether that be meeting the local and indigenous people, admiring the traditional dress or partaking in native rituals. A respectful form of travel which holds the locals and their livelihoods in high esteem;** to be learned from rather than exploited.



Shared Learnings

Instilling the values of sustainable travel within those around you; whether that be the group you travel with or those you meet on your journey. **A collaborative form of travel with a sense of being on this sustainability journey together** and connecting through a common goal.

Mental Wellbeing

This driver is about sustainable travel that is good for the mind and soul; acknowledging we live symbiotically with nature, and the positive impact that fresh natural environments – pure air, greenery, blue waterscapes.

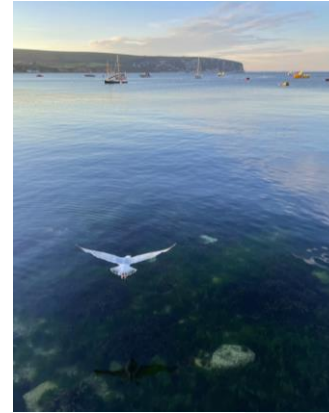
It's also about escaping from the toxic, fast-paced lifestyles that can be harmful to the people and the planet, and re-focusing on mental health & emotional wellbeing.

Visual Codes



Grounded Moments

Being fully present in the small moments during travels; slowing down, reflecting and taking the environment around you in. **Natural landscapes and reflective poses cue a sense of calmness and an appreciation for the environment that inspires it.**



Calming Blue

We see people immersed in calming, natural blue landscapes; looking out into endless blue skies or waterscapes. **This space is about celebrating the calming effect that natural landscapes, and being immersed in them, has on us.**



Slowmad Living

This space is about a longer trips and adventures and a slow traveller mindset. It's about taking the time to travel in a way that respects nature, but also about **questioning established ways of living, in search of simpler, more rewarding and more sustainable alternative ways to exist on this planet.** Being off the beaten path is key to this space.

To create winning sustainable tourism experiences, 3 core factors need to be considered

IMPACT

What are the steps that will enable us to become more sustainable?

This is essential for **credibility**, and to avoid greenwashing.

How do we make a positive sustainable impact?

PROOF POINTS

What are the features and signals consumers are looking for both today & tomorrow?

i.e. the proof points consumers are looking for to feel good about their experience.

EXPERIENCE

How do I create an experience that is both enjoyable & sustainable?

Driving **experiences and storytelling** that resonate with the core sustainability related travel motivations



Creating enjoyable, sustainable experiences that have impact:

Accommodation



Proof points that will make consumers feel good about their experience are largely reflective of those factors that we know impact sustainability in the accommodation sector.

Proof Points...

Priority initiatives that will positively impact accommodation experience - *identified by the majority of markets.*

Top Priorities

- Using solar power panels or other renewable energy
- Segregating waste to reduce amount going to landfill
- Having partnerships with local farmers and food producers
- Being an employer who does not discriminate on the basis of race, colour, religion, gender or age (4 out of 5 markets)
- Accommodation that doesn't use single-serve disposable items (cups, cutlery etc.) – (3 out of 5 markets)

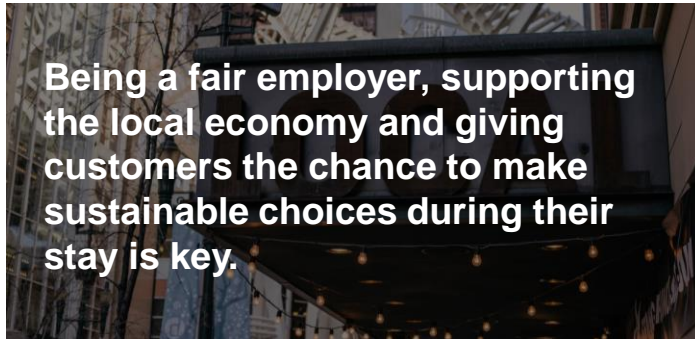
Lower priorities

- Allowing guests to carbon offset by providing donation services which support local environmental programmes
- Providing charging stations for electric cars
- Using larger, reusable toiletry containers instead of single-use disposable toiletries
- Using organic towels and linens (bottom five in 3 out of 5 markets)

Accommodation: Proofpoints to address today and tomorrow

NOW: Today's must-meet expectations

Signals to cue across the consumer experience



- **Being an employer who does not discriminate.**
- Being committed to using local services.
- Being locally owned/operated
- Having adjustable heating in rooms – (to save energy).
- Providing the opportunity to re-use towels (to aid water consumption).

NEXT: Opportunities to lead the way

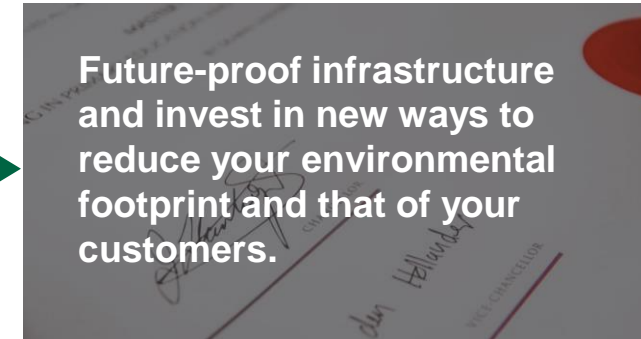
Invest to lead the way & tell emotionally resonant stories



- **Local food partnerships.**
- **Using solar panels/renewable energy.**
- **Commitment to waste separation/ segregation/ reduction.**
- Chemical free cleaning products

FUTURE: Start planning

Start feasibility planning



- **Being certified sustainable**
- **Rewarding guests who travel environmentally.**
- Adopting carbon offsetting e.g. by planting trees.
- Reducing water consumption.
- Offering carbon off-setting via donation.
- Having charging stations for e-cars

Green font = Amongst the top 5 accommodation signals that will make people feel good about their experience

Blue font = Over-indexing for eco-actives* in the UK and in the US

How do I create a future-facing experience that is enjoyable & sustainable?

By creating accommodation experiences that incorporate sustainable feel good factors, alongside design cues that tap into 3 core sustainable tourism drivers: Immersed in Nature, Culture & Connection and Mental Wellbeing.



Driver: Culture & Connection

Celebrating Local Brands

Highlighting attention to detail from accommodation providers that are supporting local businesses, suppliers and creators. Emphasis is on how these details provide a unique & high quality experience, supporting the local economy and can make customers feel special.



Driver: Immersed in Nature

Integrated Greenery

Incorporating greenery to elevate interiors and bring the outside in. Spaces are modern and can feel urban, but the presence of plants can allow you to appreciate nature up close and personal.



Driver: Immersed in Nature

Windows to the World

Wall-length windows with a view of vast, sweeping landscapes; creating a sense of awe at the world around you. Often accompanied by a place to sit or lay back, inviting you to take a seat and simply enjoy the view.



Driver: Mental Wellbeing

Calm Luxury

Soft, light furnishings and a sense of stillness, giving you permission to relax and put your mental wellbeing at the top of your priorities. Facilitating truly slow travel which promotes wellbeing and comfort.

Implications for the accommodation sector

Treat nature with respect

IMPACT

- Minimise environmental impact by lowering carbon footprint and reducing energy consumption

PROOFPOINTS

- Integrate energy saving technique such as solar panels or other renewable energy sources
- Improve waste management to minimise impact on landfill

EXPERIENCE

- Integrate nature into your spaces in a way that benefits both people and planet
- Emphasise and educate on the benefits of nature
- Package sustainable initiatives alongside elevated natural design cues that remind people of the beauty and benefits of nature

Create a positive local impact

- Establish relationships with local producers to reduce carbon footprint and improve waste management

- Make partnerships with local people, products and food a core element of your unique offering

- Celebrate local businesses through your partnerships, as well as storytelling – providing a high quality experience that makes people feel like they're part of local culture, and discovering local brands & foods

Creating enjoyable, sustainable experiences that have impact:

Restaurants, Bars & Cafes



Social responsibility in conjunction with a food experience that celebrates local partnerships and seasonal menus, cues to a more enjoyable sustainable restaurant, bar & café experience.

Proof Points...

Priority initiatives that will positively impact restaurant/bar/café experience - *identified by the majority of markets.*

Top Priorities

- Donating surplus food to local charity organisations/food redistribution centres.
- Having partnerships with local farmers and food producers
- Local seasonal menus
- Growing your own produce (4 out of 5 markets)
- Employs energy saving mechanisms (UK & US only)
- No single serve disposables (DE and SW only)

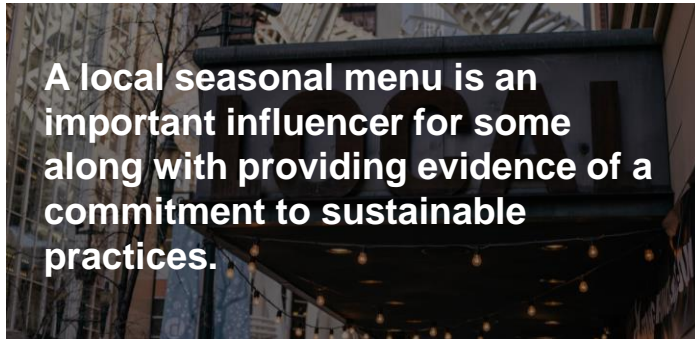
Not priorities

- Outlining sustainable practices so guests are aware
- Using QR code menus to reduce paper usage
- Using cloth napkins instead of paper
- Using chemical free cleaning products and detergents (3 out of 5 markets)

Restaurants/Bars/Cafes: Proofpoints to address today and tomorrow

NOW: Today's must-meet expectations

Signals to cue across the consumer experience



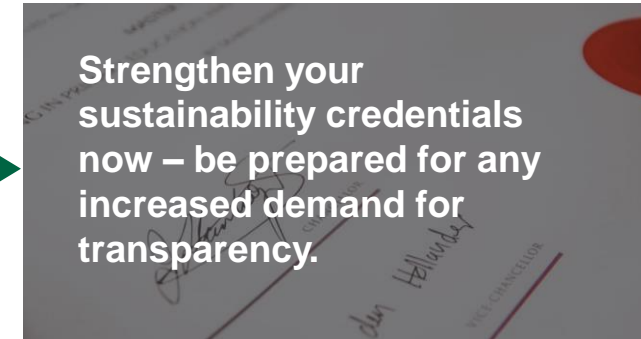
NEXT: Opportunities to lead the way

Invest to lead the way & tell emotionally resonant stories



FUTURE: Start planning

Start feasibility planning



Key Signals

- **Local seasonal menu's**
- No single serve disposables
- Being locally owned/operated

- **Growing your own produce.**
- **Local food partnerships.**
- **Providing surplus food to local charity organisations/food redistribution centres.**
- **Employing energy saving mechanisms.**
- Segregating waste.
- Having a fair wage policy

- **Outlining sustainable practices**
- **Eco-green certification**
- Having chemical free cleaning products

Green font = Amongst the top 5 restaurants/ bars/ cafes signals that will make people feel good about their experience

Blue font = Over-indexing for eco-actives* in the UK

How do I create a future-facing experience that is enjoyable & sustainable?

By creating restaurant experiences that incorporate sustainable proof points, alongside design cues that tap into 3 core sustainable tourism drivers: Immersed in Nature, Culture & Connection and Mental Wellbeing.



Climatarian Creativity

New, exciting, beautiful food experiences – heroing humble ingredients like vegetables with artistry & creativity. Seasonal ingredients are often fresher, thus inspiring a more innovative approach to cooking. Seasonal and sustainable food is beautiful, and still offers a unique and elevated dining experience.



Close to the Source

Sustainable restaurants are becoming increasingly self-sufficient, and are prioritising the people and produce behind their business in the sustainability stories they are telling. As people seek more meaningful and differentiated experiences, they want to know the unique stories that are behind their dining experience, from the smallest details of individual dishes to the purpose and ethos of the whole food experience.



Comforting Familiarity

Hearty, traditional comfort foods made sustainably. Meat is locally sourced from small businesses, elsewhere homemade or locally purchased sweets, veg and pastries show that a desire for indulgent food, particularly treats associated with holiday moments, can be fulfilled sustainably.

Implications for the restaurant, bars and cafes sector

Net positivity

IMPACT

- Significantly reduce food waste in the sector in order to help reduce the billions of tonnes of greenhouse gas emissions it causes each year

PROOFPPOINTS

- Donating surplus food o local charity organisations/food redistribution centres.

EXPERIENCE

- Consider how waste reduction initiatives can benefit both the customer and have impact for the greater good? e.g. food apps can also provide an opportunity for new customers to sample your food with minimal financial risk.

Local first

- Engage in local food systems from sourcing to recycling – reinvesting in local economies and environments
- Reduce carbon footprint/food miles by engaging more locally

- Having partnerships with local farmers and food producers
- Growing your own produce

- Celebrate local brands/support local businesses. Focus on the people behind the products and tell their stories. Place the emphasis on quality.
- Engage with and establish productive local-ecosystems that address all areas of the supply chain.

Elevated sustainability

- Create great dining experiences that encourage people to diversify their diets, e.g. climatarian food experiences
- Highlight that local often is better, fresher and healthier

- Having local seasonal menus

- Bringing sustainability into all aspects of the experience – not just online comms, talk about locality and seasonality in the dining experience, highlight the stories of local ingredients, chefs and producers that make your experience unique

Creating enjoyable, sustainable experiences that have impact:

Attractions



Irrespective of market, rewilded gardens, local food partnerships and smarter energy consumption are amongst the top 5 signals that really resonate when it comes to feeling good about choice of attractions.

Proof Points...

Priority initiatives that will positively impact experience of attractions - *identified by the majority of markets.*

Top Priorities

- Gardens which have been rewilded to encourage bird and insect life.
- Having partnerships with local farmers and food producers.
- Using solar power panels or other renewable energy
- Supporting and protecting local cultural traditions and customs (3 out of 5 markets)
- Having access to water fountains to fill up reusable bottles (2 out of 5 markets)
- Sufficient public transport links to the attraction (2 out of 5 markets)

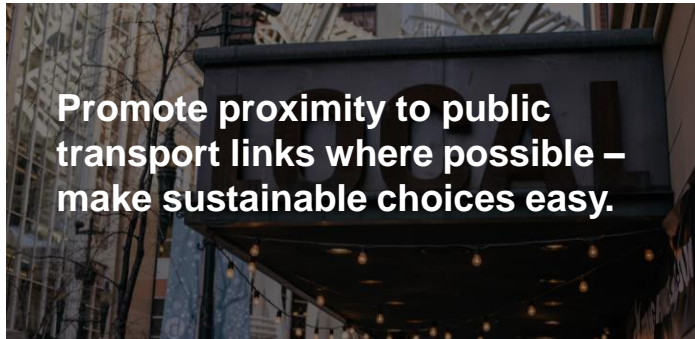
Lower priorities

- Issuing e-tickets
- Outlining its sustainable practices so visitors are aware
- Allowing visitors to carbon offset by providing donation services which support local environmental programmes (4 out of 5 markets)
- Having a 'no plastic bag' policy at gift shops (3 out of 5 markets)
- Limiting the number of visitors per day to avoid over-tourism (2 out of 5 markets)

Attractions: Proofpoints to address today and tomorrow

NOW: Today's must-meet expectations

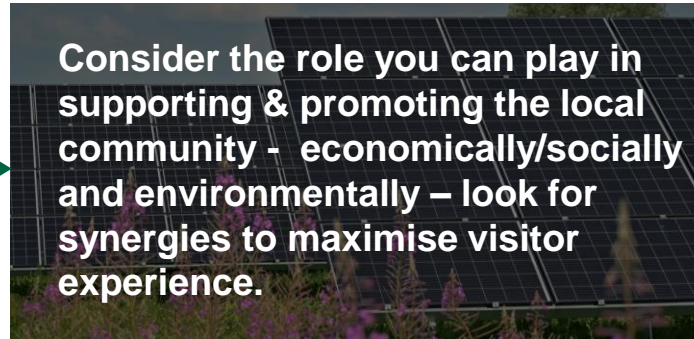
Signals to cue across the consumer experience



Promote proximity to public transport links where possible – make sustainable choices easy.

NEXT: Opportunities to lead the way

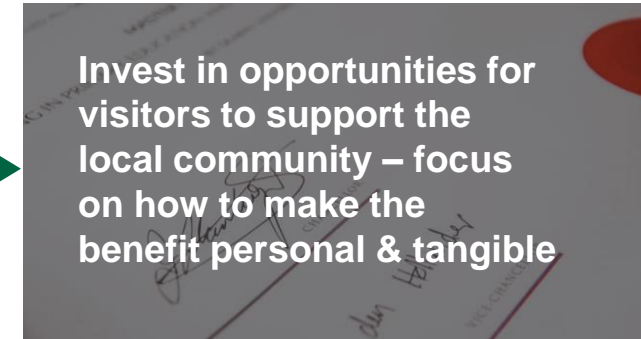
Invest to lead the way & tell emotionally resonant stories



Consider the role you can play in supporting & promoting the local community - economically/socially and environmentally – look for synergies to maximise visitor experience.

FUTURE: Start planning

Start feasibility planning



Invest in opportunities for visitors to support the local community – focus on how to make the benefit personal & tangible

Key Signals

- Having sufficient public transport links

- Rewilded gardens
- Local food partnerships
- Supporting local traditions and customs
- Using solar power
- Attractions adopting carbon offsetting.

- Offering carbon offsetting via donation
- Financially supporting local community groups
- Rewarding those who travel environmentally

Green font = Amongst the top 5 attractions signals that will make people feel good about their experience

Blue font = Over-indexing for eco-actives* in the US

How do I create a future-facing experience that is enjoyable & sustainable?

By creating experiences at attractions that incorporate sustainable feel good factors, alongside experience features that tap into our core sustainable tourism drivers: Immersed in Nature and Culture & Connection.



Driver: Immersed in Nature

Close-Up Encounters

Attractions that facilitate engagement with ecosystems through connections with local wildlife. Relaxed interactions that are fun for all the family, and directly educate younger generations about sustainability through conservation programmes, instilling a sense of stewardship for the natural world. For many, this is also an opportunity to engage with animals and nature that they wouldn't have a chance to otherwise.



Driver: Culture & Connection

Preserved History

Attractions which allow travellers to appreciate the history of structures that have been around for centuries; from both a visual perspective and the stories behind their creation, with a focus on stories that may have been forgotten over time. These sites compel travellers to educate themselves on the heritage of a destination and learn its origins, but also to appreciate the small details and craftsmanship.

Implications for the attractions sector

Diversify education

IMPACT

- Educate travellers on the importance of minority history and embed this into the experience.
- Educate travellers on local customs, rather than use them performatively.

PROOFPOINTS

- Supporting and protecting local cultural traditions and customs

EXPERIENCE

- Encourage appreciation of the history of structures that have been around for centuries – through their visual appeal and the stories of the people who were their custodians through time.
- Partner with local cultural/heritage groups and jointly promote the importance of cultural sustainability through exhibitions/displays/performances

Invest in local environments

- Limit the impact of the attraction on biodiversity – consider how infrastructure and number of travellers may affect the surrounding nature.

- Using solar power panels or other renewable energy
- Gardens which have been rewilded to encourage bird and insect life.

- Celebrate being immersed in and connected to nature. Create walking trails that will appeal to visitors. Provide areas/seating for quiet contemplation to promote mental wellness. Actively promote 'slow tourism' trails by partnering with other complimentary attractions in the area.

Invest in local people

- Consider the impact of the attraction on locals their authentic culture.

- Having partnerships with local farmers and food producers.

- Partner with local food brands/supporting local businesses and include the positive impact on food miles in your story telling. Showcase local food/home grown food in restaurants/cafes in historic houses or museums.

Creating enjoyable, sustainable experiences that have impact:

Activities



Providing a seamless, frictionless experience will resonate. Important to look for synergy between the activity itself, along with the options to access it and experience it.

Proof Points...

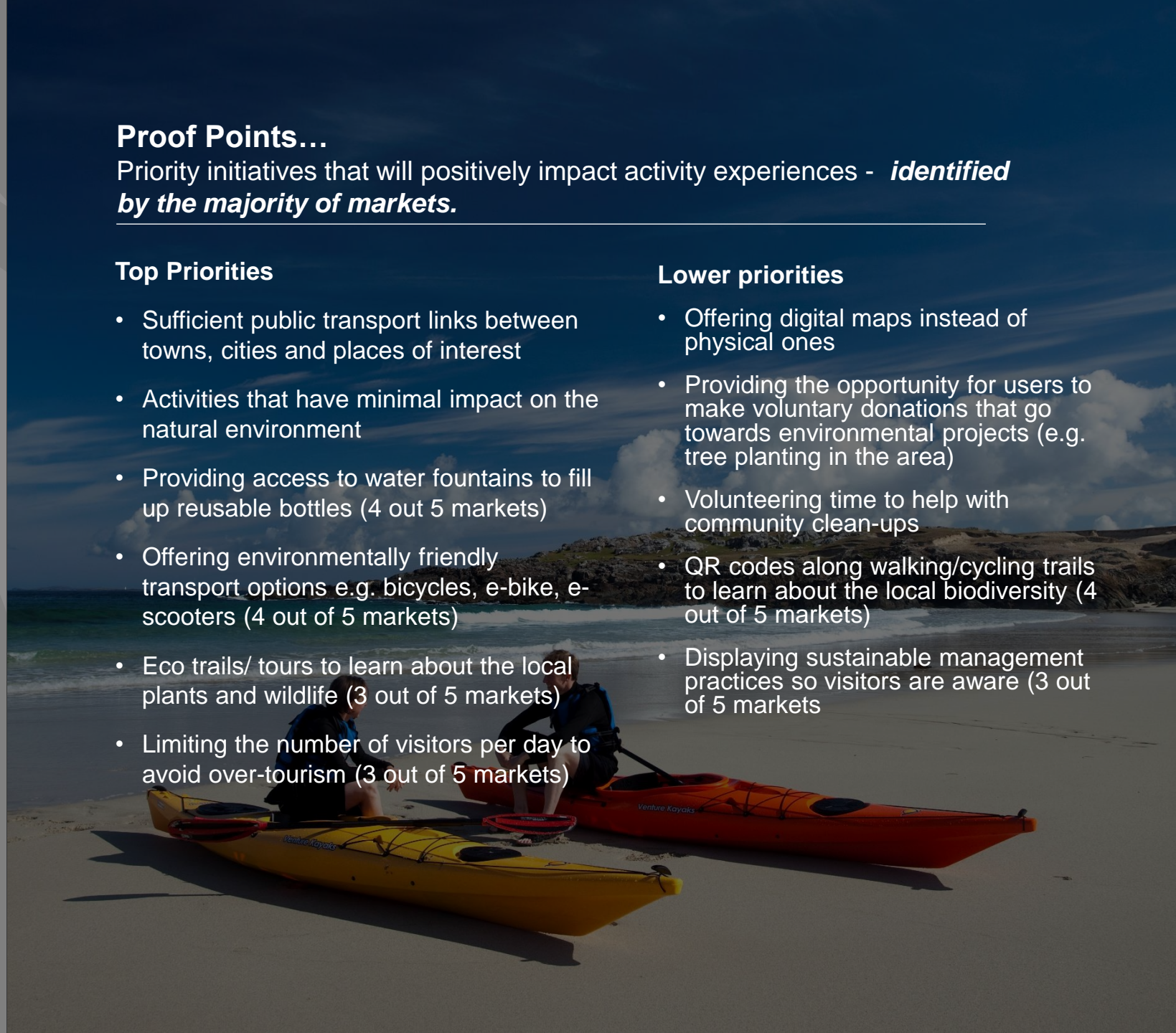
Priority initiatives that will positively impact activity experiences - **identified by the majority of markets.**

Top Priorities

- Sufficient public transport links between towns, cities and places of interest
- Activities that have minimal impact on the natural environment
- Providing access to water fountains to fill up reusable bottles (4 out of 5 markets)
- Offering environmentally friendly transport options e.g. bicycles, e-bike, e-scooters (4 out of 5 markets)
- Eco trails/ tours to learn about the local plants and wildlife (3 out of 5 markets)
- Limiting the number of visitors per day to avoid over-tourism (3 out of 5 markets)

Lower priorities

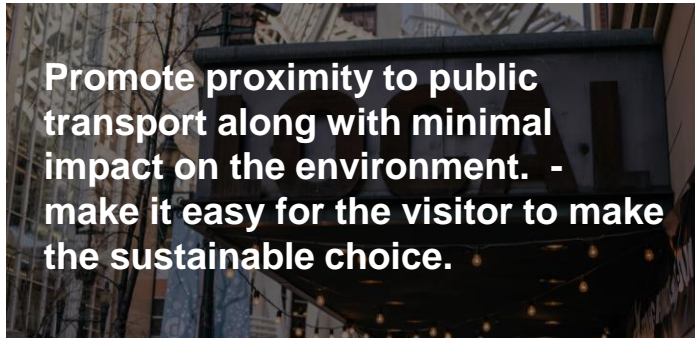
- Offering digital maps instead of physical ones
- Providing the opportunity for users to make voluntary donations that go towards environmental projects (e.g. tree planting in the area)
- Volunteering time to help with community clean-ups
- QR codes along walking/cycling trails to learn about the local biodiversity (4 out of 5 markets)
- Displaying sustainable management practices so visitors are aware (3 out of 5 markets)



Activities: Proofpoints to address today and tomorrow

NOW: Today's must-meet expectations

Signals to cue across the consumer experience



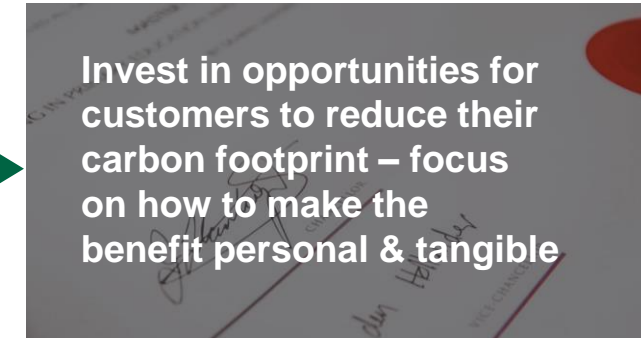
NEXT: Opportunities to lead the way

Invest to lead the way & tell emotionally resonant stories



FUTURE: Start planning

Start feasibility planning



Key Signals

- **Sufficient public transport links between areas.**
- Activities that have minimal impact on the natural environment
- Educational eco trails/tours

- **Offering environmentally friendly transport options (eg e-bikes).**
- **Avoiding over tourism**

- Partnerships with local businesses.
- Adopts carbon offsetting
- Provides electric/hybrid car hire
- Digital maps
- Displays sustainable management practices
- QR codes along trails.
- Voluntary donations for environmental projects.
- Volunteer to help with community clean up.

Green font = Amongst the top 5 activities signals that will make people feel good about their experience

How do I create a future-facing experience that is enjoyable & sustainable?

By creating experiences during activities that incorporate sustainable proof points, alongside design cues that tap into 3 core sustainable travel drivers: Immersed in Nature, Culture & Connection and Mental Wellbeing.

Driver: Culture & Connection



Collective Missions

Sustainable activities that focus not only on having a positive impact, but on making connections with like-minded people. Whether learning new skills from local crafters and creators, or actively contributing positively to the local environment through nature clean-ups, sharing the task makes it better for everyone.

Driver: Immersed in Nature



Nature's Challenge

This is adventuring as nature intended - hiking, biking, kayaking in nature's most impressive, raw landscapes, with utmost respect for the environment, leaving no trace behind.

Driver: Immersed in Nature



Foraged Goodness

People are educating themselves and others about food systems and the processes of growing food sustainably. Learning about the rhythms of nature and the role this plays in feeding people is an important experience that can instill new habits that are carried into everyday life.

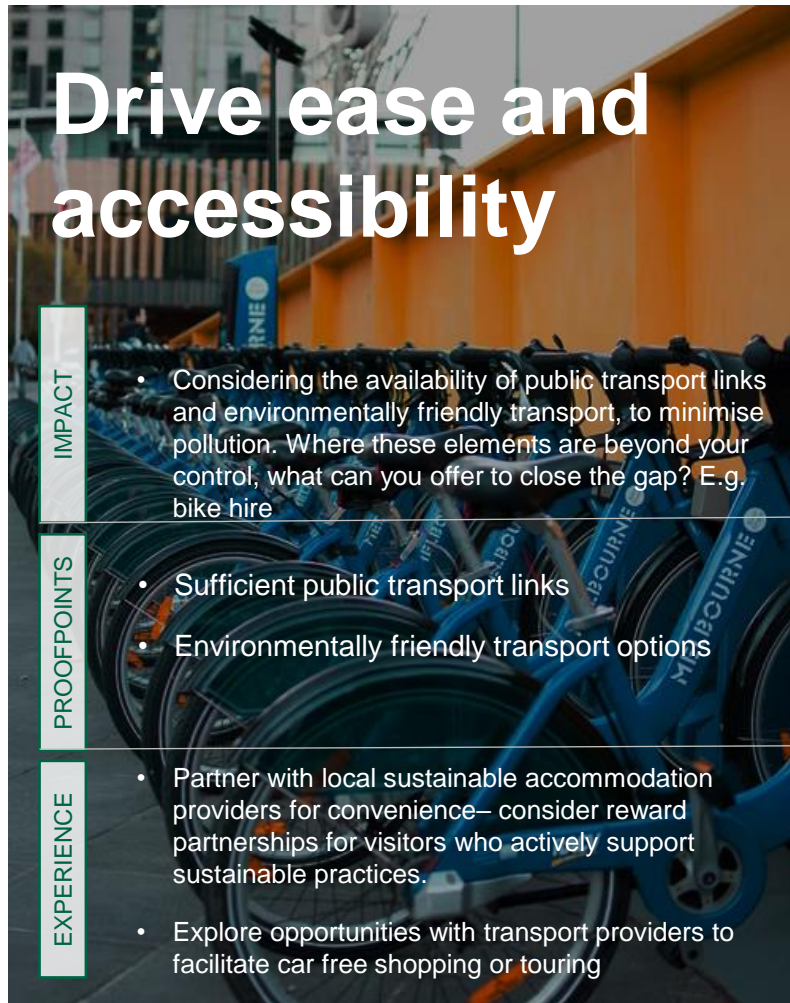
Driver: Mental Wellbeing



Sustainable Self-Care

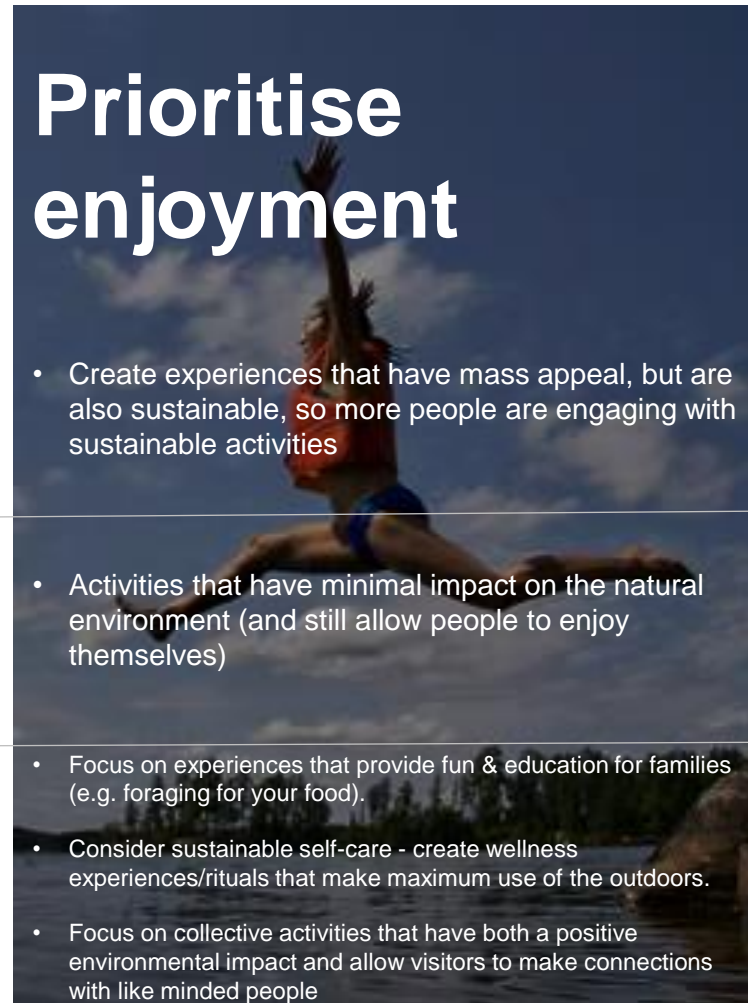
Inclusive, and environmentally conscious self-care that's good for the people and the planet. These activities are about radical prioritization of own wellbeing – but doing it in a way that is aligned with own environmental and social values. Often set in natural environments.

Implications for the attractions sector



Drive ease and accessibility

- IMPACT**
 - Considering the availability of public transport links and environmentally friendly transport, to minimise pollution. Where these elements are beyond your control, what can you offer to close the gap? E.g. bike hire
- PROOFPOINTS**
 - Sufficient public transport links
 - Environmentally friendly transport options
- EXPERIENCE**
 - Partner with local sustainable accommodation providers for convenience– consider reward partnerships for visitors who actively support sustainable practices.
 - Explore opportunities with transport providers to facilitate car free shopping or touring



Prioritise enjoyment

- Create experiences that have mass appeal, but are also sustainable, so more people are engaging with sustainable activities
- Activities that have minimal impact on the natural environment (and still allow people to enjoy themselves)
- Focus on experiences that provide fun & education for families (e.g. foraging for your food).
 - Consider sustainable self-care - create wellness experiences/rituals that make maximum use of the outdoors.
 - Focus on collective activities that have both a positive environmental impact and allow visitors to make connections with like minded people



One with the ecosystem

- Limiting environmental damage caused by development of new activities
 - Ensuring the activities on offer are sympathetic to the local eco system and not a hindrance
- Educational eco trails and tours
- Offer local community led trails/walks that are off the beaten track.
 - Create a sense of personal challenge through adventure based activities that are at one with nature.

Key Learnings

Key Learnings

1

While tourism audiences are more sustainability-minded than the general public, they **don't yet know what sustainable travel means**.

This, however, can change at an unanticipated and fast pace, so the industry must lead the way and be prepared for the tourist of the future who demands sustainable choices.

2

Personal **enjoyment and experience** is crucial to sustainable tourism. Brands and providers have an opportunity to speak to sustainability-related **travel motivations** to do with experiencing and immersing in nature, connecting with local culture and community authentically, and seeking personal mental wellbeing.

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In addition, there is an **emergent expectation** for sustainably minded tourists that they and providers should

- Minimise any negative impact on the environment
- Make sustainable choices as easy as possible
- Particularly benefit the local community and economy, through for example partnerships

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Providers need to think about creating **sustainable experiences holistically**, considering.

- The ways in which they can have the biggest genuine **impact**
- The right **proofpoints** to call out to consumers to communicate sustainability
- The **experiences** they create to make sustainability enjoyable and immersive

Thank You

Fáilte Ireland



Appendix



Methodology – Quantitative component



WHO?

- Markets: ROI, UK, DE, US & Sweden
- N=800 per market
- ROI = All 18+, taken a SB or holiday in Ireland since Jan 2019 and intend to do so in N2 years
- All other markets = 18+, travelled abroad in P3 yrs and intend to travel abroad in N2 yrs



WHEN?

3rd – 22nd December 2021



HOW?

Ad hoc online study
15 minute Interview length

MaxDiff trade off analysis included to understand the sustainability initiatives/signals that are most/least likely influence a positive holiday experience across 4 key categories:

- Accommodation
- Restaurants/bars/cafes
- Activities
- Attractions



ANALYSIS FOCUS

Key focus on the following groups:

By market;

- ROI
- UK
- US
- DE
- SW

Life-stage;

- <45 Unconstrained adults
- >45 Unconstrained adults
- Families

Eco Segment

- Actives
- Believers
- Considerers
- Dismissers

Methodology – Cultural Insight & EVA Visual Analytics

Leading edge brands, influencers and social media content from early adopters of sustainable tourism was analysed to understand the most emergent, future-facing themes around sustainable tourism

DISCOVER

- Foundational insights - data dig and literature review from multiple sources incl. learnings from the Kantar sustainability practice.
- Cultural Scoping – assessing the most emergent brands and influencers from across the tourism industry and how they are leading sustainable tourism.

GATHER

- Gathering 17,000+ pieces of User Generated Content through our AI platform.
- Identifying key hashtags to tap into sustainable tourism and how people are expressing it in social media, e.g.
 - #SustainableTravel
 - #ResponsibleTourism
 - #EcoHotel
 - #GreenTravel

CLUSTER

- Enhanced Visual Analytics (EVA) tool clusters imagery through AI Semiotic analysis to uncover consistent visual themes that are emerging from the content
- These clusters are then grouped into territories – groups of clusters with shared underlying drivers that tie them together.

DECODE

- Expert analysis to understand how the visual codes identified relate to broader cultural themes and shifts around sustainable travel, what their meanings are, and what they tell us about the types of experiences that are desirable, and aspirational in the sustainable travel space.

There are four distinct sustainability profiles.

Understanding where consumers are on their sustainability journey can help us tailor products/experiences that will resonate with them



Active

The Actives are **much more likely to believe that they can make a real difference** through their actions.

They think about their footprint more broadly. They are careful about food waste and water usage. They recycle. They buy free-range and certified sustainable. They will not buy an outfit for a single occasion.



Believers

Believers are heavily influenced by social factors, listing celebrities as having a strong influence over their purchasing decisions.

Similar to the Actives, this group is aware of the impact of their actions. However, their focus is more around what they purchase.



Considerers

Considerers are less likely to take personal responsibility for sustainability issues and don't feel they can make a difference through their choices.

They are careful about what products they buy – they look for signposting like Fair Trade or no animal cruelty. They are open to trying vegetarian diets and are considering switching to green energy.



Dismissers

Dismissers are characterised by their apathy to all things sustainable.

Whilst Dismissers do engage on the basic – recycling, carrying reusable bags, and trying not to waste food – they are not yet showing an awareness of bigger lifestyle changes. They aren't interested in changing their diet or buying sustainable, free-range, no cruelty products.

MaxDiff Analysis

MaxDiff helped to identify the key sustainability signals that are most likely to make tourists feel good about their choices, across four key categories: Accommodation, Restaurants/Bars/Cafes, Activities and Attractions.

WHY MAX DIFF:

To determine which elements are most likely to make holidaymakers feel good about their choice of accommodation, restaurant/ bar/ cafe, activities or attractions.

MaxDiff forces the respondent to make trade off's, as in real life, deciding which sustainability initiative is most likely and least likely to make them feel good about their experience.

RESULTS OF MAX DIFF

MaxDiff shows which elements scored best and gives the distance between the ranks, allowing us to judge relative importance.

It gives a ranking on which element is most relevant at total level, as well as amongst key sub groups.

MAXIMUM SIMPLICITY

The task is very easy from a respondent point of view:

No rating scales are involved, just simple choices.

This exercise is repeated several times with different items shown on each screen.

HOW IT IS MANAGED

We showed 4 items on each screen and asked respondents to select the element that would be most likely and least likely to make them feel good about their experience. **All framed in the context of a sustainable holiday.**

Which of these elements would be most likely to influence your decision on which destination to choose? And which would be least likely to influence your decision on what destination to

Most Likely		Least Likely	
<input type="radio"/>	(A) Adopts Carbon offsetting	(A)	<input checked="" type="radio"/>
<input type="radio"/>	(B) Certified sustainable	(B)	<input type="radio"/>
<input type="radio"/>	(C) Local food partnerships	(C)	<input type="radio"/>
<input checked="" type="radio"/>	(D) Reduced water consumption	(D)	<input type="radio"/>