



Fáilte Ireland
Exploring the attitudes of holidaymakers
towards landscape and natural
environment

September 2009



Presentation outline

Research objectives and approach

Part 1 - General decision making

Choosing a holiday

Accommodation and travel

Information seeking behaviour

Part 2 - Landscape and the natural environment

Associations and importance

Enjoying the landscape and motivations

Thinking about the Irish landscape

Part 3 - Exploring eco tourism options

Awareness and engagement in eco tourism

Exploring potential eco tourism options

Paying more for eco tourism options

Conclusions



Research objectives

- Understand the range of **elements that make up our landscape** in the minds of consumers
- Identify the **importance of landscape** in motivating holidaymakers
- Identify the elements of landscape that resonate most strongly with consumers
- Identify holidaymakers' **associations with the Irish landscape**
- Explore the sources of **information used** to find out about the landscape
- Understand how holidaymakers actively or passively **enjoy the landscape / natural environment**
- Understand holidaymakers' awareness and **engagement in eco tourism**
- Assess holidaymakers **likelihood to consider eco tourism** options
- Understand holidaymakers **willingness to pay** more for eco tourism options
- Understand holidaymakers' general **involvement with the environment** on a day to day basis

- **Phase 1: Fáilte Ireland kick off workshop** →
 - Clarification of research scope
- **Phase 2: Consumer interviews**
Tour operator interviews →
Eco tourism provider interviews
 - Associations with landscape
 - Ireland as a destination
 - Attitudes towards eco tourism options
 - Challenges for eco tourism providers
- **Phase 3: Online survey across holidaymakers / potential visitors who would consider Ireland as a destination** →
 - Choosing a holiday destination
 - Primary decision making factors
 - Landscape associations overall and in relation to Ireland
 - Enjoyment of the landscape
 - Consideration of eco tourism options
 - Willingness to pay more for eco tourism options

When looking at the research findings differences are highlighted where they occur by market (Ireland, UK, France, Germany, USA, Denmark & Netherlands), demographics and whether the respondents visited Ireland.



Sample overview

- **7092 holidaymakers interviewed across seven countries – Ireland, GB, France, Germany, Netherlands, Denmark and USA**
- **Nationally representative sample (age/gender/region) in each country**
- **All holidaymakers must have said they would consider Ireland as a destination**
- **70% were aware of at least one of the terms ‘green tourism’ ‘eco tourism’ ‘sustainable tourism’**
- **15% had engaged in some type of eco tourism**
- **20% would pay more for green tourism alternatives**



The importance of landscape and natural environment across countries – the industry perspective...*but supported by consumer research*



Netherlands

- Dutch holidaymakers are extremely sensitive to cost – an activity must add value
- They prefer unguided touring, freedom to explore
- They like to think of themselves as interested in the environment however there tends to be a contradiction between attitude and behaviour
- Key motivations for Dutch holidaymakers visiting Ireland are – nature and natural landscape and the people
- Irish culture is considered unique and quite different to their own
- Active pursuits based on nature would appeal in the minds of tour operators however green or eco specific propositions would not appeal.



Great Britain

- Few demands with respect to landscape etc, their key motivation – to be relaxed and refreshed after their break
- Not as keen on conducting research for themselves – want to be told what to do
- Come for the people rather than the landscape
- Don't associate Ireland with having a coastline
- Enjoy passive recreation rather than outdoor pursuits
- Expectation is that Ireland is less developed than it is



The importance of landscape and natural environment across countries – the industry perspective...*but supported by consumer research*



Germany

- Germany is one of the most ecology minded countries in the world
- They want untouched landscapes and authentic experiences
- Primary motivation for visiting Ireland is beautiful landscape
- Very high expectations when they come to Ireland – as a result have shown some disappointment with our natural environment
- Demand definitions of eco tourism – what is meant, and the benefits.
- Respect standards, particularly European wide



France

- The French consider natural environment to be a major asset
- They want to interact with the environment when on holiday rather than more passive activities such as driving
- Presentation (interpretation/guides) of areas / activities is very important – poor interpretation giving the impression sometimes that we don't care
- They want to hear/find out about the hidden Ireland
- Generally believe that Ireland is well preserved – so respond very negatively to pollution etc
- Like to shop locally and love markets overseas, and at home



The importance of landscape and natural environment across countries – the industry perspective...*but supported by consumer research*



USA

- More interested in history than landscape when it comes to Ireland
- Beautiful landscape is the backdrop that they expect – but in itself it is of less importance
- Countries such South America, Jungle, and rainforests in terms of landscapes spring to mind when they think about eco tourism.
- Increasingly cost and litter sensitive

Consumer research indicated greater interest in landscape and natural environment in its own right

Part 1
**General holidaymaker decision
making**

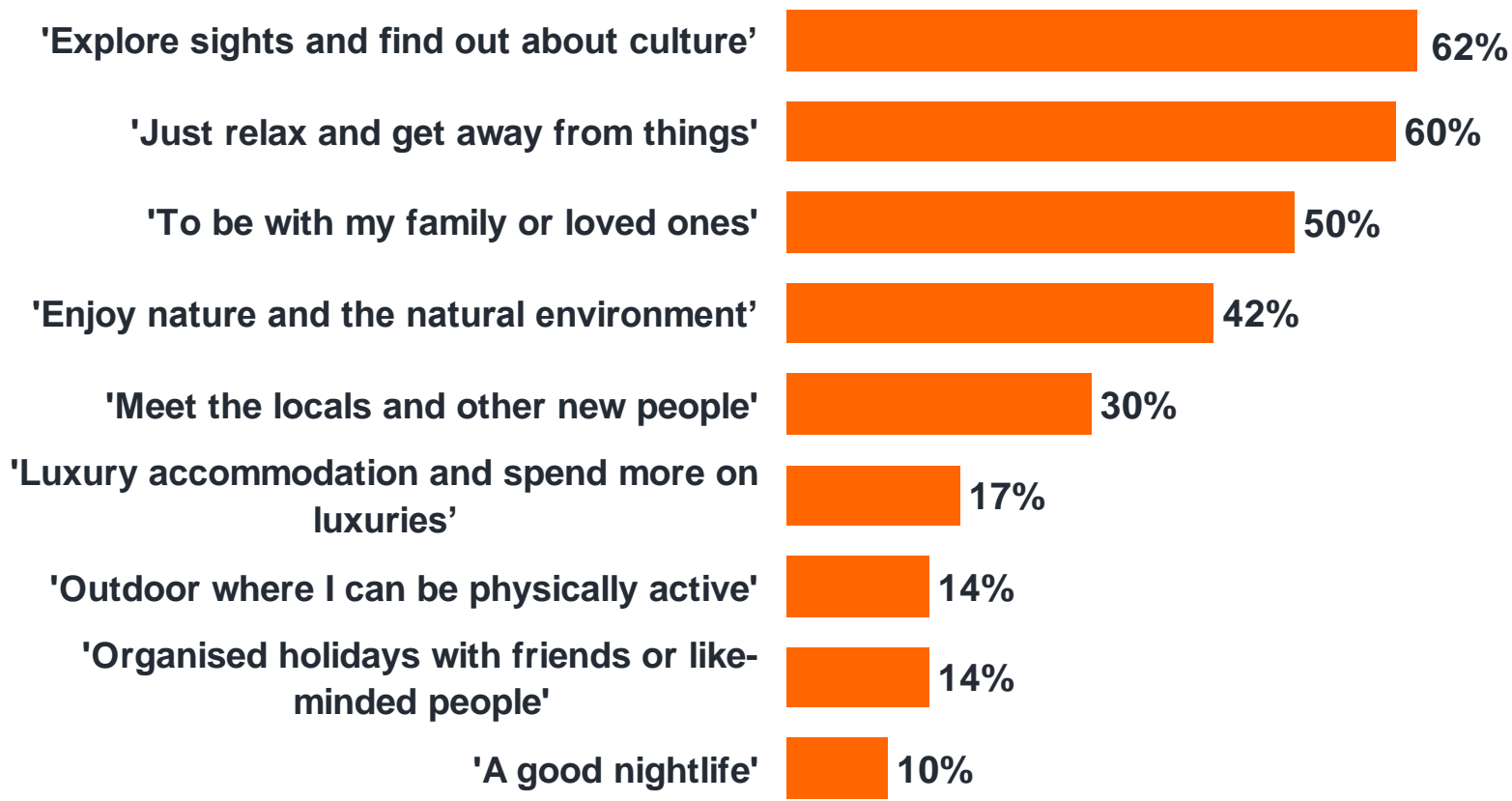
Choosing a holiday

Holiday types



How do our holidaymakers think about travel?

Looking at holidaymakers overall we see that the main motivation when thinking about travel is to explore sights and culture, followed by just getting away from it all, just over 40% of holidaymakers stating that they liked especially to enjoy nature and the natural environment

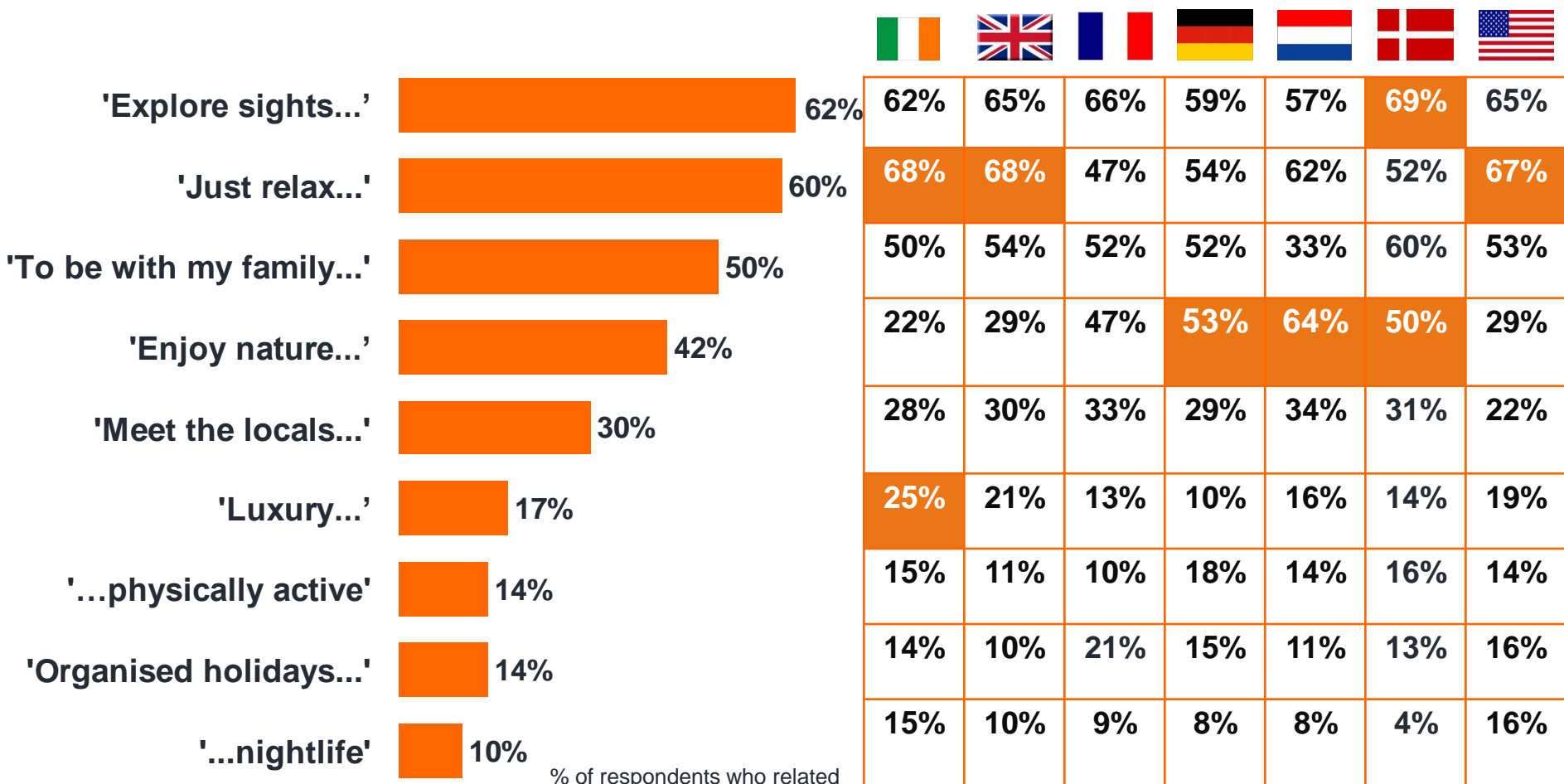


% of respondents who related to each type of holiday



How do our holidaymakers think about travel?

If we look across markets we see that more holidaymakers from Germany and the Netherlands than anywhere else state they like to enjoy nature, those from Ireland, the UK and the USA being more likely to say they just want to relax, Irish holidaymakers also being most likely to say they want to holiday in luxury.



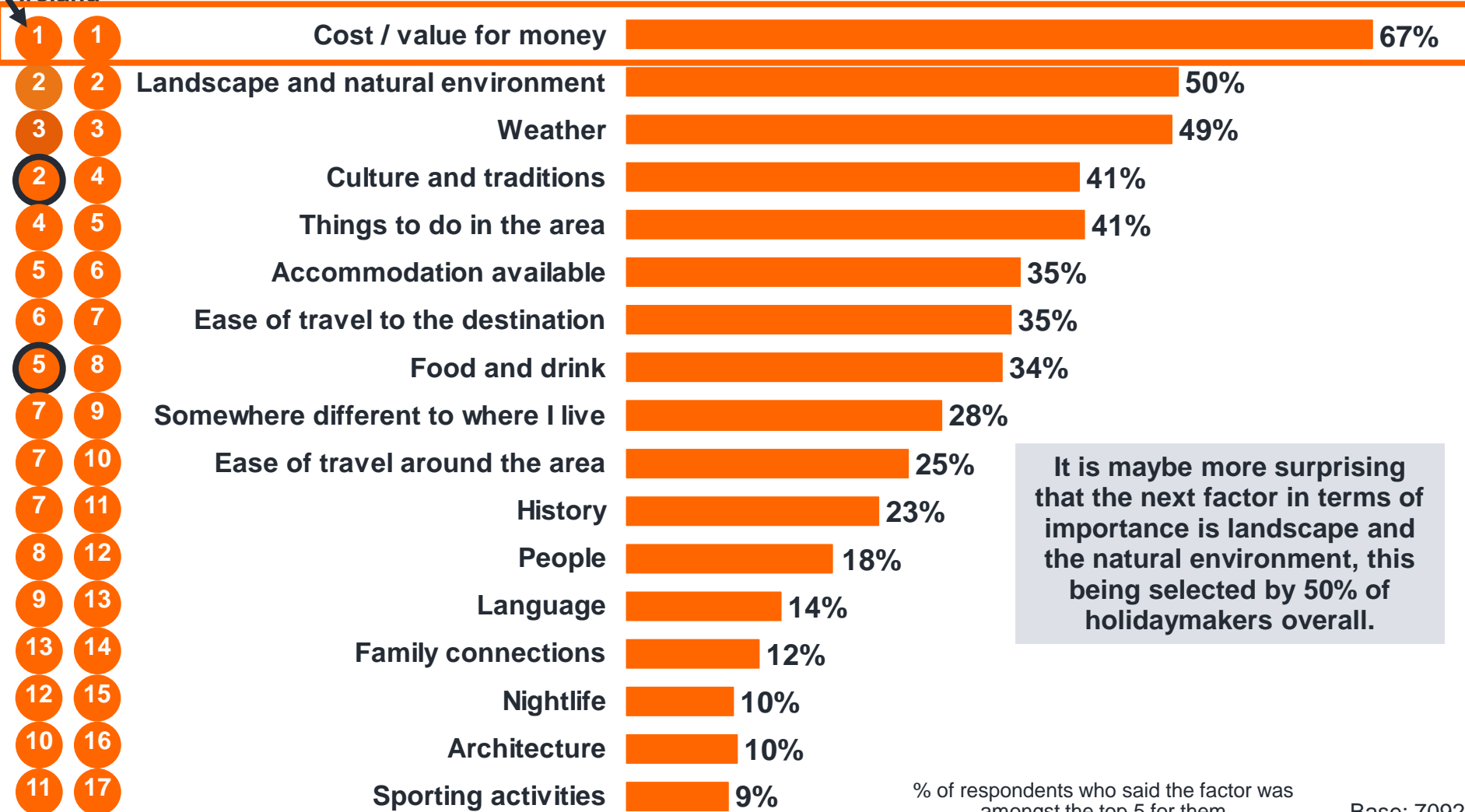
Decision making factors



Top factors when choosing a holiday destination

Those who have visited Ireland

While the proportion of holidaymakers stating that cost/value for money is one of the top factors when choosing a holiday destination this may have been exaggerated given the current economic climate, it was selected by almost 70% of our sample of 7092 holidaymakers.



It is maybe more surprising that the next factor in terms of importance is landscape and the natural environment, this being selected by 50% of holidaymakers overall.

% of respondents who said the factor was amongst the top 5 for them



Top factors when choosing a holiday destination

Here we see that cost is particularly important for the Irish and US markets, weather also being relatively more important for Irish travellers. This factor, together with Irish travellers holding ease of travel to the destination as more important highlights the importance of the home market. For those travelling from Denmark and the US things to do in the area appear more important.





		Ireland	UK	France	Germany	Netherlands	Denmark	US
Cost / value for money	67%	77%	74%	60%	49%	70%	62%	77%
Landscape & environment	50%	27%	36%	67%	63%	66%	54%	34%
Weather	49%	57%	57%	40%	46%	55%	48%	40%
Culture and traditions	41%	33%	34%	44%	43%	50%	46%	34%
Things to do in the area	41%	44%	41%	24%	27%	42%	54%	56%
Accommodation available	35%	39%	44%	39%	35%	34%	20%	36%
Ease of travel to the destination	35%	48%	39%	38%	26%	22%	31%	37%
Food and drink	34%	35%	42%	23%	42%	27%	36%	32%
Somewhere different to	28%	24%	27%	43%	31%	16%	32%	24%
Ease of travel around the area	25%	28%	28%	26%	30%	15%	20%	30%

% of respondents who said the factor was amongst the top 5 for them



Holidaymaker priorities by market

In the rankings, landscape rises to first place for holidaymakers from France and Germany, and those most likely to say they will consider Ireland as a destination in coming years. Across markets however landscape has a considerably lesser impact on those from Ireland and the UK.

	Total								Visited Ireland	Most likely
Cost / value for money	1	1	1	2	2	1	1	1	1	2
Landscape & natural environment	2	9	7	1	1	2	2	6	2	1
Weather	3	2	2	5	3	3	3	3	3	3
Culture & traditions	4	7	8	3	4	4	4	6	2	4
Things to do in the area	5	4	5	9	9	5	2	2	4	5

Accommodation and travel



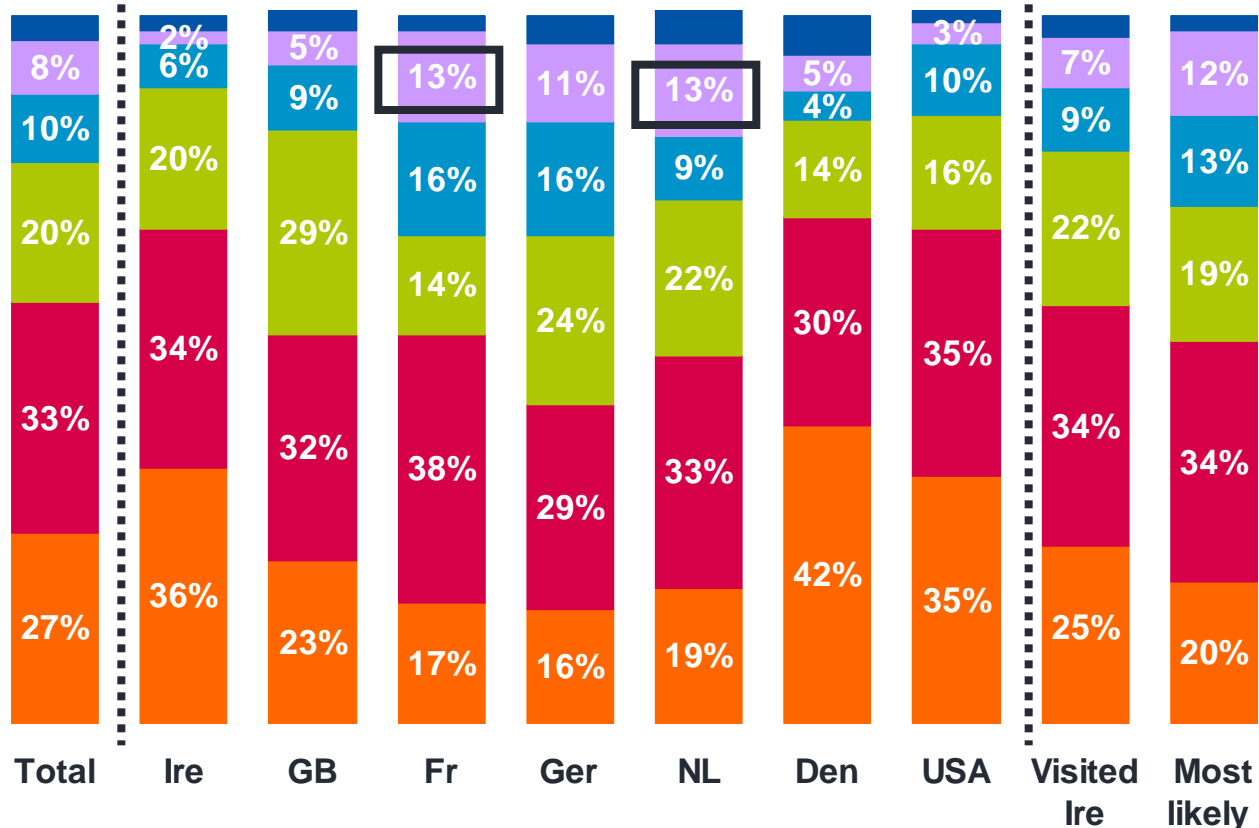
Types of accommodation desired by holidaymakers

While city based accommodation is the preference for those from Denmark and Ireland, it is accommodation in a local town that appears to be most popular amongst holidaymakers across markets. French and Dutch holidaymakers appear to have the strongest preferences for accommodation set deep in the country, although this is still low at 13%.

rural

- Other
- Deep in the country where the focus is on the environment
- In the countryside, but close to main routes
- Outside a local town, but close to places to eat etc
- A local town, with local amenities, where I can base myself for a few days
- A city / large town

urban



% of respondents who prefer each accommodation type



How do holidaymakers like to travel around

Organised / group travel appears to hold very little appeal across markets, holidaymakers being most inclined to travel independently with some locally guided tours, just stopping off at places along the way also being popular. This coincides with the appeal of local tours identified when we looked at enjoyment of landscape specifically.

Less organised
↑
More organised

Other

I do not like to travel around much

Independently, stopping off at places

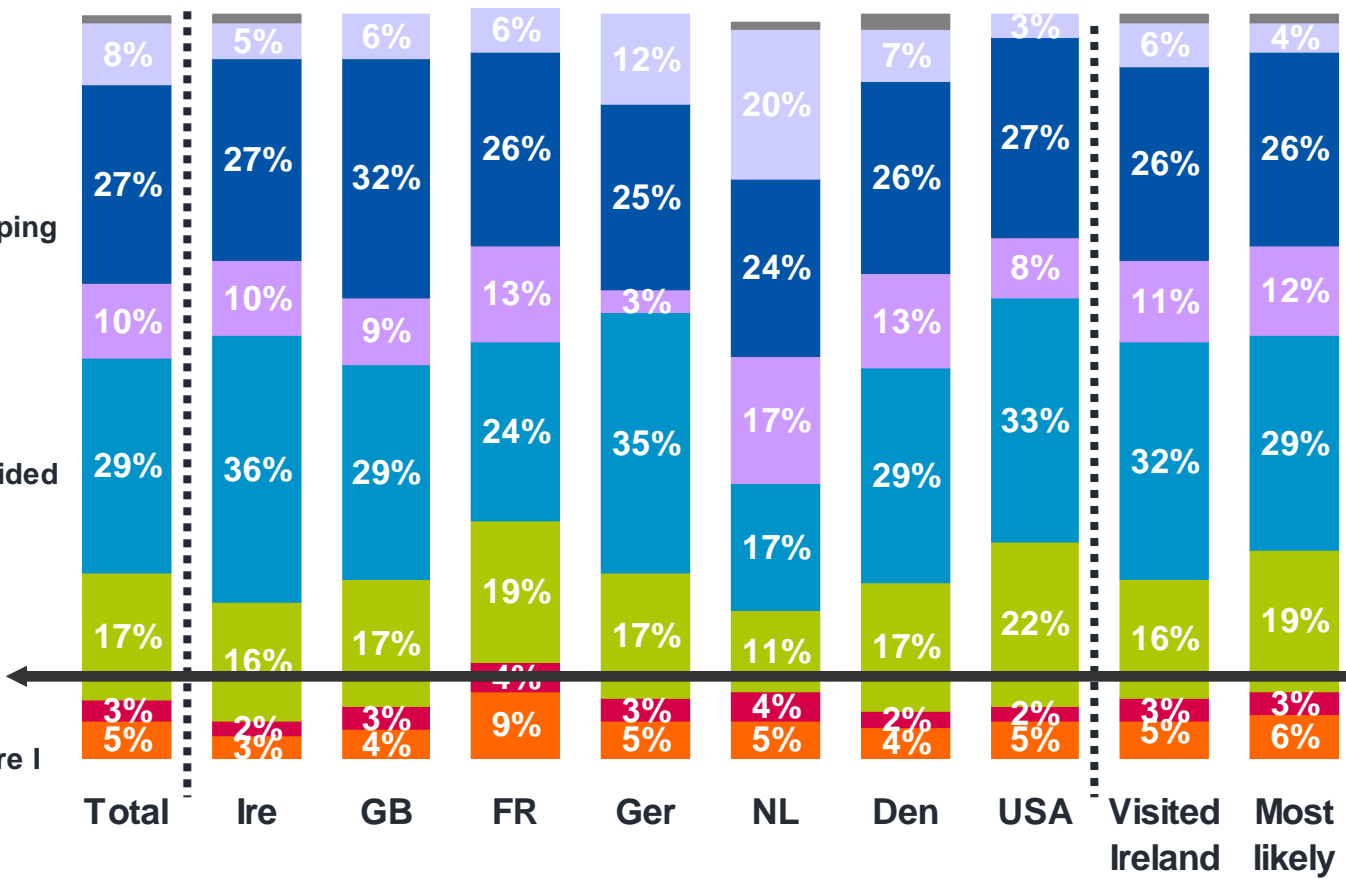
independently with itinerary

independently and some locally guided tours

A mixture

Organised tours at destination

Organised tour before I leave



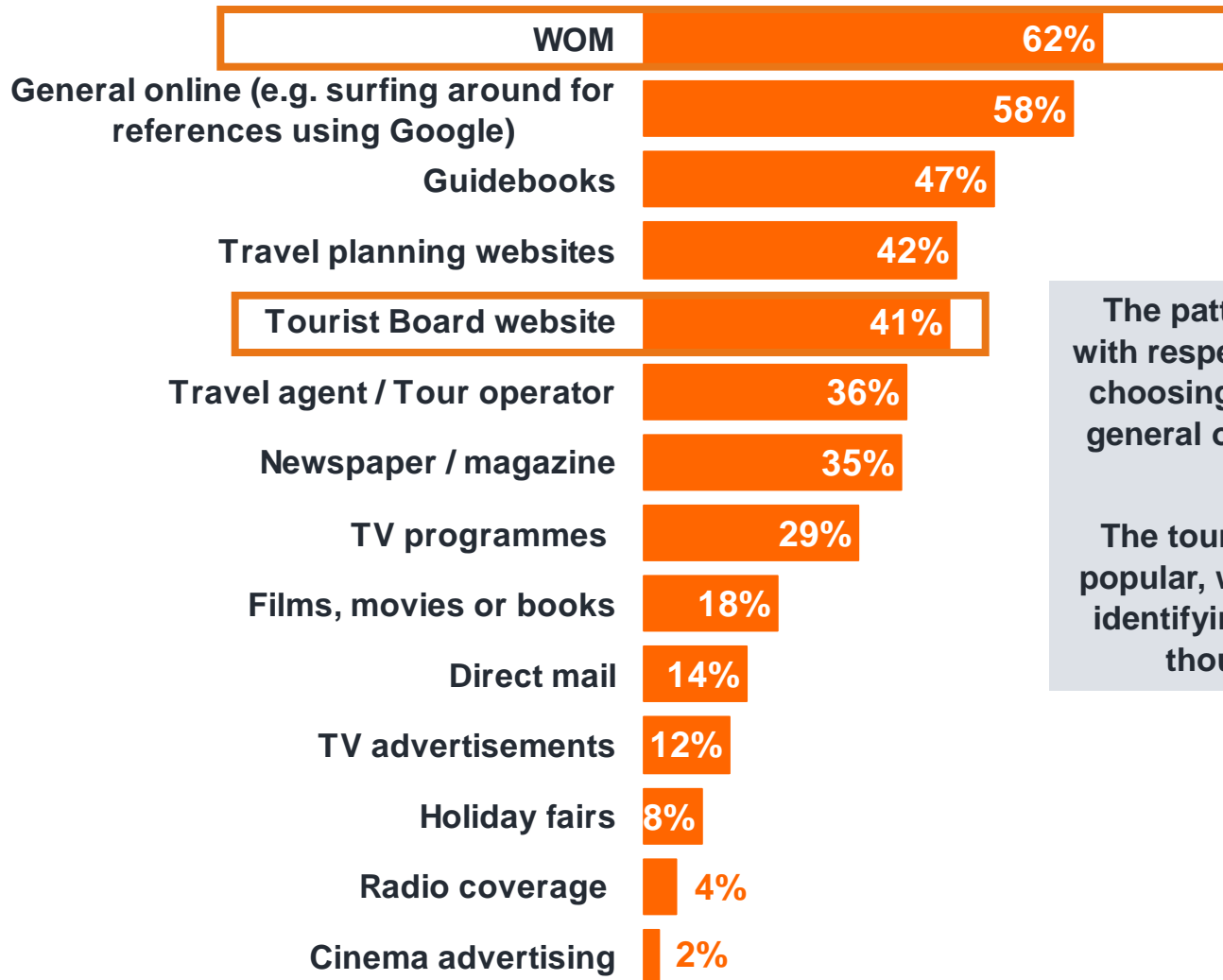
Base:7092

% of respondents who prefer each type of travel

Information seeking behaviour



What is triggering travellers' thoughts about a destination?



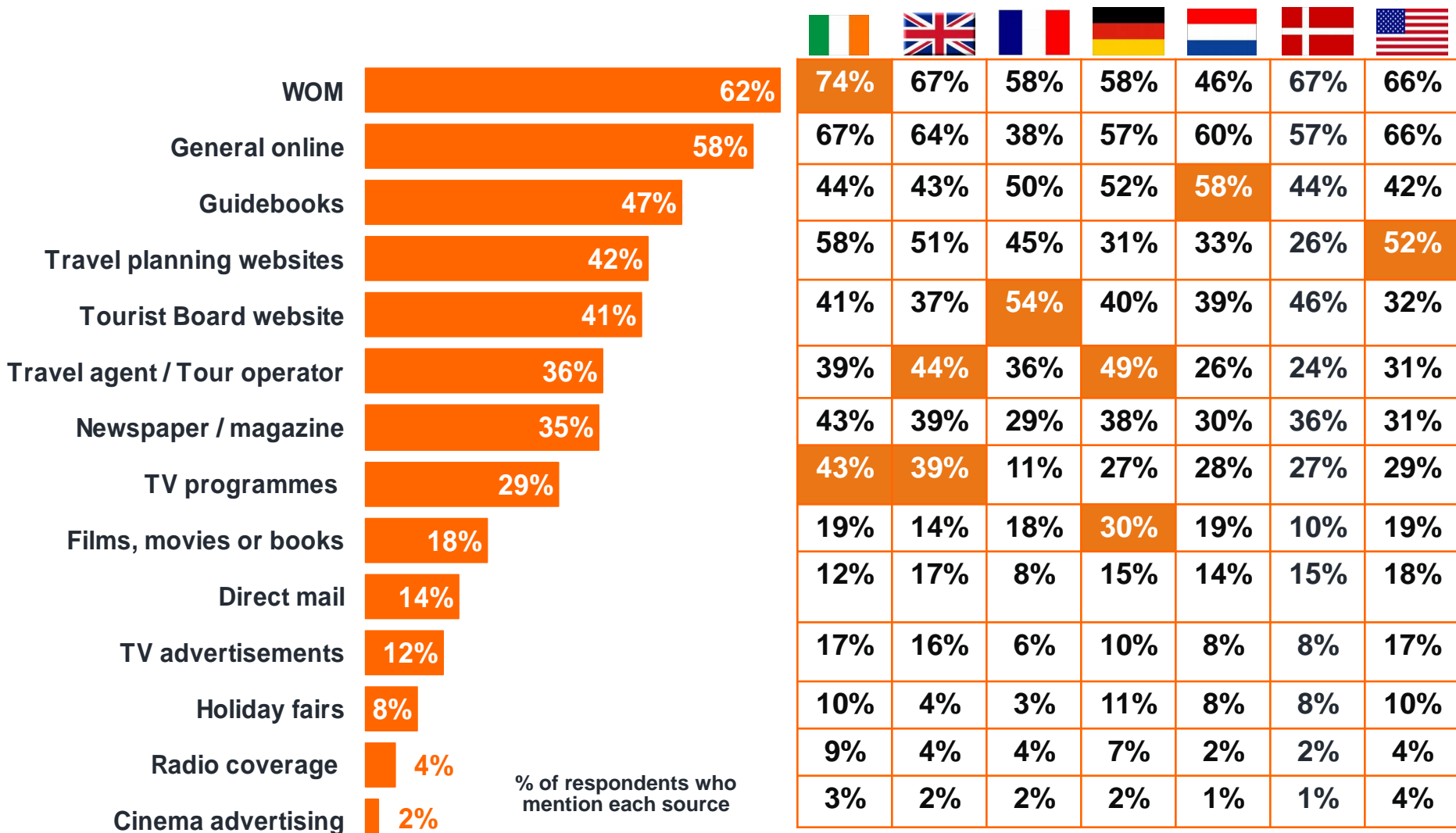
The pattern of recent years continues with respect to information seeking when choosing a destination, word of mouth, general online and guidebooks being at the top.

The tourist board website also proves popular, with over 40% of holidaymakers identifying it as influential in triggering thoughts about a destination.



What is triggering travellers' thoughts about a destination?

While WOM dominates for the Irish traveller, for the French the Tourist Board website is more important, guidebooks being key for the Dutch, TV programmes being relatively more important for the Irish and British holidaymaker, the TV programme 'Coast', perhaps being an example.

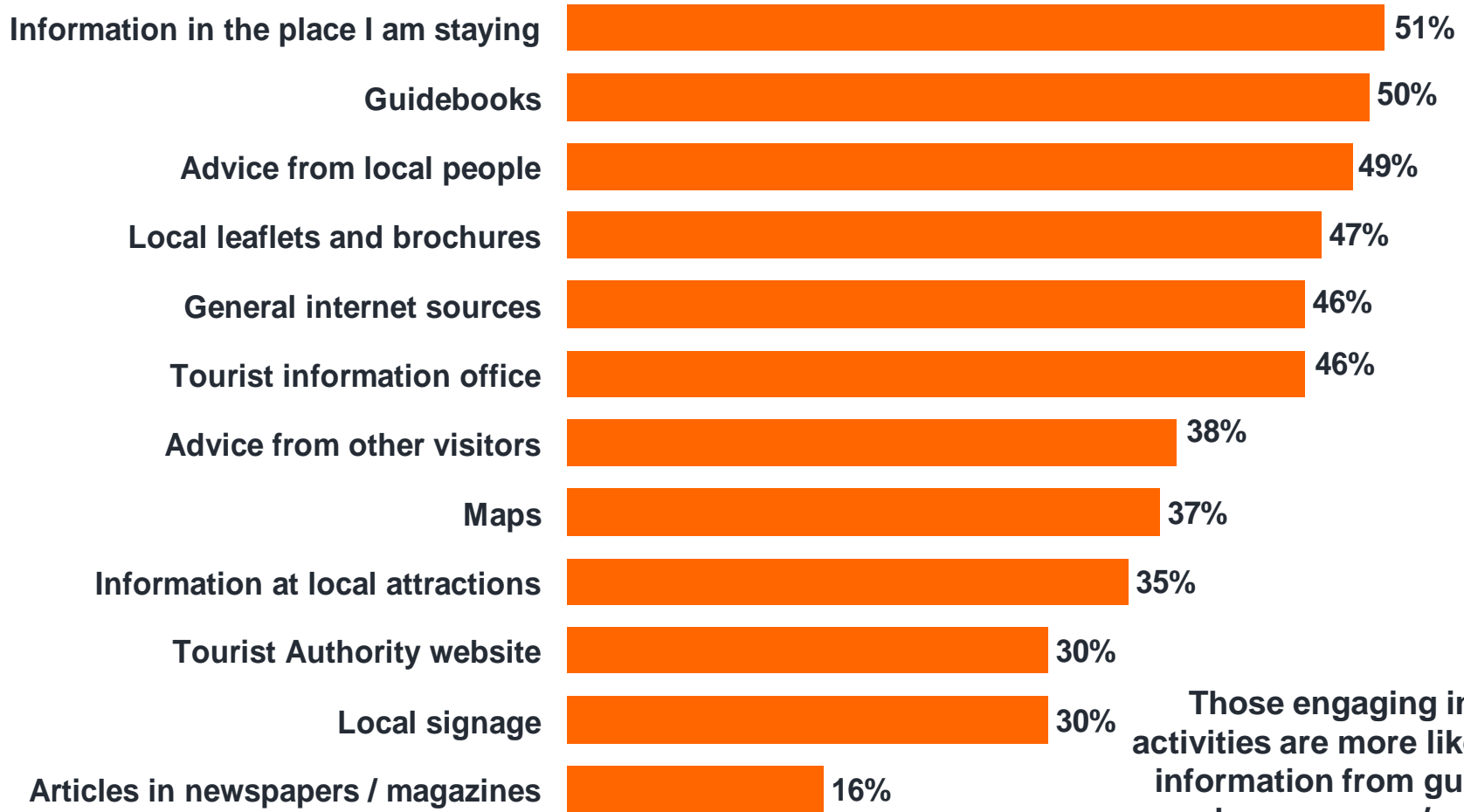


How different is behaviour when holidaymakers are seeking information about what to do in the natural environment at the destination?



How do holidaymakers seek information about the environment when they are at their destination

Guidebooks and word of mouth continue to have an important role *at the destination*, particularly in seeking information about the environment with information where holidaymakers are staying being particularly widely used.










Those engaging in green activities are more likely to seek information from guidebooks and newspapers/magazines

25

% of respondents who mention each source

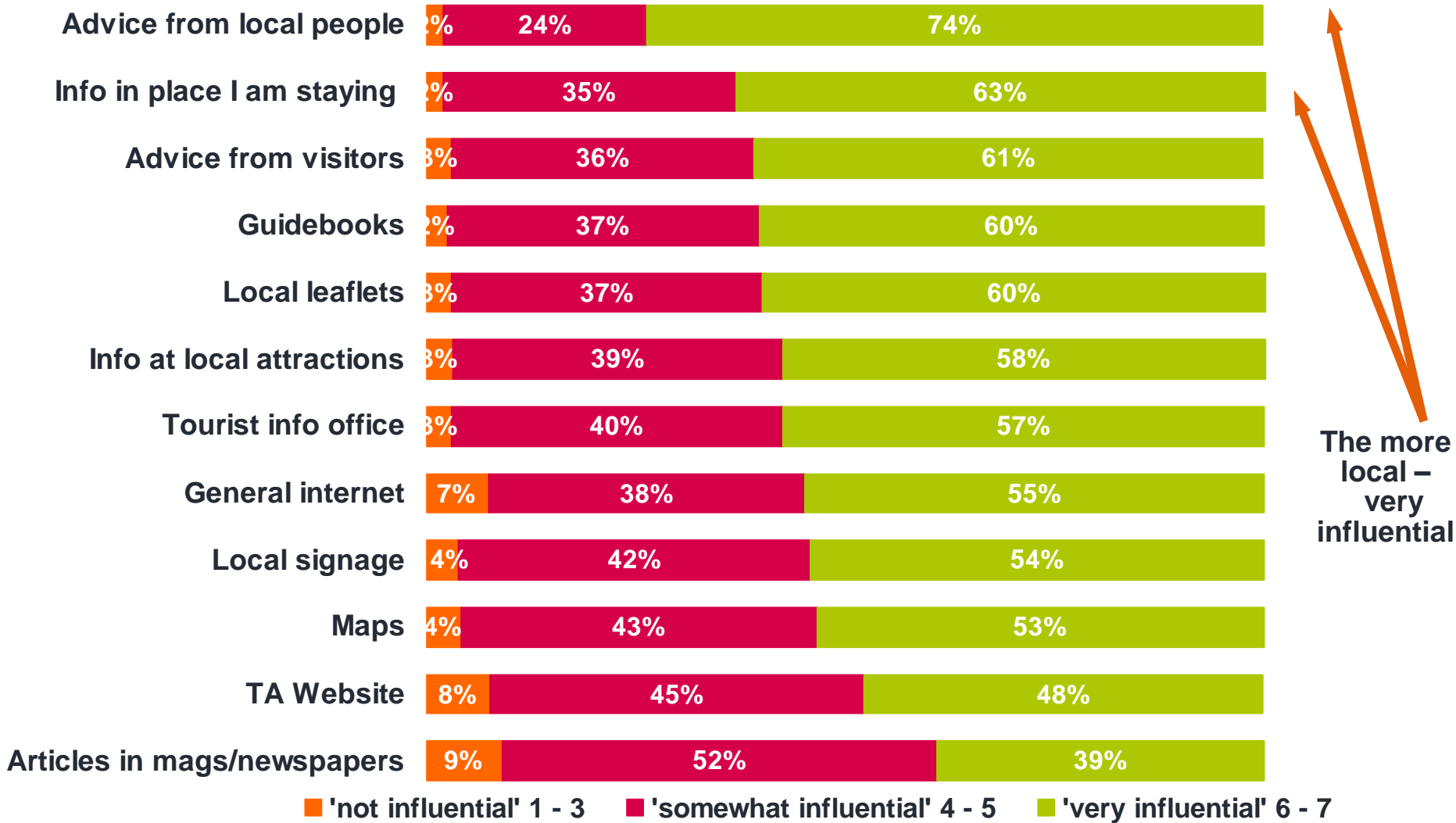
How do holidaymakers like to seek information about the environment at the destination?

The area of information use once at the destination is possibly where we see most variation across markets. Across all countries the use of information where holidaymakers stay is particularly important, highlighting the importance of accommodation providers helping holidaymakers with their travel plans and have an in depth knowledge of their region.

	Total								Visited Ire	Most likely
Info where I am staying	1	2	2	3	2	3	1	2	2	3
Guidebooks	2	5	3	2	1	4	1	3	1	1
Advice from locals	3	4	5	2	2	5	3	1	3	2
Local leaflets	4	1	1	4	3	1	10	4	6	5
General internet	5	2	4	10	2	2	2	2	4	6
Tourist info. office	6	3	3	1	6	4	5	5	5	4
Advice from other visitors	7	6	7	8	4	7	4	5	6	7



Influence of information sources on holidaymakers



Part 1 - Highlights



General holidaymaker preferences and planning - highlights

1. While differences exist, we see more **similarities across markets** as far as general decision making is concerned. Cost / value for money is particularly important, weather and the culture of the country in question also coming out strongly.

We see more variation in relation to the importance of landscape, possibly linked to the range of ways in which individuals define landscape in their own minds.

2. It is in relation to information seeking behaviour once holidaymakers get to the destination that we see the **importance of local information provision** and local advice in the place where holidaymakers are staying.

This points to the need to have a range of information sources available at source, coupled with the need for accommodation providers to be very well informed 'ambassadors' for their local region.

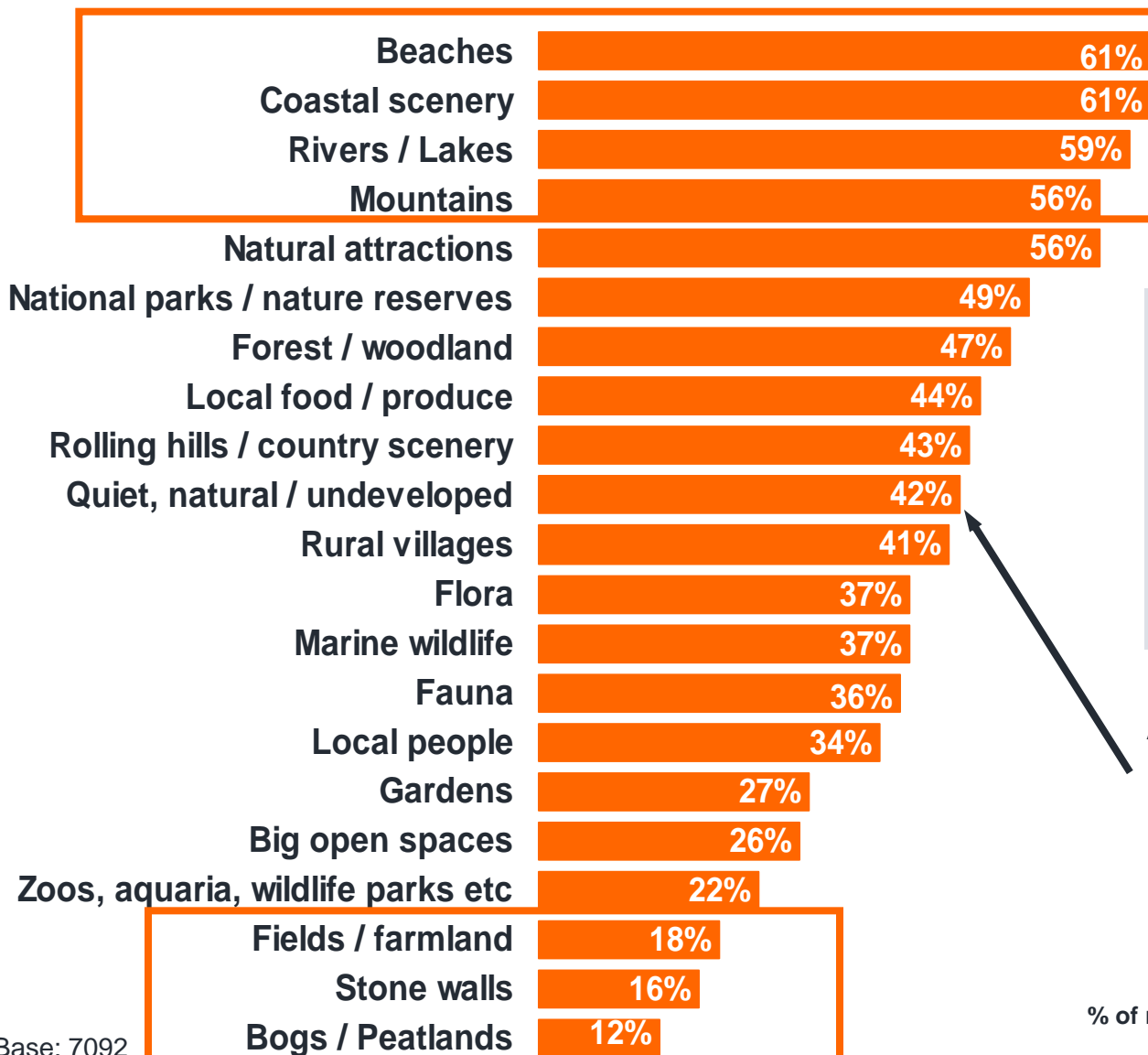
3. Across holidaymakers there appears to be a preference for less 'organised' or group travelling. **Local tours** however appear to be the exception, perhaps meeting the requirements of staying independent but getting the best out of where you are along the way. This may also be of particular relevance when we think how eco tourism providers position themselves.

Part 2
**Landscape and the natural
environment**

Associations with landscape



What springs to mind for holidaymakers when they think about landscape?



Beaches, coastal areas, rivers and mountains are the strongest associations holidaymakers overall have when they think about landscape and the natural environment, those other features seen in Ireland resonating less strongly, such as fields, stone walls and bogs.

A greater proportion of those who state they are willing to pay more for eco tourism options think of quiet, natural and undeveloped places

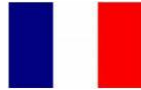
% of respondents who state each feature springs to mind when they think about landscape

Association with landscape

Holidaymakers across the following countries are more likely to think about the landscape and natural environment in terms of:



- + Coast
- + Rolling hills
- + Quiet / natural places



- + Big open spaces



- + Rivers / lakes
- + Forest / woodland
- + Flora / fauna



- + Fewer associations across the board, particularly with coast, quiet & natural places, local food/produce.



- + local people
- + mainly fewer associations across the board



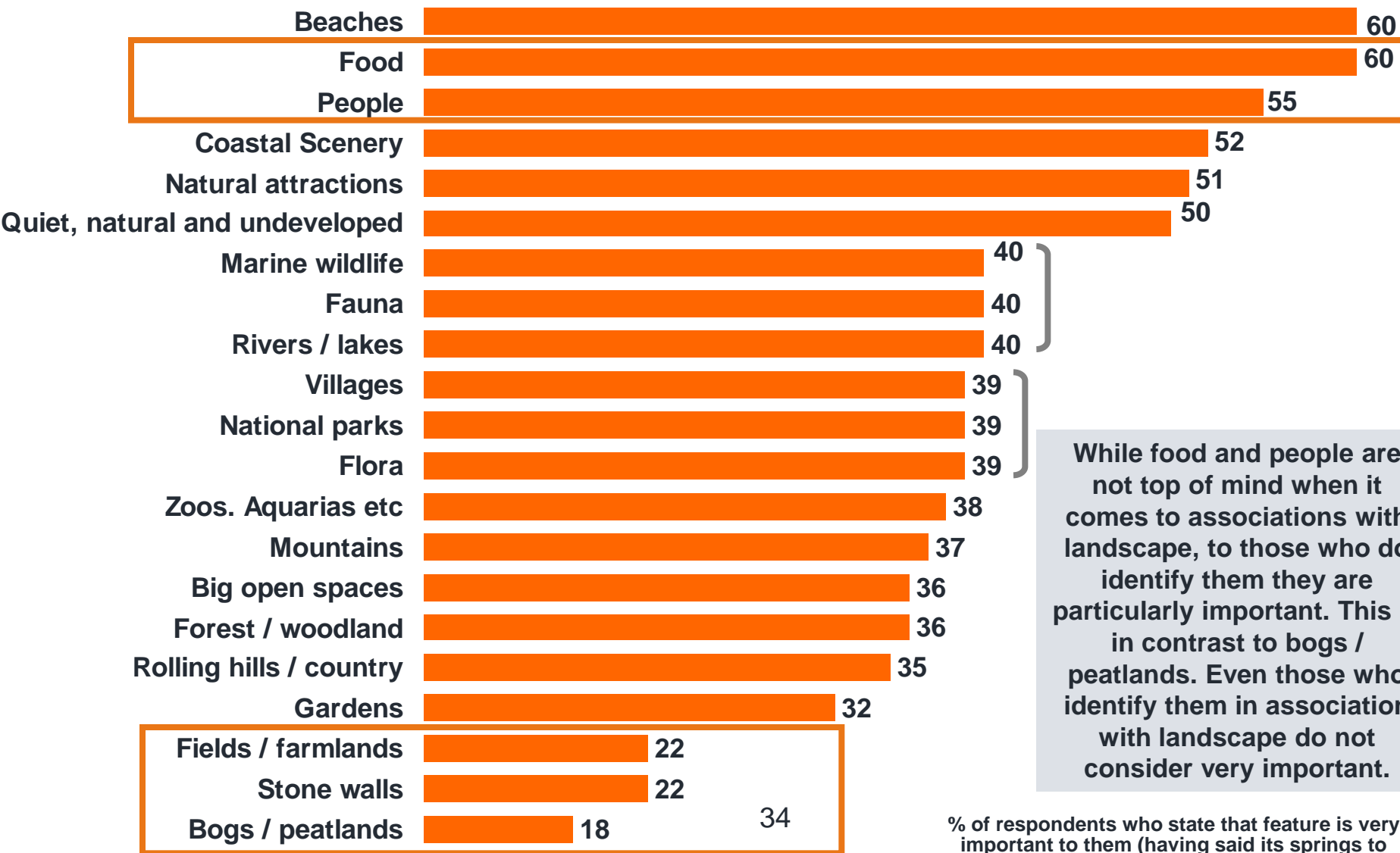
- + Beaches
- + Mountains
- + Gardens
- + Villages



- + Coast
- + Local people



Proportion of holidaymakers who consider feature very important



**What makes landscape
outstanding?**

So what makes outstanding landscape in the minds of holidaymakers?





So what makes outstanding landscape in the minds of holidaymakers?

Diverse

'diversity'

'varied'

'lots of contrasts'

'different cultures & landscapes'

'it had everything...from mountains to lakes'

'variety of landscapes ..flatlands to mountains, small towns to cities'

'diversity. in the course of one holiday you can see it all'

'huge variations in such a small country'

'wonderful diversity'

'vibrant colours and the variety'

Unspoilt

'so wild & natural'

'undeveloped'

'untouched'

'natural & unspoilt'

'free from development'

'raw yet beautiful'

'beaches with no one on them'

'completely natural, unspoilt, unpolluted'

'rugged, sparsely inhabited'



So what makes outstanding landscape in the minds of holidaymakers?

Different

'different to ours'
'very different to what I have seen before'
'like nowhere else'
'difference from my home place'
'outwith my experience'
'unique'

Scale

'vast'
'big expanse'
'very dramatic'
'vast countryside & mountains'
'big wide open spaces'
'so big, open and vast'

Beauty

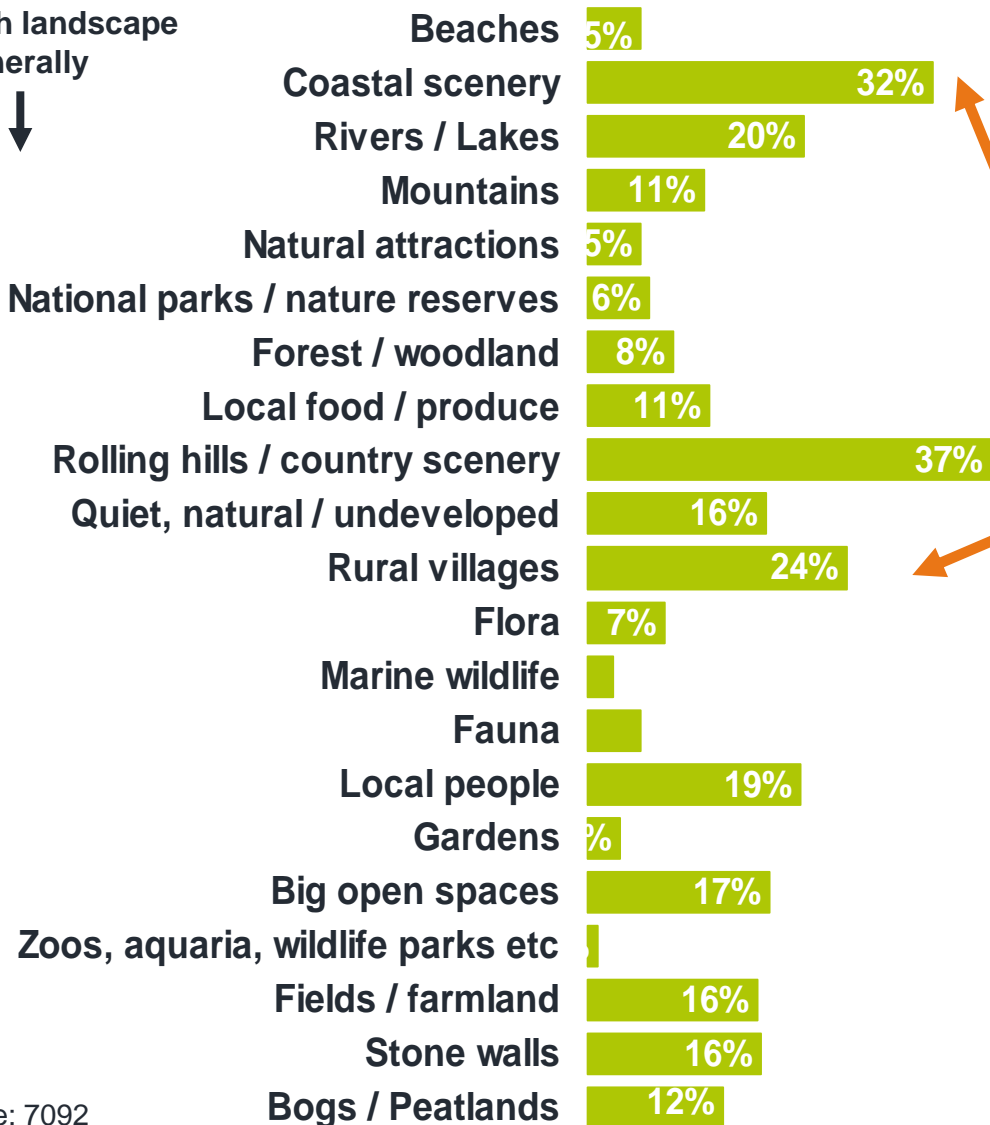
'lake regions particularly beautiful'
'beauty of mountains and fjords'
'countryside beautiful and coastline magnificent'
'it was beautiful, and the landscape so pretty'
'the wonderful beach and beautiful clear blue sea'

Thinking about the Irish landscape



What springs to mind for holidaymakers when they think about the Irish landscape?

Order of association with landscape generally



When it comes to associations with Ireland, it is rolling hills and coastal scenery which spring to mind, 1 in 4 holidaymakers pointing to rural villages, 1 in 5 identifying rivers, lakes and local people, associations generally however being weak.

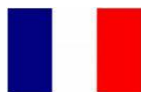
% of respondents who state each feature springs to mind when they think about Irish landscape



Relatively stronger associations with the Irish landscape across countries



- + Coast
- + People
- + Bogs / peatlands



- + Rivers
- + Quiet / natural / undeveloped areas
- + Fields / farmlands



- + Weak associations overall possibly reflecting less awareness / knowledge about Ireland as a destination



- + Rolling hills – weak associations generally



- + Rural villages – weak associations generally

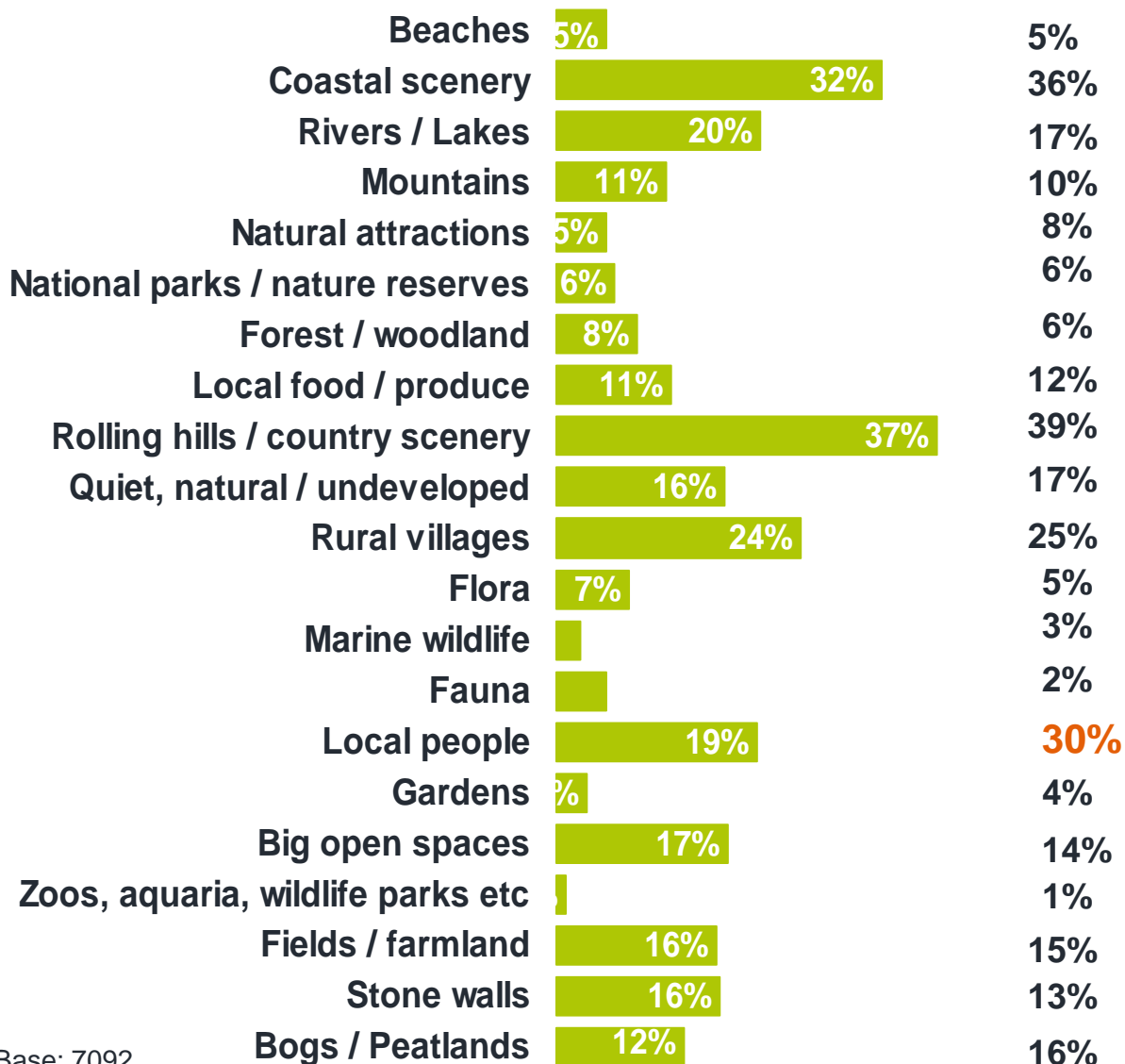


- + Rolling hills / scenery
- + Rural villages
- + Fields / farmlands



What springs to mind for holidaymakers when they think about the Irish landscape?

Those who have visited Ireland



Having experienced a trip here associations with local people rise.

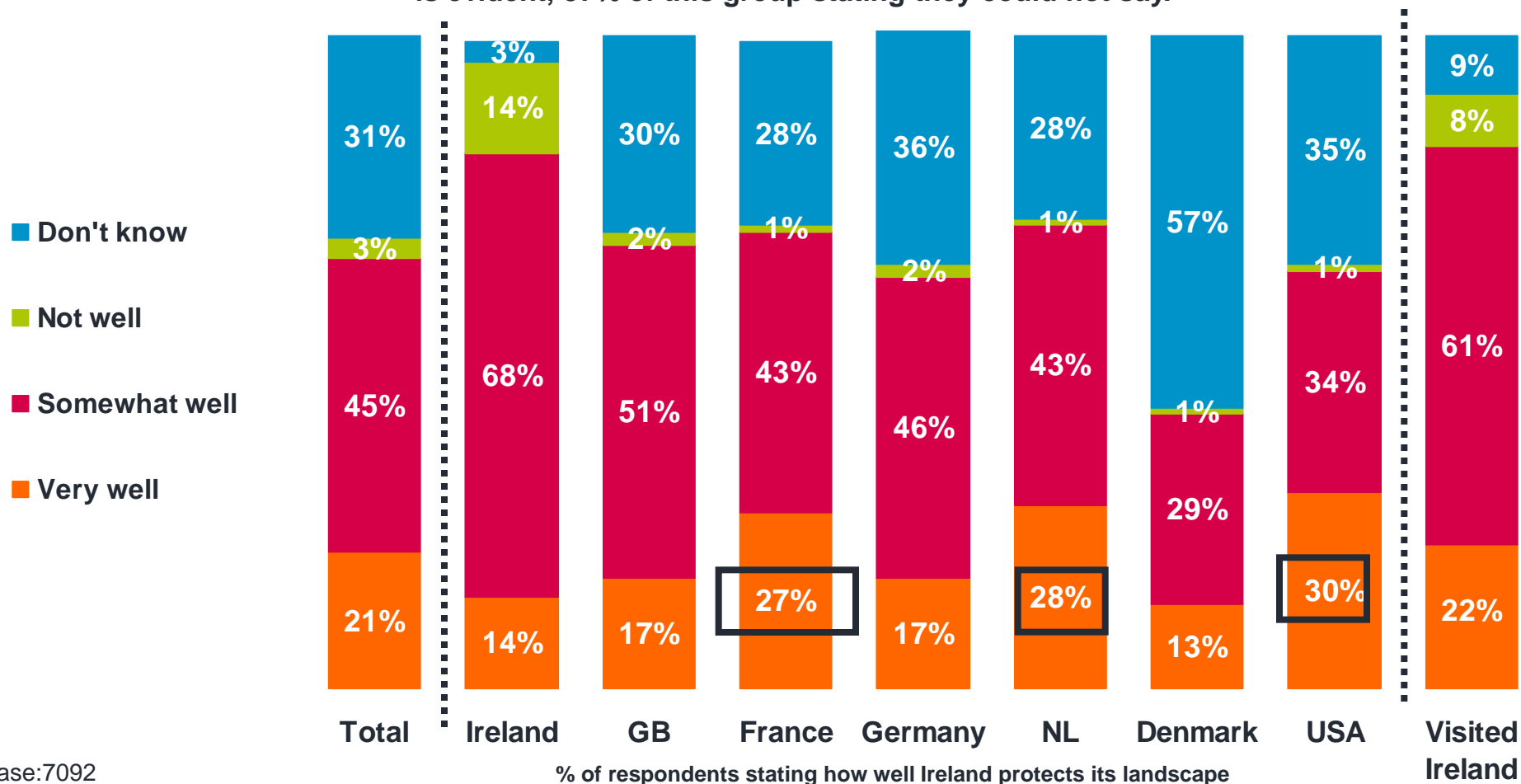


% of respondents who state each feature springs to mind when they think about Irish landscape



How well Ireland protects its own environment

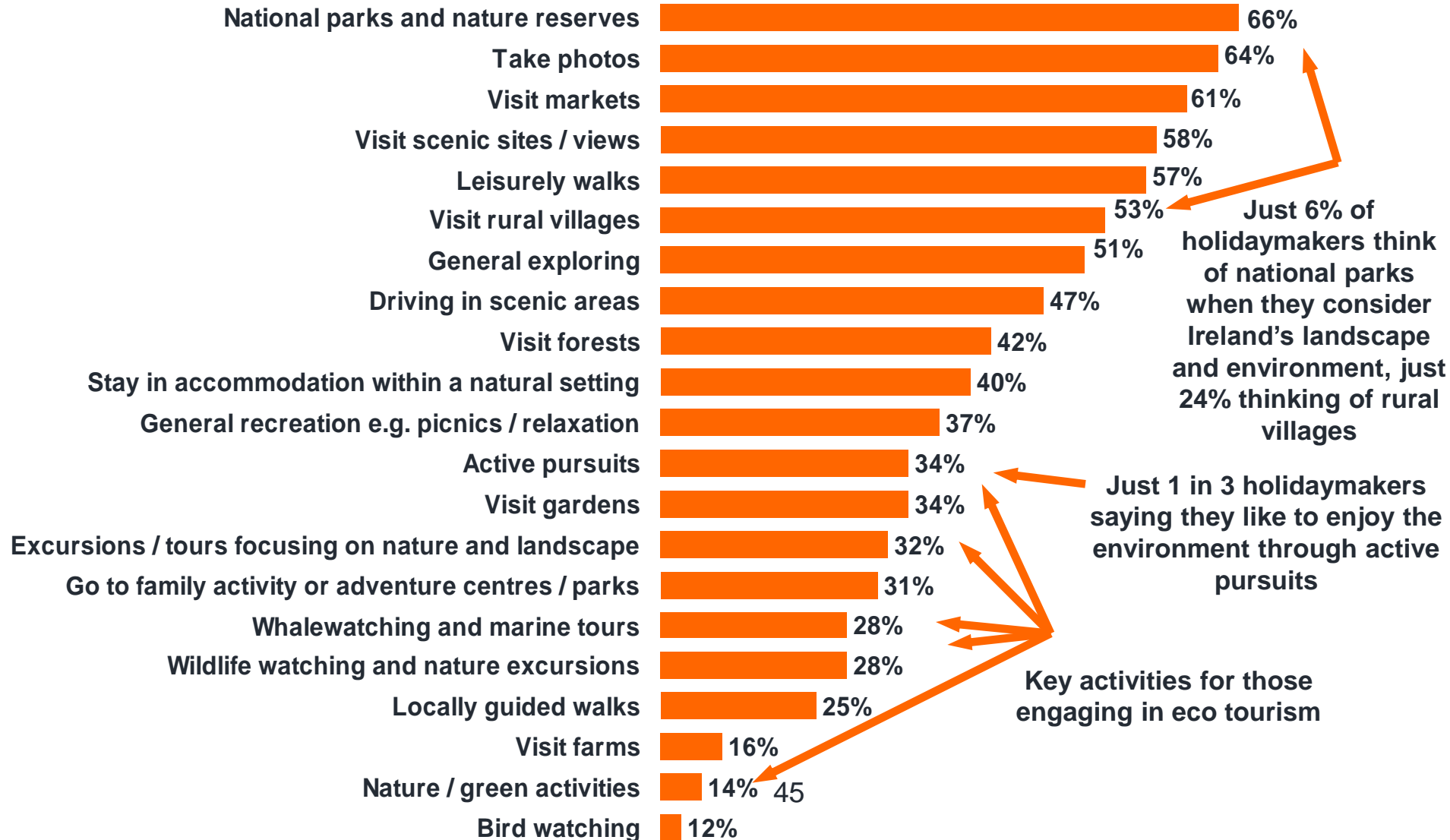
Overall about 1 in 5 holidaymakers state that from what they know about the country they believe Ireland protects its environment very well, rising to 27% of French holidaymakers, 28% of Dutch and 30% of those from the USA, and dipping to just 14% of Irish people, a similar proportion of whom say they believe we do not protect the environment. Danish holidaymakers' lack of knowledge about Ireland is evident, 57% of this group stating they could not say.



Enjoying landscape and the natural environment



How do holidaymakers like to enjoy the environment?





Enjoyment of the environment by country

Holidaymakers across the following countries are more likely to say they enjoy landscape and the natural environment through:



- + General exploring
- + Leisurely walks



- + Wildlife watching
- + Locally guided walks
- + Bird watching



- + Active pursuits
- + Visiting sites



- + Visiting forests
- + mainly see *less* engagement across activities

More passive



- + mainly see *less* engagement across activities



- + Driving around
- + Visiting sites & gardens
- + General exploring



- + General exploring
- + Driving in scenic areas



How do holidaymakers differ across markets in their enjoyment of the environment?

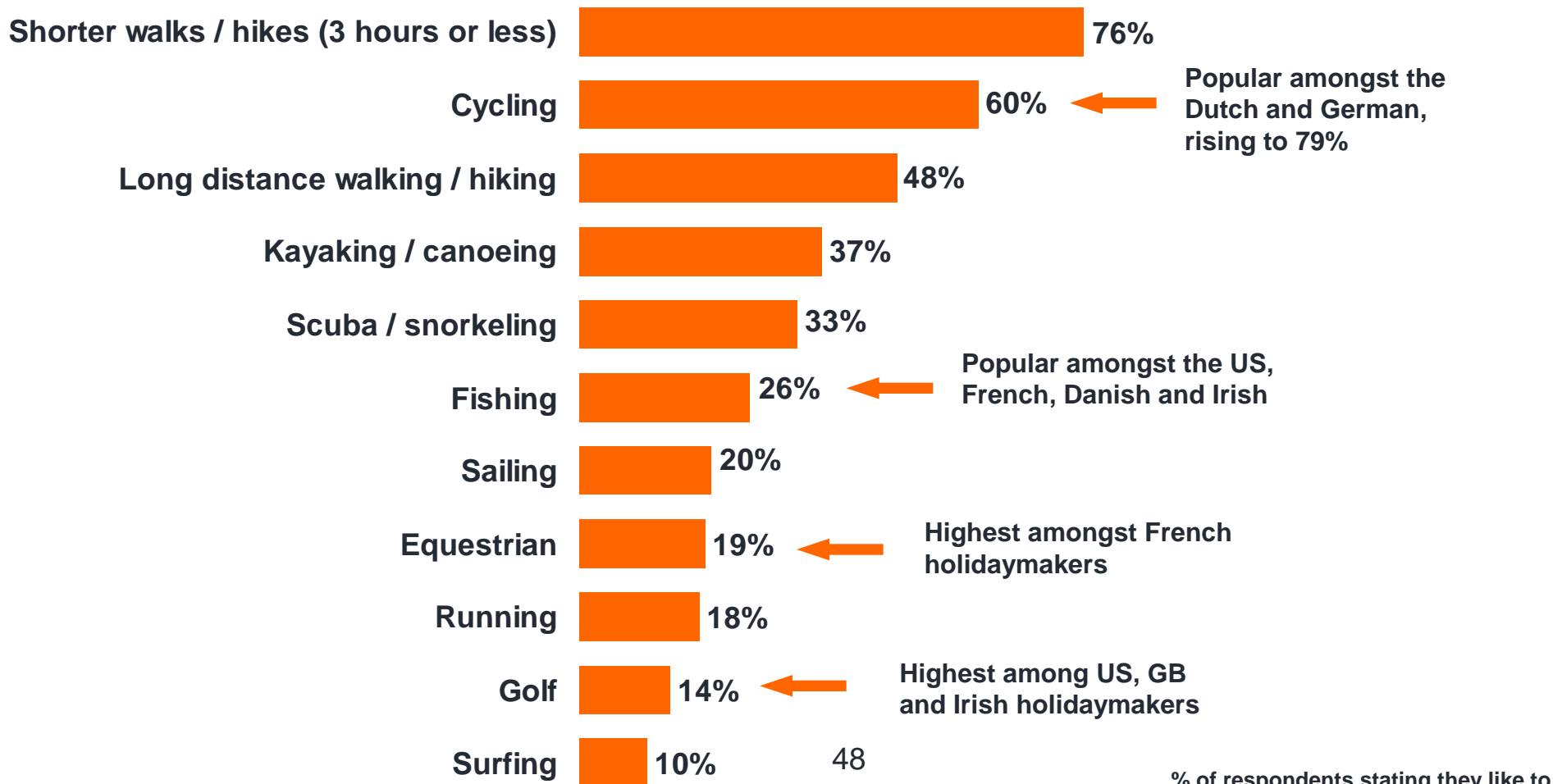
Across most countries holidaymakers say they like to enjoy the environment through visiting national parks / nature reserves and taking photos. Visiting markets too features strongly for all but US holidaymakers, those who are most likely to travel here also placing this high on the list.

	Total								Visited Ire	Most likely
Visit national parks / nature reserves	1	1	4	4	1	3	1	1	2	2
Take photos	2	1	1	1	5	1	4	2	1	1
Visit markets e.g. farmers markets	3	2	3	2	4	2	2	7	4	3
Visit scenic sites	4	4	3	3	2	7	7	2	3	4
Leisurely walks	5	3	1	6	3	6	6	3	4	5
Visit rural villages	6	5	5	5	11	2	3	10	5	5
General exploring	7	4	2	13	7	5	6	5	6	6



Active pursuits engaged in by holidaymakers

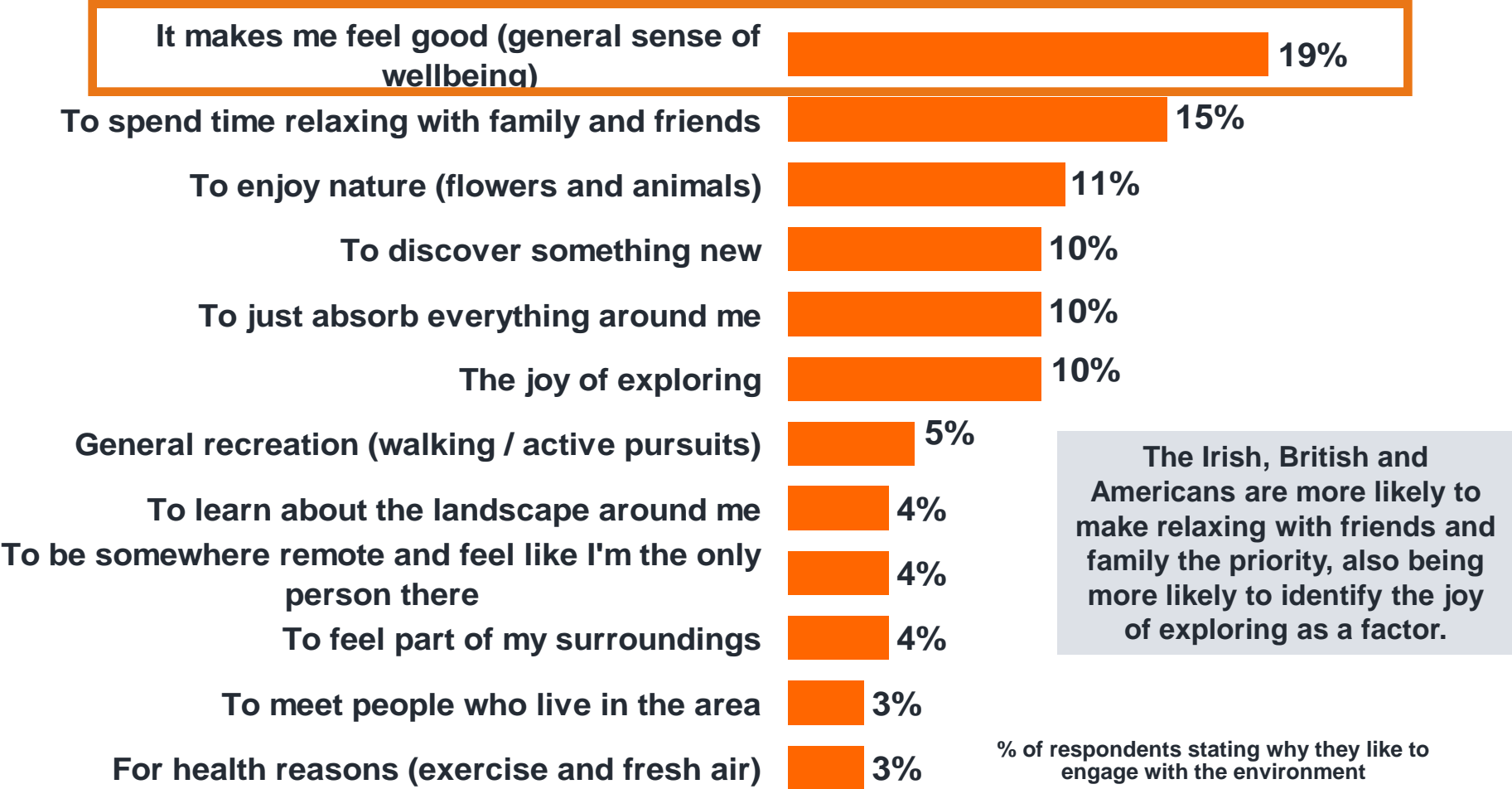
Shorter walks are the most popular active pursuit amongst holidaymakers, followed by cycling.





What is motivating holidaymakers in engaging in these activities / general enjoyment?

Holidaymakers generally say they like to engage with the environment for multiple reasons, finding it difficult to identify one overall factor, that sense of wellbeing coming out top when holidaymakers are asked to state their primary motivation.



Part 2
Highlights



Landscape and the natural environment - highlights

Landscape associations

1. Across markets when holidaymakers think about landscape and natural environment, it is beaches, coastal scenery, rivers, mountains, natural attractions and national parks which are associated most strongly.

When holidaymakers think about **Ireland associations are weak**, just 1 in 3 holidaymakers associating coastal scenery with Ireland despite the country being an island state. This lack of association when it comes to Ireland may be a potential threat to Ireland's consideration overall as a destination amongst those for whom landscape is an important consideration.

2. Having visited Ireland holidaymakers have strong associations with **local people**, however other associations are still weak.
3. When it comes to Ireland's protection of its own environment, attitudes are fairly similar, Irish holidaymakers however appearing to be more critical, 14% stating they believe the environment is well protected, a similar proportion stating they believe it is not at all well protected.



Landscape and the natural environment - highlights

Enjoying landscape / natural environment

4. While we might consider engaging in **active pursuits** to be strongly linked with enjoyment of the environment, this does not come out strongly within the findings, 1 in 3 holidaymakers stating they enjoy the environment in this way.

When we focus on eco tourism options specifically however active pursuits rise in importance.

5. In contrast those activities most frequently highlighted by holidaymakers include visiting **national parks, taking photos, visiting markets** and visiting **rural villages**.

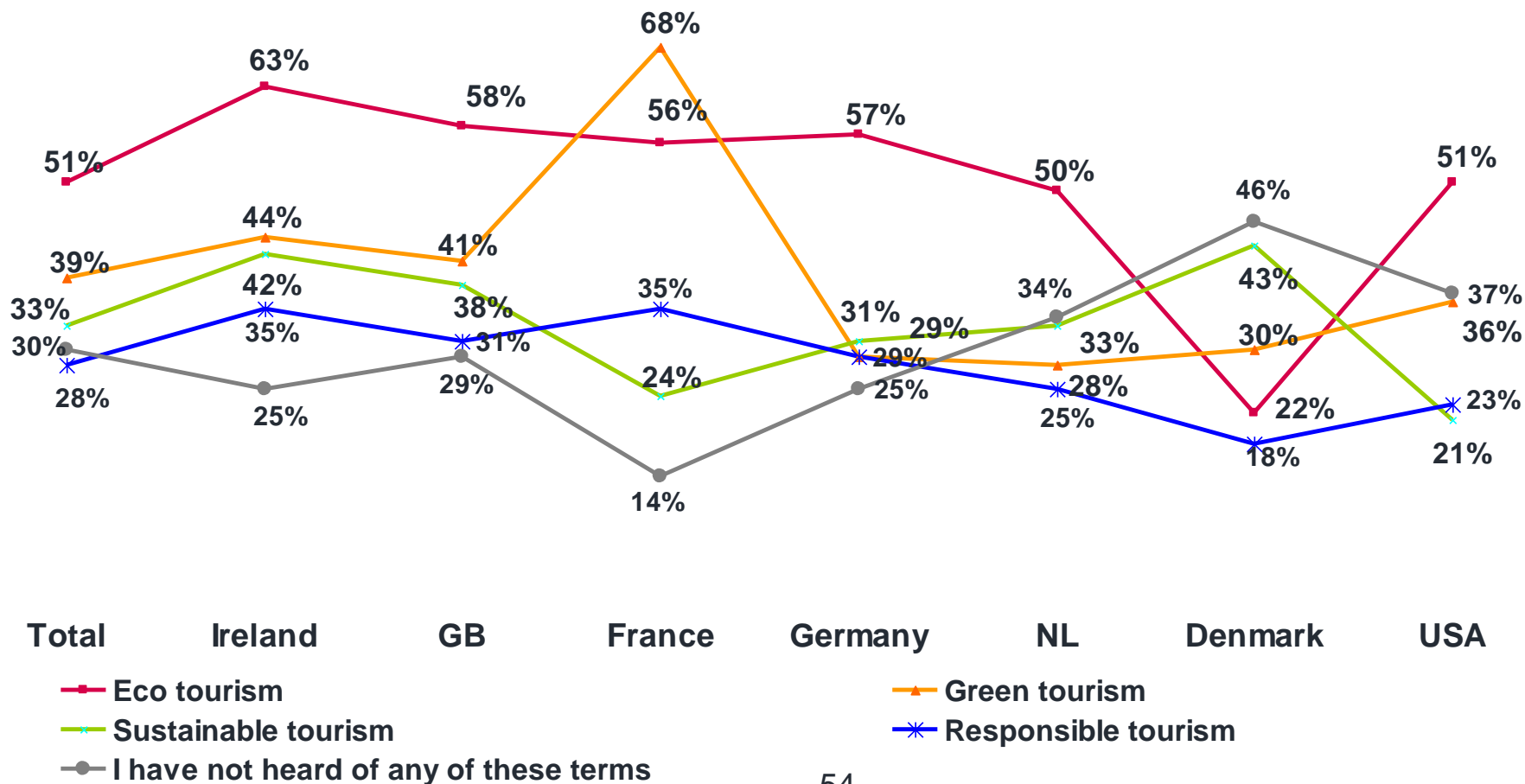
While national parks, markets, and rural villages could be seen as areas of strength in terms of our offering, just 6% of holidaymakers think of national parks when they consider Ireland, just 24% thinking of rural villages.

Part 3
Exploring eco tourism options



Awareness of green tourism terms

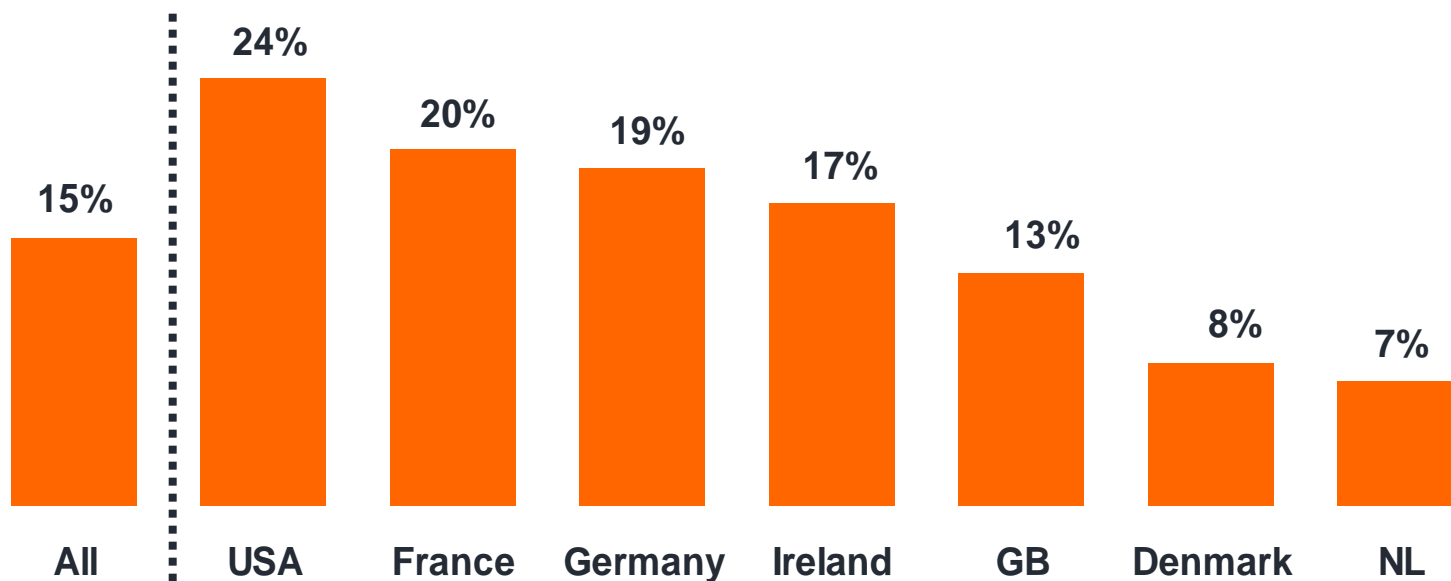
Across countries there is varying awareness of green tourism terms, 'eco tourism' generally being recognised most. Denmark is the country where we see fewest people who are aware, almost half not being aware of any of the terms.





Proportion of holidaymakers who have engaged in eco/green activities

Denmark is also the country, along with the Netherlands where we see the fewest holidaymakers who have engaged in eco / green tourism, at 8% and 7% respectively. This is in contrast to the USA, where 1 in 4 holidaymakers state they had engaged in eco / green tourism.





What can we say about those who have engaged in eco tourism?

More likely to:

Live in cities

Consider Ireland for a holiday in the future

Be heavier users of information sources before deciding on a destination, particularly guidebooks

Seek information about what to do in the environment from locals when on holiday

Be motivated by the fact that they are preserving the environment

Believe accreditation is very important

Take excursions focusing on nature and wildlife

Engage in active pursuits, particularly long distance walking

Want to feel like they are somewhere remote

More likely to consider engaging in eco tourism options in the future, particularly staying in green accommodation and engaging in educational activities

Pay more to engage in eco tourism (twice as likely)

Eco tourism providers



So what do our green providers have in common?

Passionate about what they do

Not motivated by deriving income from tourism specifically

Knee-jerk negative reaction to marketing / advertising of products or services

Desire to keep scale manageable – part of the sustainable tourism ethos

Perception that it is difficult to find people they can work with who share their passion

Can hold negative attitudes towards national organisations who are perceived as supporting only main stream providers

..And how do they differ?

- **Motivations driving product development**
- **Extent to which they are willing to work with others**



Working together – success factor for eco tourism providers

Shared understanding of what the network of providers need

Integrated regional approach (from the perspectives of both providers and consumers)

Commitment of private companies, public bodies, Govt departments, organisations and individuals involved to work together as a group e.g. extended national park zoning (area specific)

Supporting infrastructure, e.g. accommodation

Long term commitment

New thinking – how can we innovate?

A shared understanding of how to reach out to potential visitors (given negative reaction towards existing ‘mass advertising’ approaches)

Considering eco tourism options



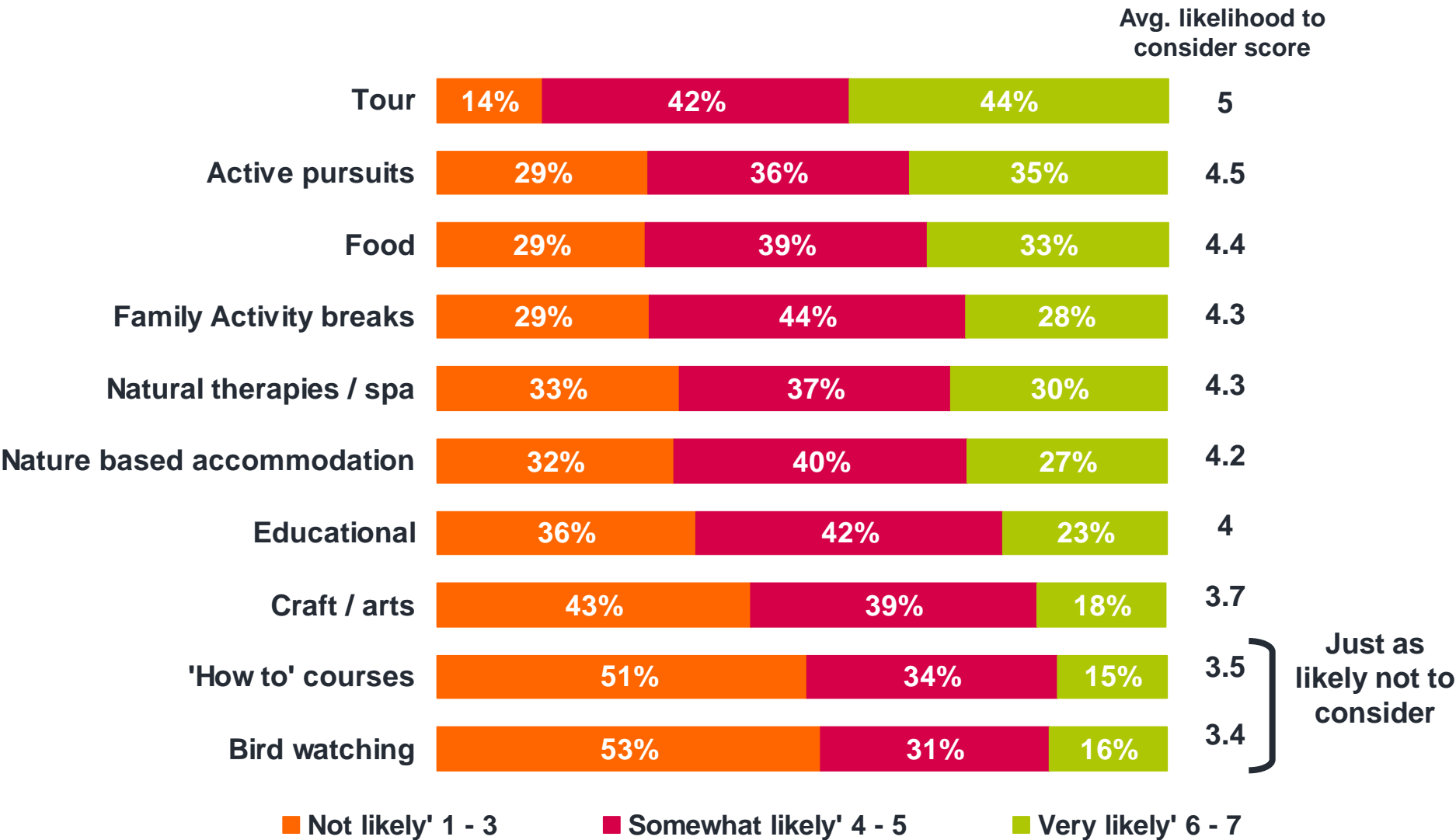
Eco / green tourism options – order of consideration by holidaymakers generally

- 1 **Tours** (local and small scale tours exploring hidden places)
- 2 **Nature based active pursuits** (e.g. hill walking, cycling, canoeing which includes interaction with and interpretation of the natural surroundings)
- 3 **Food** (where wellness, quality of life & local produce is at the centre)
- 4 **Family activity break** (based in natural surroundings where the focus is on interaction with the natural surroundings)
- 4 **Natural therapy / spa break** (relaxing with nature rather than standard spa / hotel based)
- 5 **Accommodation** (nature based accommodation rather than standard types (including alternative accommodation types set in woodland / countryside, availing of local produce etc)
- 6 **Educational activities** (ecology/nature)
- 7 **Craft / arts break** (based in natural surroundings)
- 8 **'How - to' courses** (e.g. organic farming, nature, photography)
- 9 **Bird Watching**

...food and natural therapy options being relatively higher on the list of those who have not engaged in the past



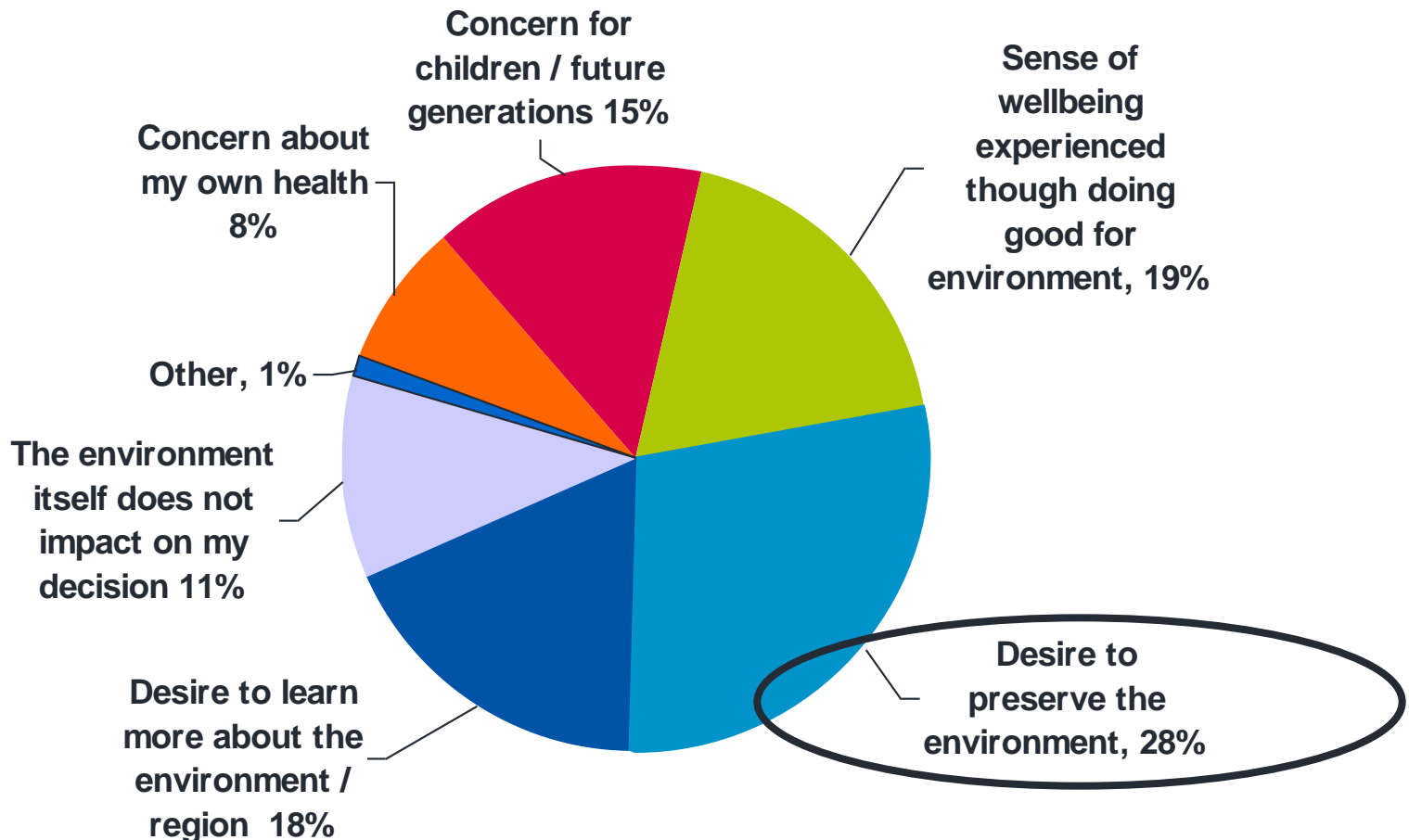
Likelihood to consider eco tourism options overall





Why are people considering green alternatives?

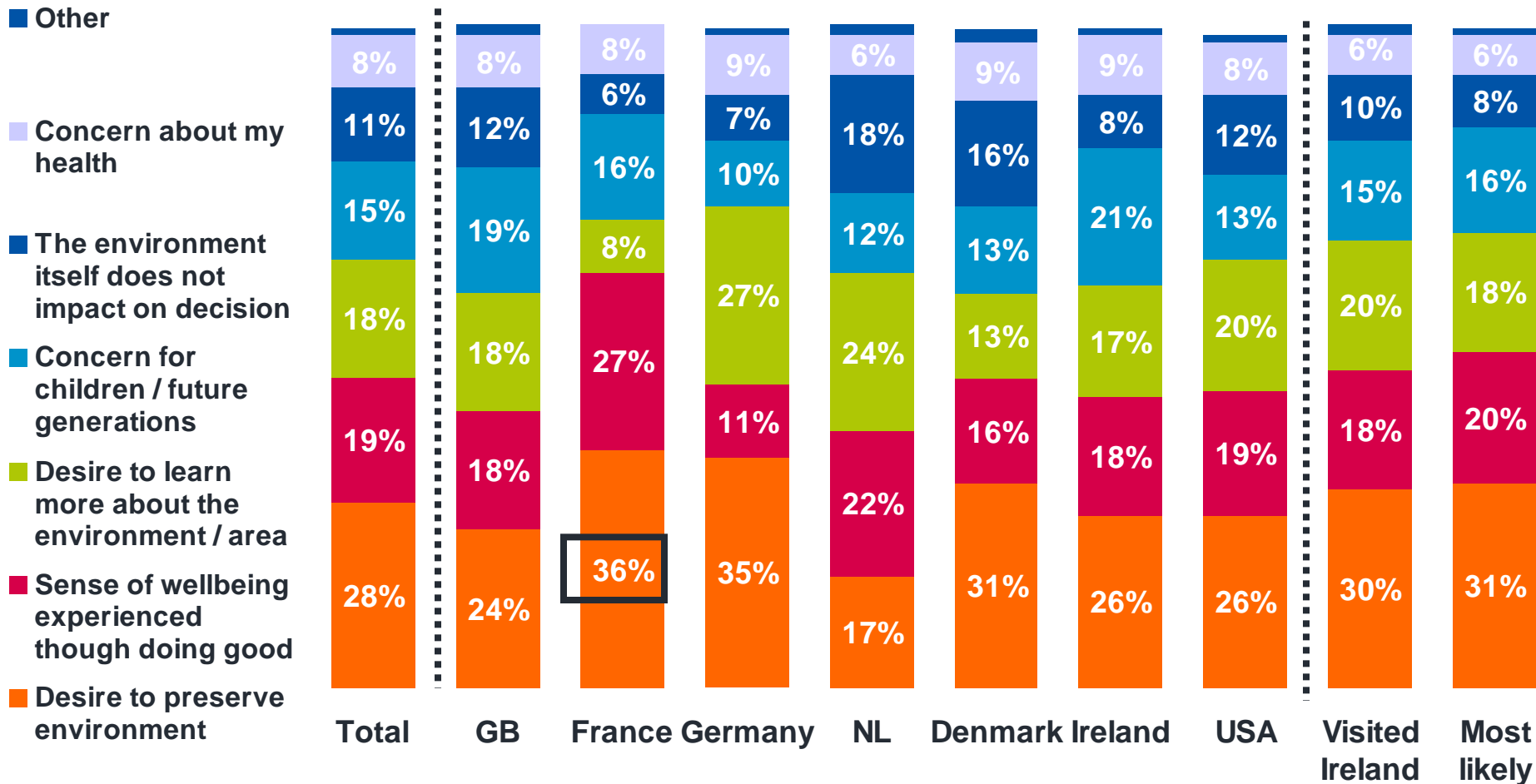
A desire to preserve the environment is the primary factor driving consideration of green alternatives, the sense of wellbeing and desire to learn more about the environment also featuring strongly.



% of respondents stating they would consider green alternatives for a particular reason



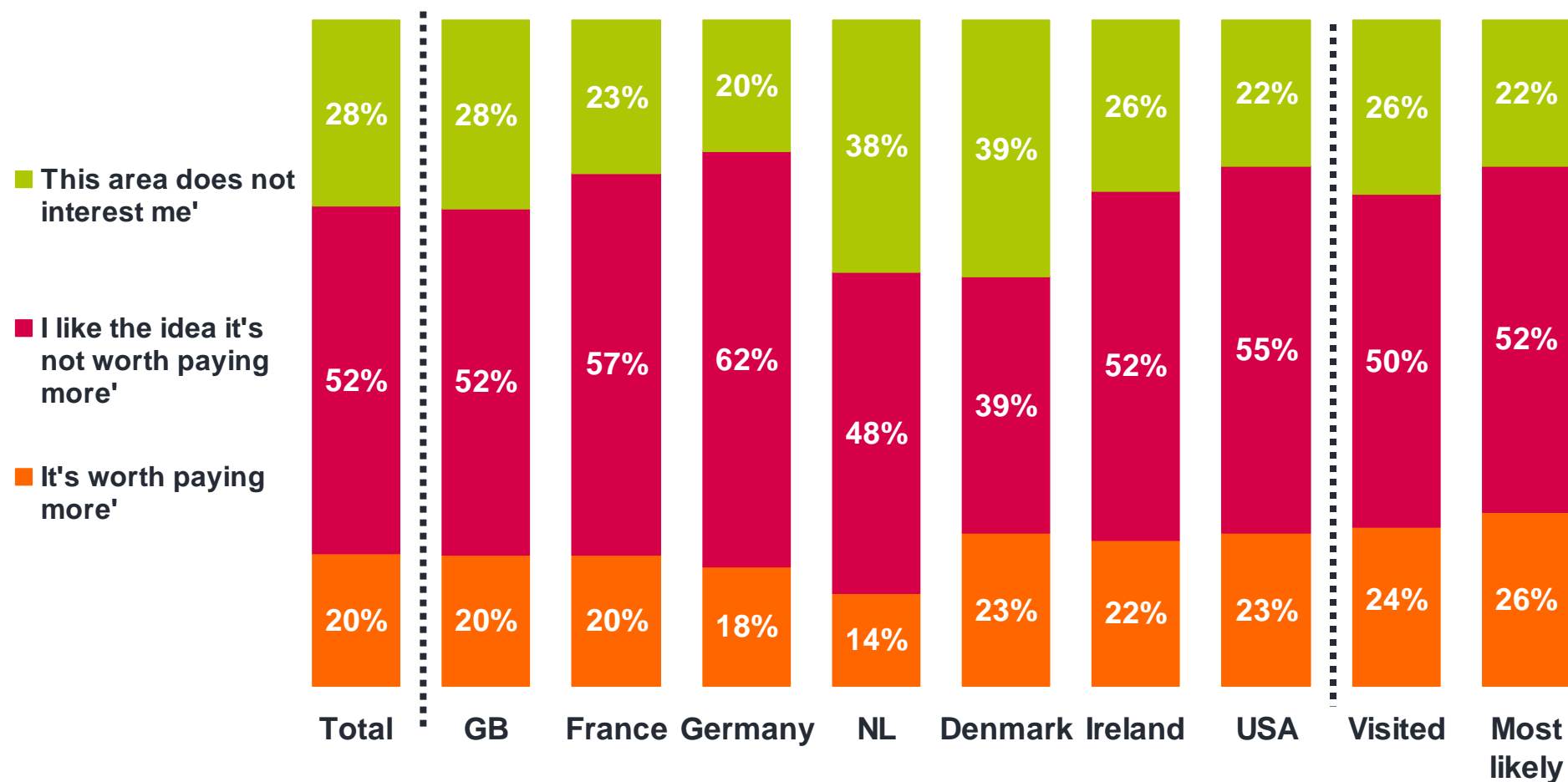
How do motivations differ across countries





Are holidaymakers willing to pay more for green alternatives?

Overall about 1 in 5 holidaymakers (20%) are willing to pay more for green alternatives, rising to 26% of those who are most likely to consider Ireland as a destination and almost 40% of those who have engaged in eco tourism in the past. Dutch holidaymakers are the least likely to say they will pay more.



Base:7092

% of respondents stating they would pay more or not pay more



Who are those who are willing to pay more?

More likely to be...

Between 25 and 34 yrs

More widely travelled

Take locally guided tours

Seek accommodation set in the countryside

Think of landscape in terms of quiet, natural and undeveloped places

Enjoy visiting forests, wildlife watching, taking excursions focusing on nature

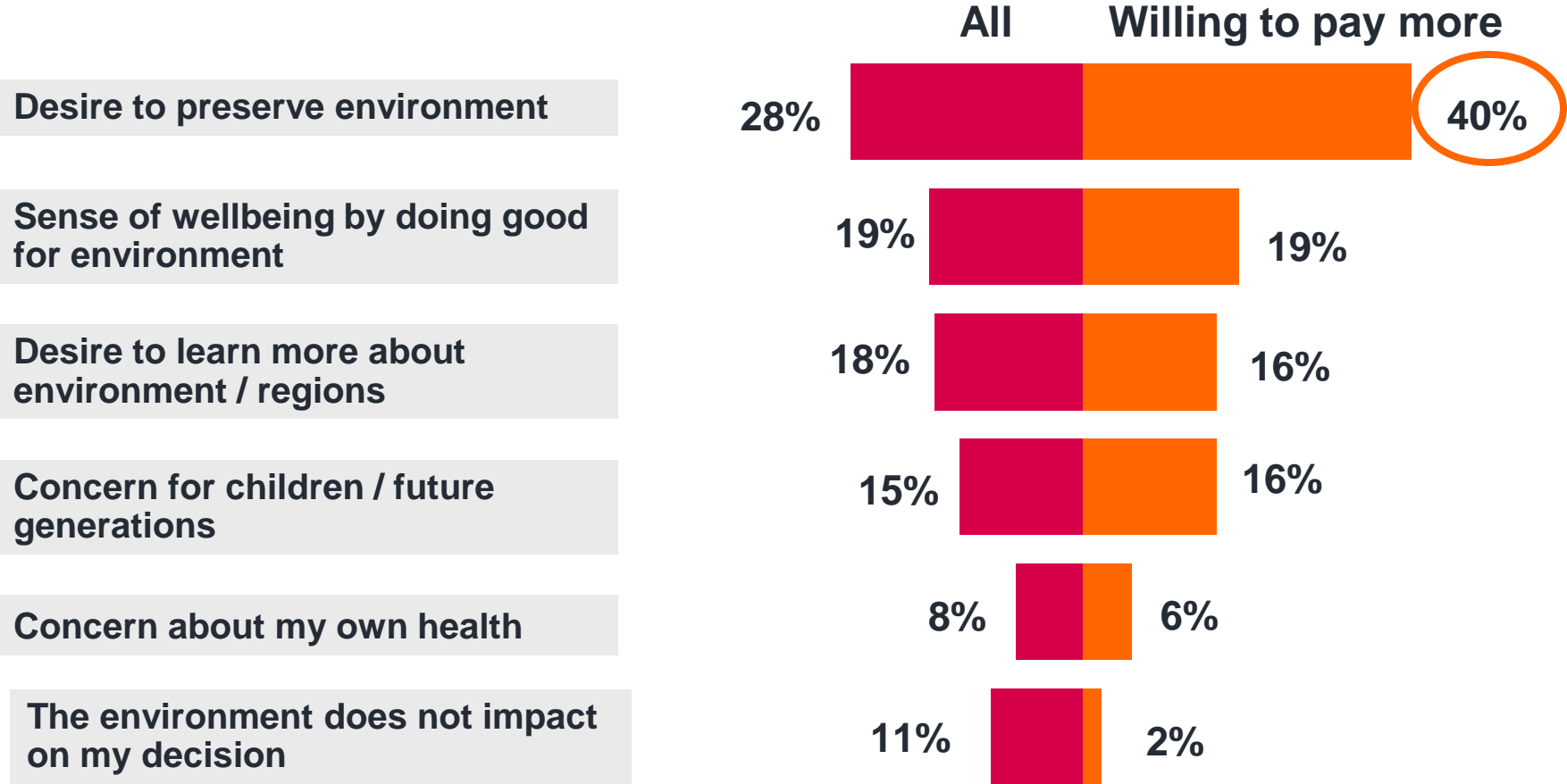
Be heavier users of information, particularly guidebooks

Seek advice from local people when at the destination



What motivates those who are willing to pay more?

Those who are willing to pay more are very much motivated by the desire to preserve the environment, rather than any motivation relating to themselves.





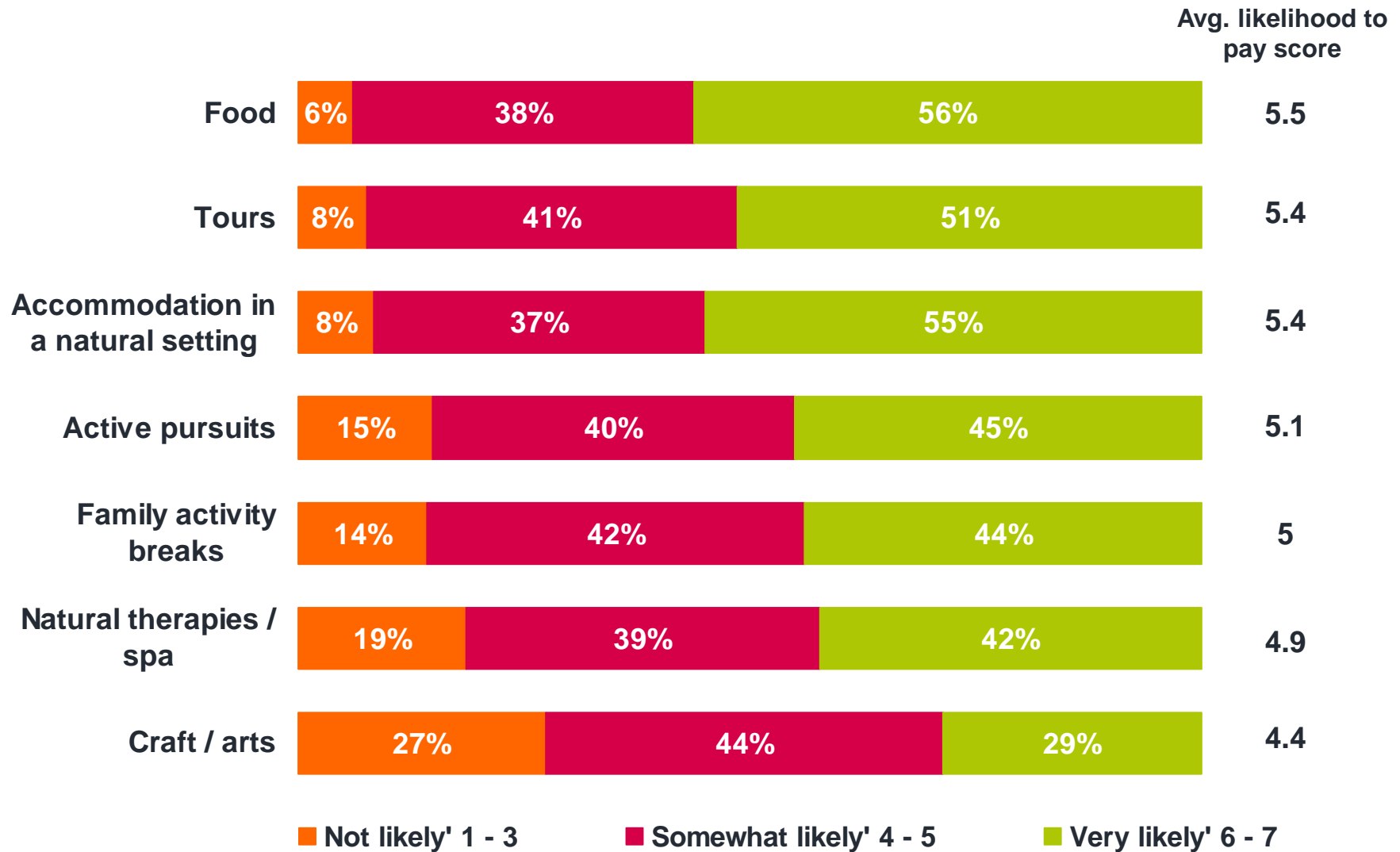
In what order is this segment likely to pay more for green alternatives?

For those who are willing to pay more it is food that tops the list, followed by tours and accommodation.

- 1 **Food** (where wellness, quality of life & local produce is at the centre) →
 - 2 **Tours** (local and small scale tours exploring hidden places)
 - 2 **Accommodation** (nature based accommodation rather than standard types (including alternative accommodation types set in woodland / countryside, availing of local produce etc)
 - 3 **Active pursuits** (e.g. hill walking, cycling, canoeing which includes interaction with and interpretation of the natural surroundings)
 - 4 **Family activity break** (based in natural surroundings where the focus is on interaction with the natural surroundings)
 - 5 **Natural therapy / spa break** (relaxing with nature rather than standard spa / hotel based)
 - 6 **Craft / arts break** (based in natural surroundings)
- Amongst those most likely to travel here accommodation takes the top position






Likelihood to pay more by eco tourism option



% of respondents stating how likely they would be to pay more for particular options



How does likelihood to pay for green alternatives differ by market

	Total								Most likely
Food	1	1	1	1	2	3	2	1	2
Accommodation	2	2	1	2	4	1	3	2	1
Local tours	2	3	2	3	1	2	1	2	2
Active pursuits	3	6	4	4	2	4	4	3	3
Family activities	4	4	3	4	5	5	5	3	4
Natural therapies	5	5	4	5	3	6	6	4	5
Crafts	6	7	5	6	6	7	7	5	6



Perceptions potentially challenging the development of 'eco' tourism – holidaymaker & travel industry perspective

By coming to Ireland (small country) and staying locally, one is already engaging in sustainable tourism

Too worthy to be enjoyable – conjuring up earnest images

It's not credible for Ireland to be an eco tourism destination given general attitudes amongst Irish people and authorities towards the environment

There needs to be clear standards in place (German & French markets in particular)

Landscape and environment is a backdrop which visitors take for granted

Products and services need to be connected within a 'network'

Eco tourism means different things to different people

Sounds 'very niche'



The importance of communicating the (tangible) benefits of eco tourism

While at best this area can be difficult to define, identifying the tangible benefits of eco tourism to potential holidaymakers will enhance their likelihood to consider these products and services.

These benefits should be considered in both functional and emotional terms

The exercise in itself may also act to discipline providers and encourage them to think from the perspective of the holidaymaker.

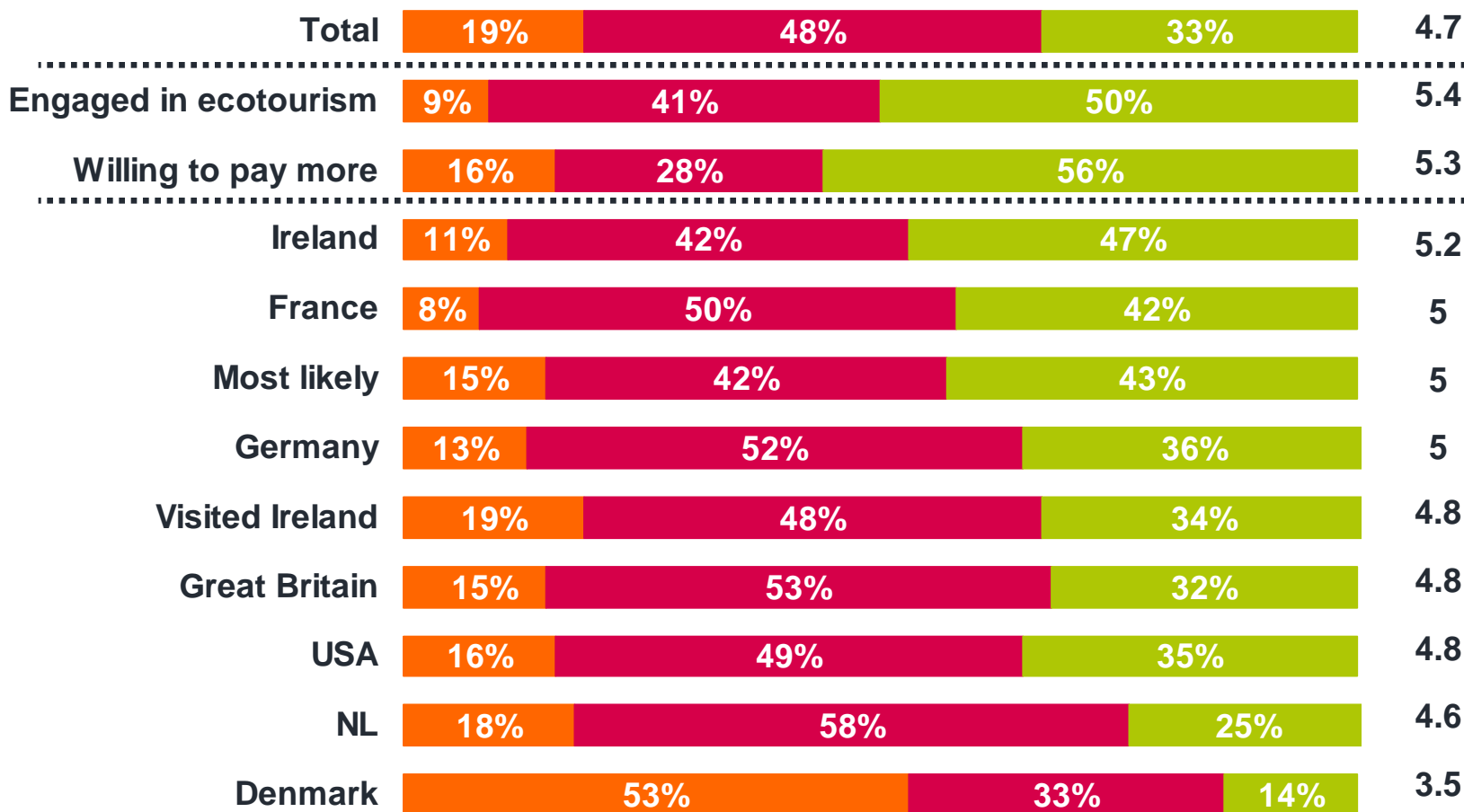
Importance of accreditation to holidaymakers



The importance of accreditation (eco tourism providers) to holidaymakers

Where accreditation is concerned, those who have an interest in eco tourism appear to award it the greatest importance, Dutch and Danish holidaymakers awarding it least, in line with what appears to be lower interest generally.

Avg. importance score



■ 'not important' 1 - 3 ■ 'somewhat important' 4 - 5 ■ 'very important' 6 - 7 ■

Part 3
Highlights



Exploring eco tourism options - highlights

1. About 1 in 6 holidaymakers overall rising to 1 in 4 of US and 1 in 5 French holidaymakers state they have **engaged in eco tourism**, the lowest proportion being in Denmark and the Netherlands. This is despite the Dutch giving top priority to enjoying nature when asked about the types of holiday they like to take. It is clear that the Dutch wish to enjoy nature in a different way.
2. The good news for eco tourism providers here is that those who have engaged in eco tourism are more likely than holidaymakers **generally to consider Ireland** for a holiday and **twice as likely to pay** more for green alternatives. In terms of targeting those who are willing to pay more we need to bear in mind that they are **heavier users of information** in planning their holiday and also keener to pick up information about what to do in the environment from locals in the area.
3. Looking at willingness to pay more in greater detail, **local and small scale tours** take the priority, followed by active pursuits. In line with the general picture relating to interest however even those who said they would pay more overall from Denmark and the Netherlands show less likelihood when presented with specific options.

Conclusions and thoughts about the future



Conclusions and thoughts about the future

- 1. More similarities than differences:** Despite the breadth of this study and number of countries across which we ascertained the views of holidaymakers, overall we see more similarities than differences, supporting the value of a universal strategy for landscape and eco tourism in Ireland, albeit attuned across countries and segments.
- 2. Defining landscape:** This study highlighted the difficulty in defining landscape and differing interpretations that exist in the minds of holidaymakers, people being as important to many holidaymakers (1 in 3) as the more traditional features such as beaches. It also highlighted the lack of associations holidaymakers have with the Irish landscape.



Conclusions and thoughts about the future

- 3. Enjoyment of environment:** Holidaymakers stated that they enjoyed the environment in a multitude of ways, going well beyond green activities and active pursuits.

What is striking is the disparity between how holidaymakers think about the landscape and enjoy the environment and Ireland's association with these features and activities. For instance more holidaymakers say they like to visit national parks and nature reserves than anything else, just 6% associating these with the Irish landscape, with 53% stating they liked to visit rural villages, just 24% associating these with Ireland.

Similarly when thinking about landscape, while over 60% of holidaymakers think about beaches, just 5% of holidaymakers would associate them with the Irish landscape, rising to only 9% of those who have already visited here.



Conclusions and thoughts about the future

- 4. Local importance:** Amongst holidaymakers generally there is a preference for independent travel, our qualitative preparatory research indicating there can be a knee jerk negative response to 'organised / group' travel amongst travellers.

Attitudes towards local and more small scale tours as presented within eco tourism options however were very positive, more holidaymakers saying they would be likely to consider them than any other activity.

Preparatory research amongst holidaymakers and eco tourism providers also indicated an interest in taking in more than one eco tourism option within a tour.

At the destination local sources of information are used and considered influential. This highlights the importance of local knowledge amongst tourism product providers of all types, particularly accommodation providers, and their potential influence in encouraging travellers to try out eco tourism products.



Conclusions and thoughts about the future

- 5. Benefit lead communications:** Our findings underline the importance of cost / value of money to holidaymakers when choosing a holiday.

This coupled with the varying definitions of eco tourism, range of options currently available and feedback from travel industry professionals highlight the need for the benefits of eco tourism to be communicated to holidaymakers so they are clear about what they are paying for.



Conclusions and thoughts about the future

- 6. Eco tourism and the necessary context:** This study highlights the range of ways in which holidaymakers like to enjoy the environment, passive, active, sustainable and not so sustainable.

Talking to providers and visitors we also see the contrast between some existing 'environmental attractions' and what providers define as eco tourism options, linked to scale and motivations for participating. Those who engage in eco tourism being motivated by their role in preserving the environment than anything, this segment also thinking more about quiet, natural and undeveloped places.



Conclusions and thoughts about the future

- 7. Targeting holidaymakers across countries:** Landscape, natural environment and eco tourism specifically appear more appealing to the French holidaymaker, the French market also potentially more accessible given their use of Tourist Authority information and their likelihood to consider Ireland in the next three years.

Overall these holidaymakers –

- Believe landscape is important in holiday choice

- Make relatively greater use of Tourist Authority websites

- Make relatively greater use of tourist information offices at destinations

- Believe Ireland protects its own environment well

- Are more likely overall to consider eco tourism options

- Are twice as likely to say they will consider visiting Ireland in the next 3 years