

# **Sustainable Tourism: Greening Ireland's Tourism Strategy**

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# Outline

## 1. Why tourism matters

## 2. The outlook *(As with any outlook these days, health warnings apply!)*

## 3. Building tourism back better



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National Tourism Development Authority

# **Why tourism matters**

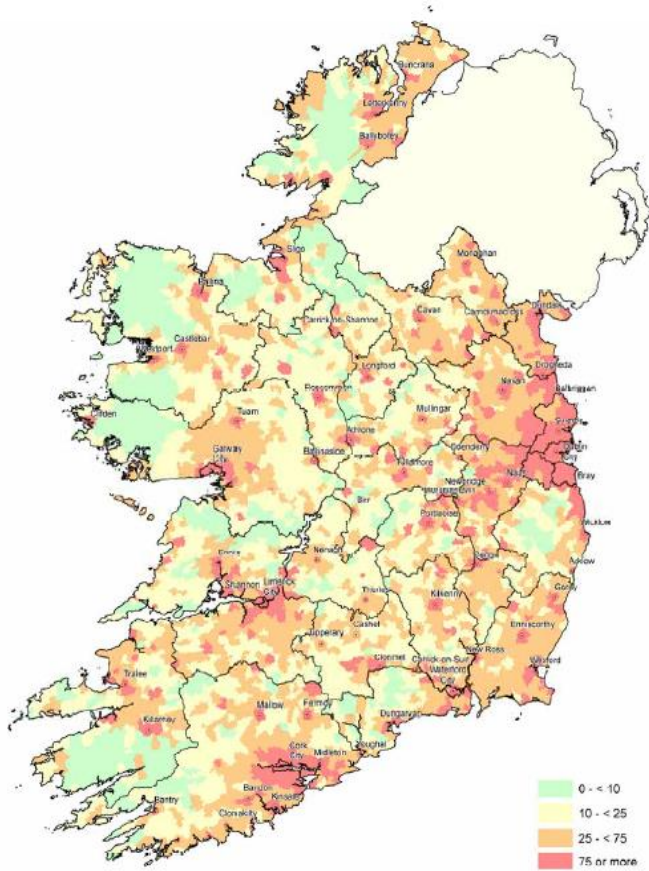
## **The Value of Tourism Pre-COVID**

- Tourism **employment was 260,000**
- Tourism delivered **€7.8bn in expenditure**
- Tourism delivered **€1.8bn in exchequer revenue, which works out at €1,000 per household**
- Tourism **sustains communities** and drives regional development in a manner that most other industries struggle to deliver

## **Ireland does tourism well**

- **2:1 ratio of overseas tourist to domestic residents.**  
Less than 1:1 in Scotland and New Zealand.
- **2:1 ratio of domestic trips to population.**  
Higher than for Scotland or NZ.
- **High satisfaction rates** amongst tourists and locals.
- **Above average employment** in tourism as a share of total jobs.
- Better than average performance on **seasonality and regionality.**

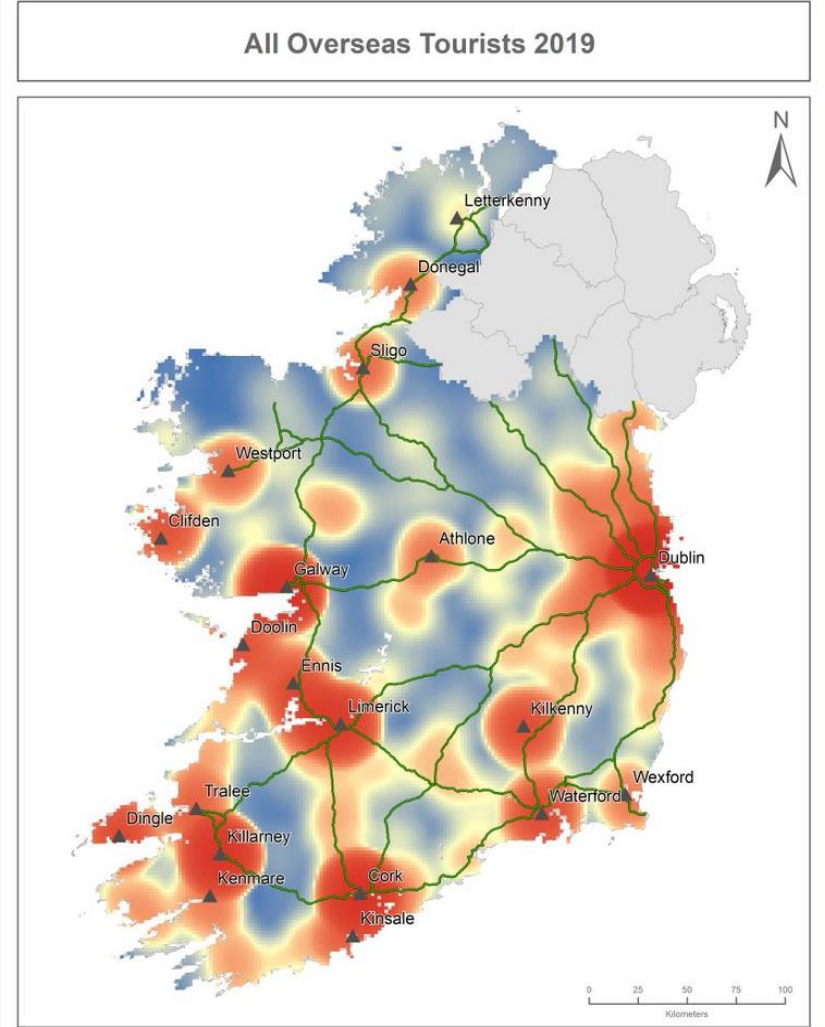
# Regionality



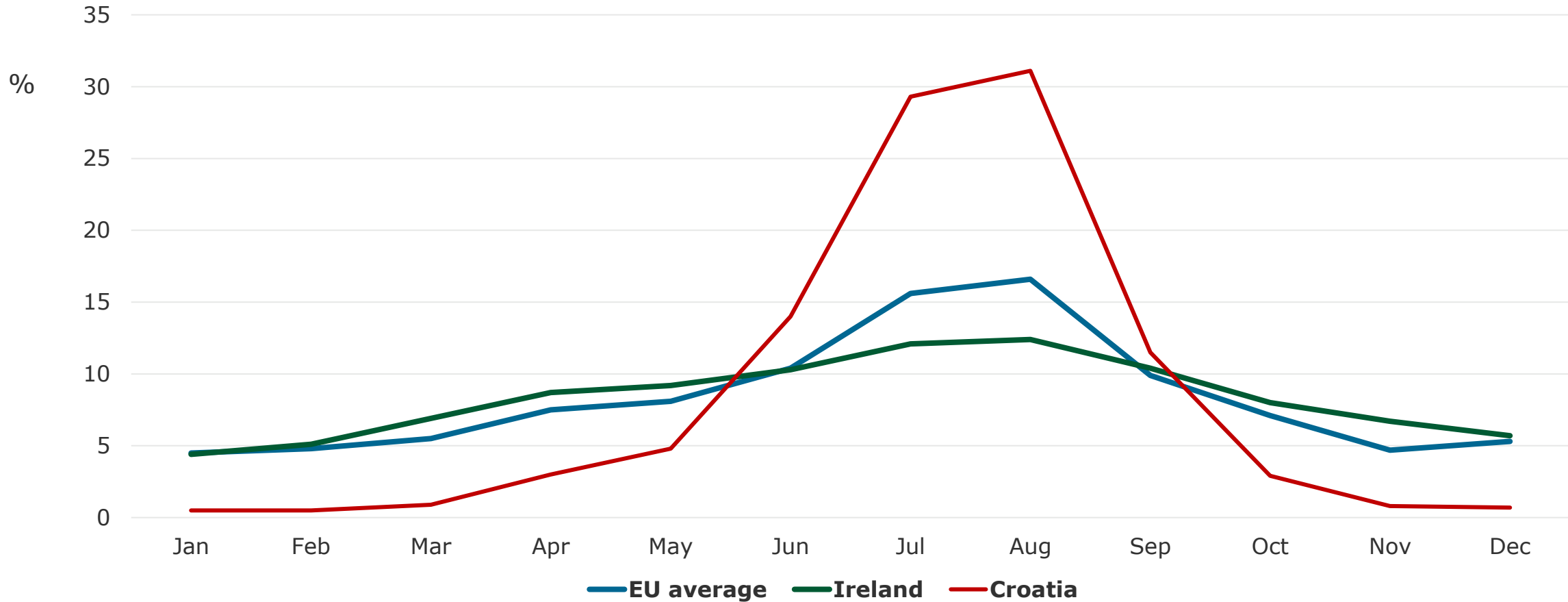
**Population density**



**Overseas tourists' density**



## Monthly spread of tourists in selected European countries





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# **The Outlook**

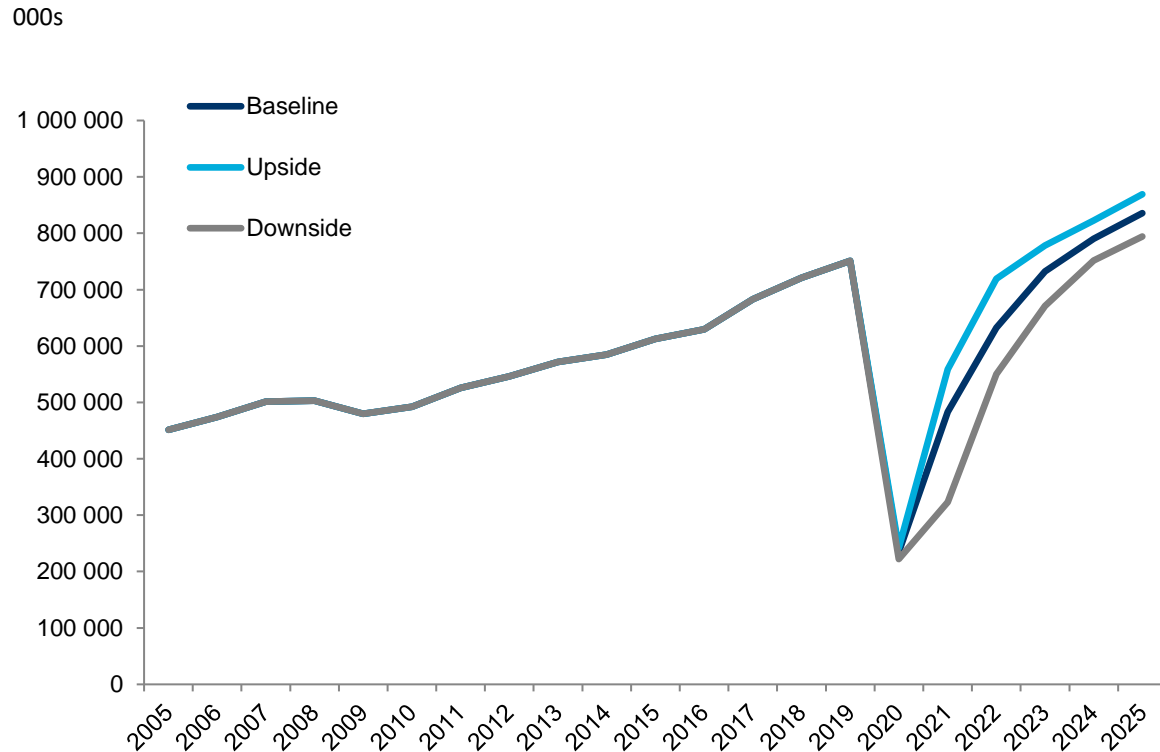


# The Long View



# The Outlook for Europe

**Inbound arrivals by scenario, 2005-25, Europe**

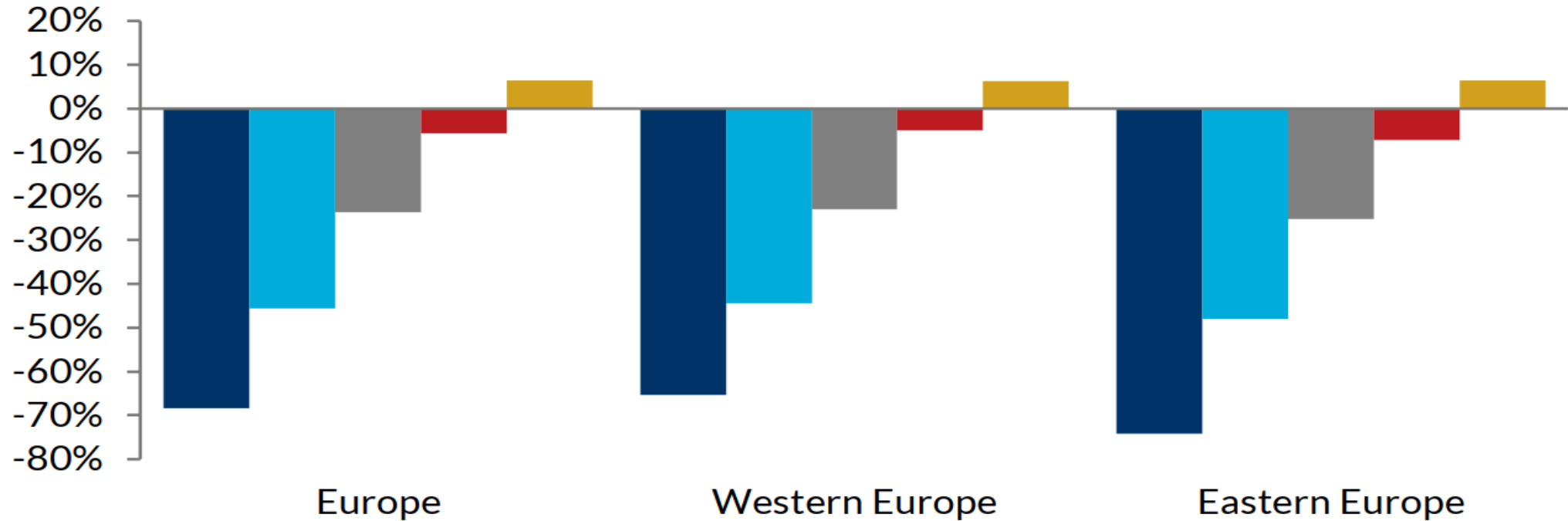


Source: Tourism Economics

- The vaccine benefits most likely from Q3 onwards
- While the pandemic elevated savings, medium-term legacy will be reduced affordability and greater price sensitivity.
- When travelling internationally travellers will choose destinations closer to home.
- Leisure travel will lead the way, business travel will lag.

# The Outlook for Europe by Region

**International arrivals by destination region, Europe, 2020-24**  
% difference from 2019 levels



Source: Tourism Economics

■ 2020 ■ 2021 ■ 2022 ■ 2023 ■ 2024

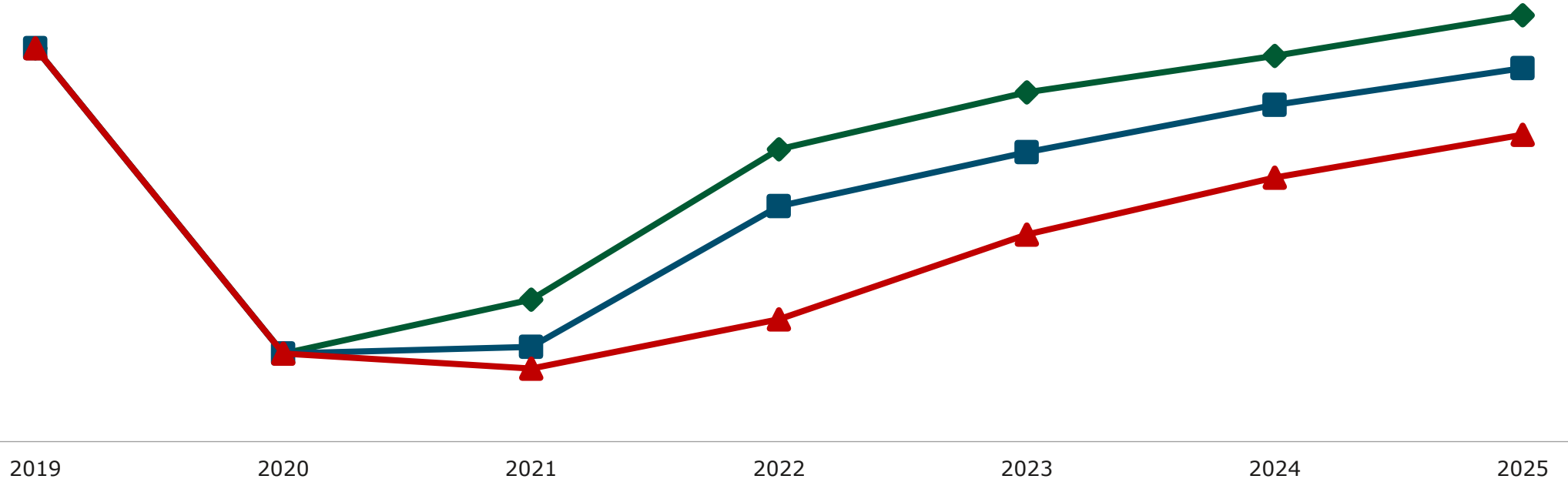
## **ITIC's Outlook Scenarios**

- **BASE LINE:** Based on current conditions – no international tourist flows before Sept/Oct '21 with mixed market response due to **uneven vaccination roll-outs**, and delays in establishing universal safe travel protocols. **Effective recovery delayed to 2022.**
- **OPTIMISTIC:** Travel restrictions removed by July '21, following effective and **on schedule vaccine roll-out** in Ireland and main source markets, together with **coordinated multilateral agreement** and implementation of safe travel protocols including testing and vaccination verification.
- **DOWNSIDE:** Further delay to restart due to **virus surges** or tail-risk fears; **lower vaccine effectiveness.**

# ITIC's Outlook for Ireland

## Recovery scenarios – Overseas tourist volumes (000s)

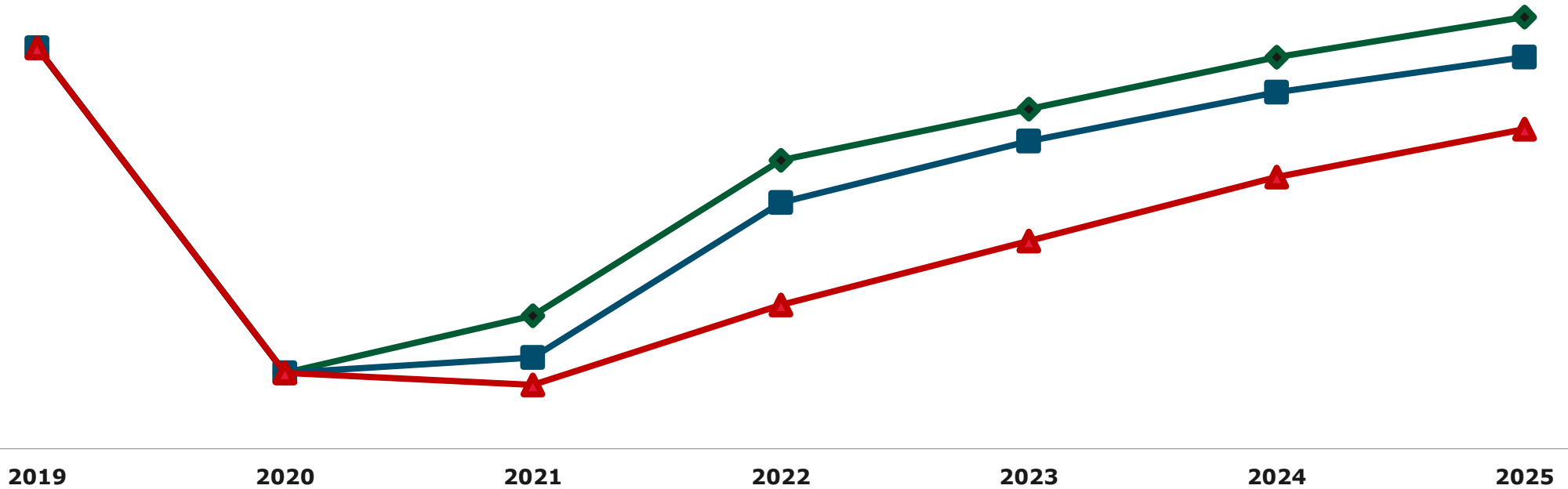
◆ Optimistic   ■ Base   ▲ Downside



# ITIC's Outlook for Ireland

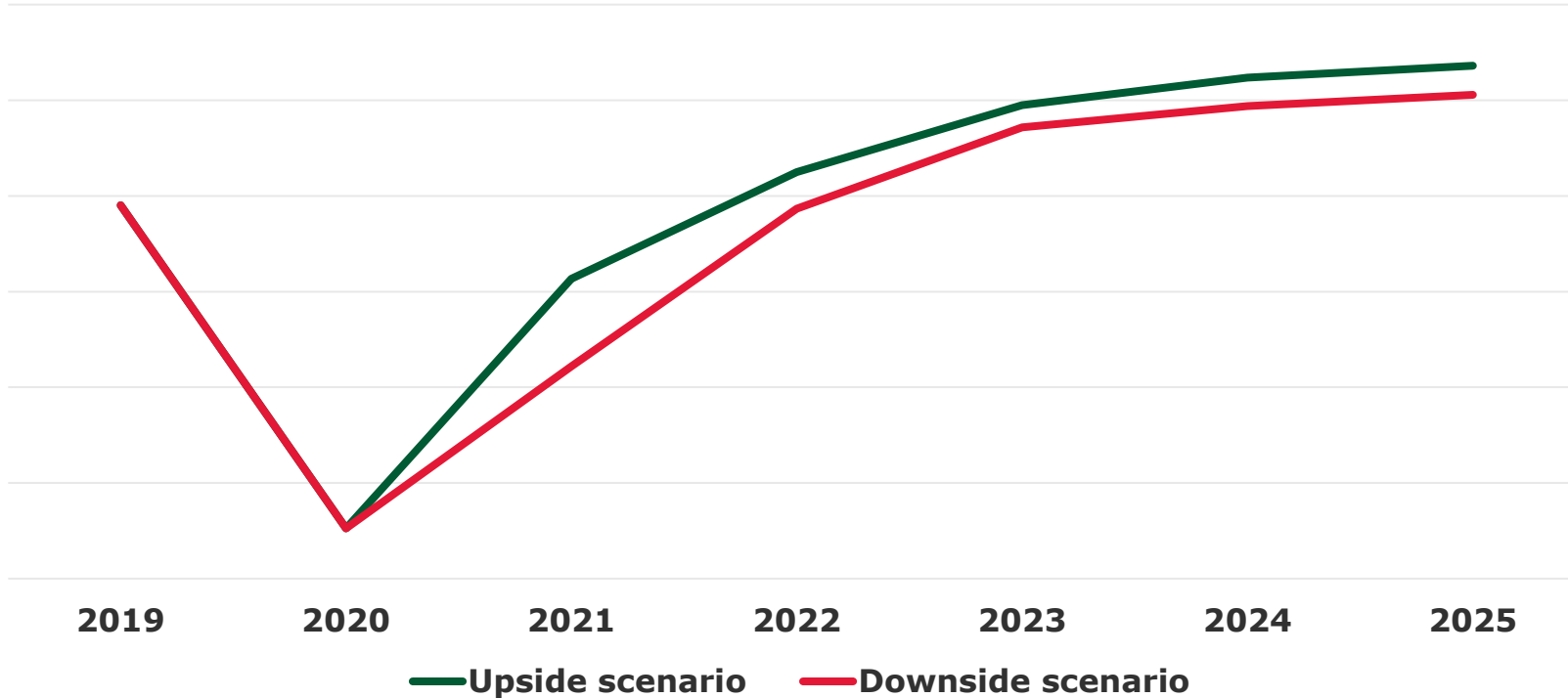
## Recovery scenarios – Overseas tourist revenue (€m)

◆ Optimistic    ■ Base    ▲ Downside



# Domestic Market Outlook from Tourism Economics

## Recovery Scenario - Domestic Tourist Trips



**Domestic market back to 2019 levels by**

- **2022 on the upside**
- **2023 under the downside.**

**Ongoing growth post-recovery.**



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# **Building Tourism Back Better**



## A changed context

- The pandemic has **dramatically changed the policy context.**
- Looking beyond the crisis, many countries are now exploring the opportunity to **fast track the move to greener, more sustainable tourism development.**
- An **integrated approach to tourism policy** is key to achieve this objective, with input and support from industry and communities.
- In particular emphasis is being placed on environmental sustainability, diversification, and innovation, prioritising visitor management over visitor numbers.

## **Tourism Policy Statement “People, Place, and Policy - Growing Tourism to 2025”**

The Government’s affirms and has agreed that it will place tourism as a key element of its economic strategy, with development in the tourism sector reflecting the highest standards of environmental and economic sustainability.

## **Sustainable Working Group**

- Tourism Action Plan 2019 – 2021
- Working group established to review international policy and best practice in sustainable tourism and propose guiding principles for sustainable tourism development in Ireland.
- Ambition: Ireland will seek to be amongst the world-leaders in sustainable tourism practices.
- 8 Principals

## **Faile Ireland**

- Continued need to ensure all tourism initiatives within the sector are planned, developed and managed in a sustainable and integrated manner. Environmental protection, economic competitiveness, community & visitor involvement and climate change awareness all play a part in successfully achieving and benefiting from this approach.
- The VICE (Visitor, Industry, Community and Environment) Model



**Survive to Thrive - Sustain Businesses (Short Term-Surviving – Long Term-Thriving)**



**Accelerate Domestic Tourism- Achieve a sustained step change in Irish staycations**



**Opening the Outdoors -Transform Ireland’s Outdoor Tourism Experience**



**Digital that Delivers - Transform Irish Tourism’s online presence and ecommerce capability.**



**Prepare the Pipeline - Support Industry in building a pipeline of future international business**



**Reducing the carbon footprint – of the tourism sector**



**Stay Safe - Ensure a best-in-class virus safe tourism sector for visitors, workers and community.**



**Delivering Excellence – Ensuring our delivery is best in class**

# **Faite Ireland – Redeveloped Strategy**

## 1. Opening the Outdoors

- Outdoor Dining
- Outdoor infrastructure & accessibility

## 2. Reduce Carbon Footprint

- Drive Change through Knowledge and Metrics
- Drive Change at the Level of the Business
- Drive Change in Transport Options within Ireland



**Thank you**