DESTINATION DUBLIN

A Collective Strategy for Tourism Growth to 2020

Contents

Foreword

Tourism brings much-needed foreign exchange, creates jobs and contributes to a better quality of life for Dubliners. The Grow Dublin Taskforce was established by Fáilte Ireland in late 2012 with the aim of reversing the downward trend in tourism to Dublin, which had begun in 2007, and driving growth to Dublin City and Region in the period to 2020.

THE TASKFORCE brought together senior stakeholders from industry, state agencies and local authorities with international destination experts to develop a seven-year strategy to achieve the shared goal of restoring growth from major markets.

Our point of departure was to take stock of a valuable body of pre-existing work on tourism and Dublin. The Taskforce then undertook research designed to put in place three vital foundation stones: a thorough understanding of the motivations and needs of key segments of potential visitors; insight into how Dublin is currently perceived as a place to visit; and a thorough grasp of competitor city destinations. This knowledge in turn enabled the crafting of a fresh articulation of Dublin as a destination – a proposition that is highly appealing, distinctive and inherently true.

To anchor our ambition for Dublin, a number of growth scenarios were considered. The most stretching scenario envisages growth in visitor numbers of 7% a year in the seven year period. In this scenario, the total number of visits reaches 6.2 million by 2020 with international tourist spending doubling to just under €2.5bn. The achievement of this target is predicated on an unprecedented level of collaboration among stakeholders, the maintenance of the prevailing level of public sector funding and the creation of a new private sector funding stream. Based on these assumptions, the strategy elaborates the actions that will deliver this growth.

The articulation of strategy is only the first step. Implementation is key. Successful implementation of this strategy will stand or fall on effective collaboration. Many parties have a stake in the success of this endeavour. Working in isolation, these individual stakeholders are powerless to effect the step change that is called for. However, working in unison, evidenced by our analysis of best practice in competitor cities, transformation can be wrought.

Therefore we propose a flexible Alliance of all stakeholders, taking a sectoral approach, to take this work forward. The intention is that this strategy document will serve as the template for the work of this Alliance. Assuming that the fine collaboration evident in the work of the Grow Dublin Taskforce prevails into the implementation phase, there is every cause for optimism about a successful outcome.

So this document should be read not as a body of work completed but as a call to action by all in the industry, by the relevant representative bodies, by the state agencies responsible for developing tourism, by tourism-related enterprises and by the citizens of Dublin, all of whom stand to benefit from the increase in economic activity generated by visitors.

Lucy McCaffrey, *GDT Chairperson*

‘THE GROW DUBLIN TASKFORCE STAKEHOLDERS LEARNED A GREAT DEAL AS WE WORKED. MOST IMPORTANTLY, WE LEARNED THAT SUCCESS WILL STAND OR FALL ON EFFECTIVE COLLABORATION. MANY PARTIES HAVE A STAKE IN THE SUCCESS OF THIS ENDEAVOUR. WORKING IN ISOLATION, THESE INDIVIDUAL STAKEHOLDERS ARE POWERLESS TO EFFECT THE STEP CHANGE THAT IS CALLED FOR. HOWEVER, WORKING IN UNISON TRANSFORMATION CAN BE WROUGHT. A FLEXIBLE ALLIANCE OF ALL STAKEHOLDERS WILL TAKE THIS WORK FORWARD. THE INTENTION IS THAT THIS STRATEGY DOCUMENT WILL SERVE AS THE ORCHESTRAL SCORE FOR THIS ALLIANCE, INSPIRING ALL THE PLAYERS TO PLAY IN UNISON’.

LUCY MCCAFFREY – Chair, The Grow Dublin Taskforce

Executive Summary

Since 2007, when 4.5 million visitors from overseas brought €1.45 billion into Dublin, the city and region has experienced a decline in tourist numbers and revenue. Tourist numbers in 2012 were down 18% from the 2007 peak, and revenues were down 12.6%. Over that period, Dublin has lost tourist business to cities that are positioned with greater clarity, stronger impact and more competitive appeal.

THIS HIGHLIGHTS THE NEED for a new tourism strategy for Dublin, underpinned by a compelling new Dublin brand proposition to redress this competitive deficit.

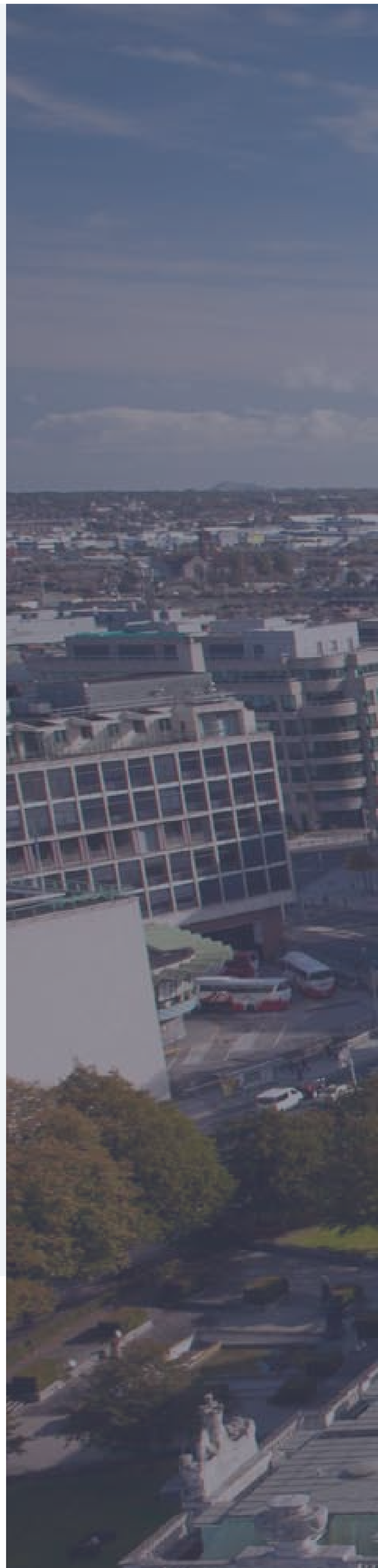
The Grow Dublin Taskforce was established in late 2012 with the aim of identifying how to bring substantial growth in tourism to Dublin city and region in the period to 2020. This was a senior tourism sector group representing major stakeholders in the public and private sectors. It consulted extensively throughout the tourism sector in Dublin City and Region in order to achieve consensus for the way forward.

The Taskforce conducted extensive research among visitors and potential visitors in key markets to determine their interests and motivations, and to identify the ways in which the Dublin offering addresses them. Based on that research the Taskforce set about developing a strategy to return Dublin to growth, underpinned by a new, compelling, and authentic Dublin proposition. This strategy and the new proposition will provide the basis for mobilising all stakeholders – public bodies, private enterprise and citizens – in developing and delivering a memorable visitor experience.

Throughout this document ‘Dublin’ refers to the wider Dublin region, comprising Dublin City Council, Fingal County Council, South Dublin County Council and Dún Laoghaire-Rathdown County Council.

The Challenge for Dublin

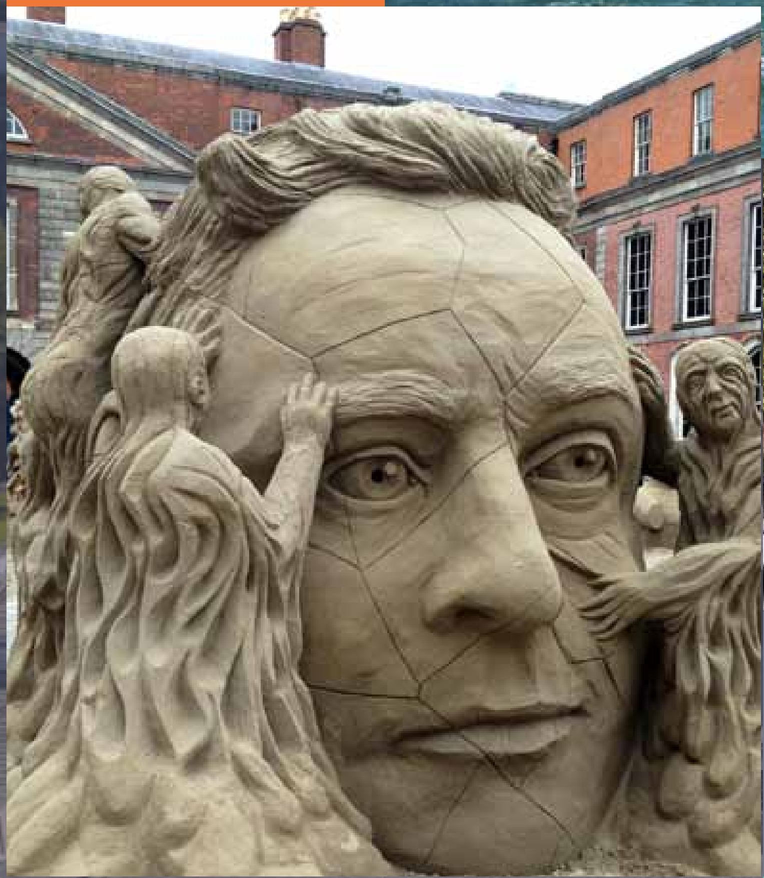
Tourism is important to Dublin – in terms of revenue from visitors and the jobs that it creates, as well as the contribution that it makes to the lives of people living in the wider Dublin area, comprising Dublin City and Region. However, Dublin is underperforming against its potential: although the last 2-3 years have shown the beginnings of a recovery, awareness of Dublin and what it offers the visitor is not well-known in our main potential markets; tourism to Dublin has declined since its peak in 2007; and most significantly, Dublin has slipped behind its main city competitors in Europe, cities that have shown sustained levels of 5-8% growth to which Dublin must aspire. Returning to 2007 levels and accelerating growth beyond this peak is an urgent priority for Dublin. This strategy sets out a clear roadmap for growing Dublin’s tourism in the years ahead, driven by an ambition to catch up with and exceed the growth levels of its competitors.











THROUGHOUT THIS DOCUMENT 'DUBLIN' REFERS TO THE WIDER DUBLIN REGION, COMPRISING DUBLIN CITY COUNCIL, FINGAL COUNTY COUNCIL, SOUTH DUBLIN COUNTY COUNCIL AND DÚN LAOGHAIRE-RATHDOWN COUNTY COUNCIL.

The Opportunity

While tourism into Dublin clearly benefits Ireland as a whole, Dublin needs to differentiate itself as a 'must-visit' destination for anyone visiting Ireland. In view of the growing trend towards more trips of shorter duration - particularly to cities - Dublin must distinguish itself as a stand-alone city destination and an aspirational European short-break destination. This is where there is a significant opportunity for Dublin: to combat a low level of awareness of what Dublin offers and communicate the variety and vibrancy of Dublin's attractions to a growing number of potential visitors in key target markets, where return on investment is likely to be greatest.

A Visitor-Focused Strategy

- The Grow Dublin Taskforce identified five sectors that offer potential for significant growth and the best return on investment: **'Social Energisers'** – young couples and adult groups looking for excitement, new experiences, and fun, social getaways to novel destinations.
- **'Culturally Curious'** – mostly older couples or solo travellers with time (and money) to spend.
- **Conference and incentive visitors**, whose expenditure is amongst the highest of all visitors and who are more prone to visit in times when cash flow for Dublin businesses is critical – in the shoulder and off-seasons.
- **Cruise visitors**, who come to Dublin as part of a European cruise.
- **Event visitors,** coming to Dublin specifically to attend an event or festival, whether sporting, cultural, business or any other type of event.

Focusing on these sectors represents a strategic decision to concentrate limited investment cost-effectively in attracting Dublin's best prospects where the greatest return on investment is likely to be generated. Other leisure segments can be expected to follow as a result of success with Social Energisers and the Culturally Curious, who are typically early adopters of trends.

A New Dublin Proposition

Having conducted extensive research in overseas markets to find out what prospective visitors look for when choosing a destination and having consulted Dublin stakeholders to assess Dublin's potential for meeting visitors' requirements, the Grow Dublin Taskforce distilled these findings into a proposition that captures Dublin's unique appeal for visitors:

> **'Dublin is the vibrant capital city bursting with a variety of surprising experiences – where city living thrives side by side with the natural outdoors.'**

This proposition, the elements in it, and the language through which it is articulated will permeate all our communications with our target markets. We envisage stakeholders in the industry will adopt it in their own marketing collateral; Dubliners will use it when talking with friends and colleagues abroad; experience developers will use it when designing new projects. N.B. As a proposition, this is a summation of Dublin's core competitive appeals, whose purpose is to guide the way in which Dublin is projected. It is not a marketing slogan or tagline.

A New Way of Working to Achieve Growth

The Grow Dublin Taskforce clearly identified that future success will depend on collaboration and cooperation between the various public bodies, industry groups, and service providers with an interest and stake in the tourism economy to an extent that has not happened optimally before. Together, the participants in the Grow Dublin Taskforce have subscribed to a unifying way forward to grow Dublin's tourism based on the new Dublin proposition:

> **'We will work together to unlock Dublin's vibrancy and diverse, surprising experiences.'**

'FUTURE SUCCESS WILL DEPEND ON COLLABORATION & COOPERATION BETWEEN THE VARIOUS PUBLIC BODIES, INDUSTRY GROUPS, AND SERVICE PROVIDERS...'

The way in which Dublin stakeholders will work together to apply this principle will be elaborated by the groups or organisations responsible for growing each sector, as resources are raised and allocated to each of the programmes proposed within this strategy.

The Grow Dublin Taskforce assessed three possible growth scenarios and agreed that the third, most ambitious, scenario identified below – 'Game-Changer/Peak Performance' – should be pursued, subject to raising sufficient funding to deliver it. There was agreement that a new stream of funding from the private sector will be necessary to make this a reality.

The three growth scenarios and the likely growth rate associated with each are as follows:

1

Scenario Status Quo = 'Business as Usual'.

If there is no change in policy, it is assumed that Dublin will maintain market share within the context of projected growth for Northern and Western Europe as a whole[1] at about 2.2% growth in visitors and 1% in revenue per year.

2

Scenario Improved Collaboration = 'Return to Growth'.

If tourism to Dublin were to resume the growth it enjoyed between 1999 and 2007, we could expect visitor numbers to grow by 4.7% a year, and visitor spending to increase by around 5% a year.

3

Scenario Game-Changer = 'Peak Performance'.

This is the most ambitious scenario, and the one the Grow Dublin Taskforce has agreed to pursue, subject to sufficient funding being raised. This would see the strategy being realised in full. This envisages widespread collaboration, with public funding maintained plus significant new private sector funding. It assumes that this funding model would be sustained throughout the target period; that the strategy would be fully implemented through the proposed collaborative Alliance; and that overseas marketing of Dublin would be repurposed to project the new Dublin destination brand in key markets.

1 United Nations World Tourism Organization (UNWTO) regional figures.

The Opportunity

In this scenario, if Dublin were to perform at the same level as the top quartile of European cities in the years 2008 to 2012, we could expect visitor numbers to grow by 7% a year, and visitor spending to increase by around 8.6% a year. The total number of visits would reach 6.2 million by 2020, representing a 70% increase on 2012 and a near 40% increase on the 2007 peak. International tourist spending in Dublin would almost double to just under €2.5bn.

Growth on this scale would require a significant increase in accommodation capacity. If the additional accommodation capacity was to be concentrated in hotels, then the number of rooms would need to increase by 25%-30%.

SUMMARY TABLE	
Growth in overseas spending (% pa)	8.6
Growth in employment* (% pa)	7.6
Growth in employment* (000s, cumulative)	19,600
Additional Tax Revenue	€ 775 million
Additional Overseas Revenue	€ 1.19 billion

TABLE 1

Action Plan

The thrust of this strategy is to maximise tourism numbers and value, in order to grow the economy of Dublin and thereby ultimately contribute to an improvement in the quality of residents' lives over time, as a result of the increase in foreign exchange and tax revenue. The plans developed by the Grow Dublin Taskforce aim to achieve this between now and 2020. They include specific programmes for each sector, cross-sector enabling projects, and hygiene-critical projects.

Sector-specific programmes

Sector-specific programmes are designed to address the development of the key sectors: Social Energisers, Culturally Curious, 'promotable' business tourism, events, and cruise tourism. These include:

- **'Dublin Now Plus'**: Expansion of the '*Dublin Now*' Pilot Action Plan into mainland Europe and US. This Action Plan has been centred on three work streams developed to overcome barriers to growth: industry engagement and collaboration; digital content and strategy; and in-market activation.
- **Bringing Dublin to life:** Dublin's diversity will be collated into a coherent and accessible experience-development framework under key themes across Dublin city and region (urban and extra-urban). This will drive both the evolution of segment-focused experience developments and Dublin's marketing communications. Core values of the new Dublin brand proposition will be integrated throughout to convey a sense of variety, vibrancy and surprise. The framework will also provide Dubliners with new ways to engage with their city and region and enable them to mediate and interpret it more effectively to visitors.
- **Dublin – a world-class business tourism destination:** 70% of business visitors to Ireland travel to Dublin. In 2011, international conferences accounted for almost 96,000 overseas visitors to Ireland and a revenue yield of approximately €135 million to the Irish economy, the bulk of which is spent in Dublin. Dublin, however, is far from fulfilling its potential. The city is well furnished with venues, accommodation, facilities, services and attractions. We aim to position Dublin in the world's top tier of conference and incentive destinations, by targeting conference organisers and potential delegates as well as incentive planners.

- **Dublin – a 'must-see' destination on a European cruise holiday:** Over the past decade, the number of cruise passengers into Dublin has tripled, with an average annual growth rate of 12.8 %. While cruise visitors spend considerably less per visit than the average visitor to Dublin, the number of cruise visitors to Dublin has passed 100,000 for the first time in 2013. To achieve optimum growth in visitor numbers and revenue, a Cruise Dublin Forum will be established to promote Dublin as a cruise destination to cruise operators, cruise agents and travellers planning a European cruise.

- **Dublin Events Forum**: A Dublin Events Forum will be established to bring stakeholders together and to facilitate collaboration for the mutual benefit of all involved in organising and bidding for events.

Cross-sector enabling projects

Cross-sector enabling projects are projects that transcend one or more of the key sectors and are not focused purely on one sector. They are also 'mission-critical' projects in the way that sector-specific projects are. These include:

- **Brand Dublin visual identity:** The new Dublin proposition needs a strong and coherent visual identity. This will help to identify participants in the brand activity, present merchandising opportunities for Dubliners and visitors, and effectively identify Dublin across all communications – both domestic and international.

- **Dubliners as advocates of Dublin as a tourist destination:** Dubliners can be the best ambassadors for their city and region if they have the knowledge and recognise the benefits they derive personally from tourism, in terms of employment, facilities and quality of life. The plan is to find ways to encourage Dubliners to broaden their mental map of the city and to encourage them to speak positively about the city and region to visitors and to their friends, colleagues and family abroad.

- **A powerful marketing communications strategy:** Awareness of what Dublin offers is low among potential visitors; many have a limited, and sometimes distorted, view of what the city and region have to offer. Addressing this will require a creative and highly targeted marketing communications strategy.

- **A comprehensive digital plan:** An interactive platform will be developed that enables communications between potential visitors, previous visitors and tourism experience providers. This will enable tourism service providers, event organisers, retailers and experience developers to have a conversation with potential visitors. It will also enable social communications between all interested parties as is now expected in the digital age. On a visionary level, we will seek to engage with some of the leading-edge technology companies in the city and leverage the extensive digital expertise that is based in Dublin in 'blue sky' thinking about the future. Our aim is to provide the best possible service for visitors through an innovative digital plan and simultaneously to position Dublin as a forward-thinking, vibrant city. In addition to the tourism benefits, this will reinforce Dublin's reputation as a leading technological hub.

The Opportunity

- **Improve ease of transport and access:** While Dublin is a relatively compact city, it can still be a challenge for visitors to find their way around. In particular, information on connections to the wider Dublin region can be hard to find, with the result that the visitor experience is diminished and tourism revenue is not maximised. We will identify ways to address this, such as better information and signage. Fáilte Ireland is currently working with Dublin City Council and the National Transport Authority to improve signage and public transport information to facilitate greater access, particularly to the wider region and the natural environment on Dublin's doorstep.

- **Improve accommodation capacity:** A significant increase in visitor numbers will create the need for more hotel beds, particularly in the city centre, and for better transport links between accommodation in the outskirts and the city centre. A first step is to provide visitor-oriented information on public transport links to areas outside the city centre where visitor accommodation is available.

Critical Success Factors

The Grow Dublin Taskforce examined the organisational and funding models employed by thirteen international competitor Destination Marketing Organisations (DMOs), with the aim of establishing best practice for organisational structure, business model, and stakeholder collaboration. Factors critical to the success of this strategy for growth are:

- **A collaborative relationship:** The process of developing this tourism strategy epitomises the collaborative relationship and approach required to achieve mutually agreed goals. This must continue into implementation and further planning stages in future. This needs to be based on mutual respect and an understanding of each other's objectives.

- **City and region-wide stakeholder engagement:** Engagement with stakeholders in the Dublin City and Region – at planning, design, implementation, and evaluation stages will be critical.

- **A sectoral approach:** Basing development and marketing plans on a sectoral approach – as in this strategy, which focuses on five sectors (Social Energisers, Culturally Curious, Business Tourism, Events and Cruise Tourism) – will both enable stakeholder collaboration and drive our approach to growth.

- **A project-based approach:** Undertaking discrete projects provides an action-focused approach for stakeholders to get involved in a city and region-wide project, where there is synergy with their own objectives.

- **A sustainable funding model:** Effective implementation of the Dublin tourism strategy requires a balance of funding from both the private and public sectors. The more collaborative and project-based the approach, the greater the likelihood of raising the level of funding required to make a difference.

Resourcing on a Collaborative Basis

Successful tourism destinations around the world work on a private-public partnership model, whereby resources are shared in pursuit of a common goal and the respective strengths of public and private sectors complement each other towards this end.

The Grow Dublin Taskforce and the tourism industry of the Dublin region do not assume that the State can guarantee its funding support at historic levels and neither does it need the additional cost of a new State agency for Dublin alone. The State has been a vital supporter of the sector's development to date and the benefits from tourism will continue to warrant public support into the future. However, the businesses which benefit from tourism in the Dublin region will also themselves invest increasingly in their own success, not least in response to the State's proactive steps in reducing VAT and removing air passenger duty, as well as appreciating the proven benefits of national programmes such as The Gathering.

The complex and multi-faceted nature of the tourism economy requires productive synergy between public and private sectors to provide conditions for growth: certain functions either cannot be, or are best not, delivered by the private sector alone, for example international destination marketing and city-brand curation. From these 'common ground' functions, the State receives payback on its investment, particularly from the private sector's operation of tourism services that generate employment, tax revenues and wider spending in the economy. Recognising these shared interests and the level of ambition inherent in our ambitious growth targets, the highest degree of public-private collaboration into the future is not only an option, it is essential.

This shared resourcing of the sector's future is not just about the respective cash contributions of public and private contributors to tourism in Dublin; it is also about sharing other important resources such as expertise, research, communications and digital technology, in a truly jointly-owned collaboration. This will build on the collaboration achieved under the *Dublin Now* initiative and be activated and brokered by the Grow Dublin Tourism Alliance. Joint-funding will be largely on a project basis, but within the broader context of the strategic aims of the core sectoral groups established to implement this strategy. This will not only underpin joint development of new visitor experiences and the marketing of Dublin, but it will also enable better joint input to the strategic plans and work programmes of all State agencies and private initiatives in other areas of Irish life, so that no opportunities are missed and the best mutual outcomes are achieved.

Measuring Progress

Evaluating progress will be vital to understand what works, ensure success and maintain stakeholder collaboration.

Detailed targets will be drawn up by the relevant groups or organisations as the implementation phase begins. Key performance indicators will cover both quantitative and qualitative measures: in addition to high-level quantitative measures relating to visitor numbers, revenue, market share, and employment creation, qualitative assessment will be undertaken in significant areas, including stakeholder engagement, communications effectiveness, visitor satisfaction and propensity to recommend Dublin, value for money, and brand impact.

'THE COMPLEX AND MULTI-FACETED NATURE OF THE TOURISM ECONOMY REQUIRES PRODUCTIVE SYNERGY BETWEEN PUBLIC AND PRIVATE SECTORS TO PROVIDE CONDITIONS FOR GROWTH'

The Opportunity

Next Steps

Maintaining the momentum generated by the Grow Dublin Taskforce in developing this strategy will be critical to achieving Dublin's growth objectives and to securing wider stakeholder buy-in to the way forward. A number of short-term actions have been identified as priorities in the first three months. These include:

Key Enabling Projects

- Establish the **Grow Dublin Tourism Alliance** to drive the strategy forward, with representatives from all committed stakeholders.
- Develop a brief for, and commission work on, the new **Dublin brand identity.**
- Identify key stakeholder partners, who will work together and commit resources towards a shared goal within the context of the **new private-public funding model**.
- Develop a high-impact **marketing communications and media plan** to promote the new Dublin proposition in overseas markets.
- Develop a **citizen engagement plan**. Produce a factsheet illustrating the new proposition, with key tourism facts (e.g. jobs, revenue etc.), and distribute it through key channels.
- Develop the first iteration of the framework to **Bring Dublin to Life**, including key themes, with inputs from Social Energiser and Culturally Curious experience-development teams.
- Develop the specifications for the **digital platform**. Identify a development partner.
- Develop the **visitdublin.com** site to create an expanded calendar of events, as well as building on existing information over the wider Dublin City and Region.

Actions to Attract More Visitors for Major Events

- Establish **Events Dublin Forum** to bring together key stakeholders, including event organisers, and accommodation and service providers, and develop a major events strategy.

Actions to Attract More Leisure Visitors

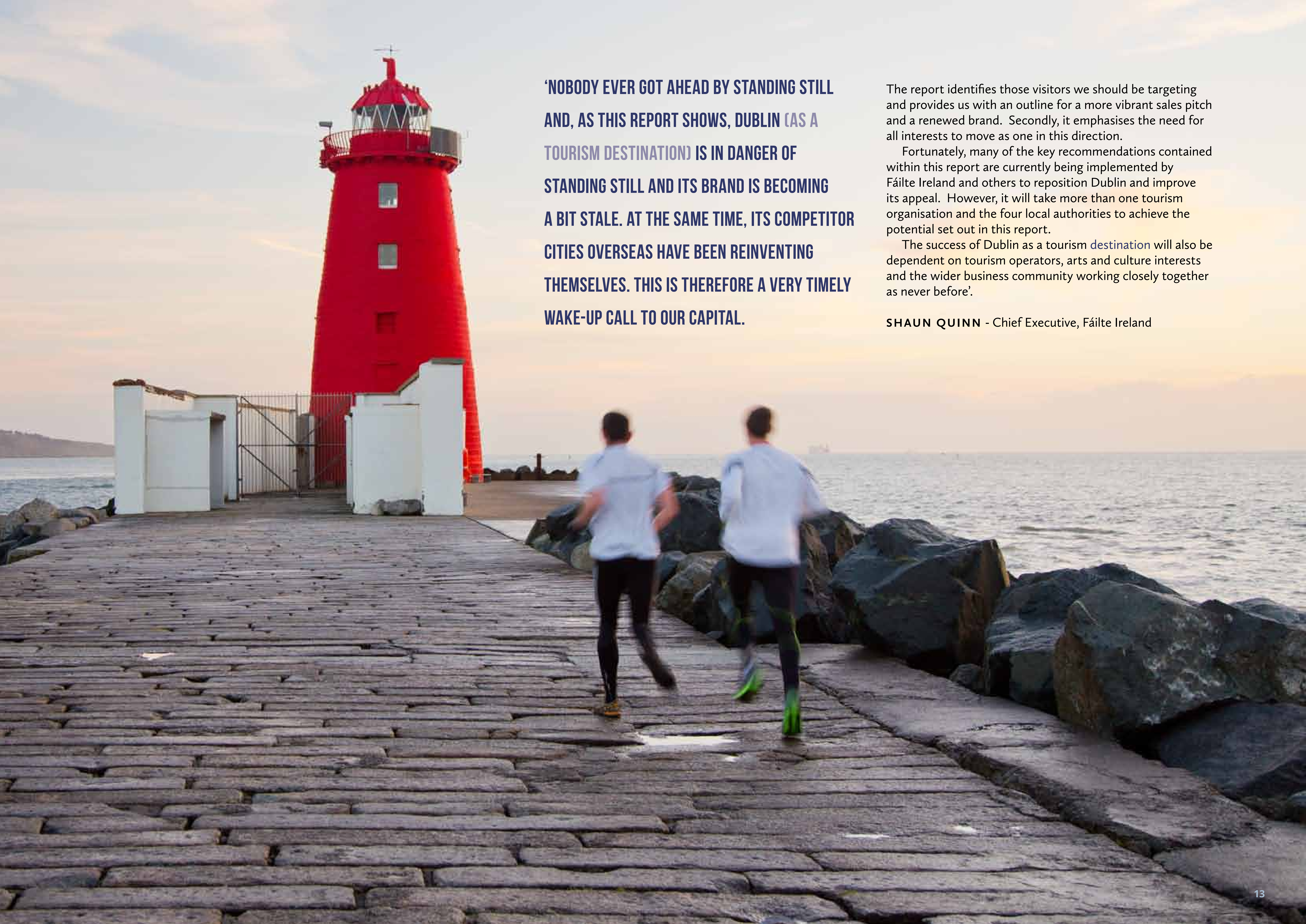
- Start to extend 'Dublin Now' initiative for Social Energisers into other geographical markets ('**Dublin Now Plus**').
- Identify and develop **partners with complementary interests in promoting Dublin to Social Energisers and the Culturally Curious** – such as leading edge digital companies. Outline plan of activities for the year ahead.

Actions to Attract More Business Visitors

- Develop a large **conference bid strategy** with key stakeholders.

Actions to Attract More Cruise Visitors

- Formally establish a **Cruise Dublin Forum** to bring together all relevant stakeholders and develop a strategy for attracting and catering for more cruise traffic.



‘NOBODY EVER GOT AHEAD BY STANDING STILL AND, AS THIS REPORT SHOWS, DUBLIN (AS A TOURISM DESTINATION) IS IN DANGER OF STANDING STILL AND ITS BRAND IS BECOMING A BIT STALE. AT THE SAME TIME, ITS COMPETITOR CITIES OVERSEAS HAVE BEEN REINVENTING THEMSELVES. THIS IS THEREFORE A VERY TIMELY WAKE-UP CALL TO OUR CAPITAL.

The report identifies those visitors we should be targeting and provides us with an outline for a more vibrant sales pitch and a renewed brand. Secondly, it emphasises the need for all interests to move as one in this direction.

Fortunately, many of the key recommendations contained within this report are currently being implemented by Fáilte Ireland and others to reposition Dublin and improve its appeal. However, it will take more than one tourism organisation and the four local authorities to achieve the potential set out in this report.

The success of Dublin as a tourism destination will also be dependent on tourism operators, arts and culture interests and the wider business community working closely together as never before’.

SHAUN QUINN - Chief Executive, Fáilte Ireland

1

INTRODUCTION – THE CHALLENGE

What has been the focus of the Grow Dublin Taskforce?

How valuable is tourism to the Dublin economy?

How has Dublin performed in recent years?

The Challenge for Dublin

Tourism is important to Dublin – in terms of revenue from visitors and the jobs that it creates, as well as the contribution that it makes to the lives of people living in the wider Dublin area, comprising Dublin City and Region.[2] However, tourism to Dublin has declined since its peak in 2007, although the last 2-3 years have shown the beginnings of a recovery.

MOST SIGNIFICANTLY, Dublin has slipped behind its main city competitors in Europe, cities that have shown sustained levels of growth to which Dublin must aspire. Returning to 2007 levels and accelerating growth beyond this peak is an urgent priority for Dublin. This strategy sets out a clear roadmap for growing Dublin's tourism in the years ahead, driven by an ambition to catch up with and exceed the growth levels of its competitors.

The Opportunity

While tourism into Dublin clearly benefits Ireland as a whole, Dublin needs to differentiate itself as a "must visit" destination for anyone visiting Ireland. In view of the growing trend towards more trips of shorter duration - particularly to cities - Dublin must distinguish itself as a stand-alone city destination and an aspirational European short-break destination. Dublin is not just the capital of Ireland; it should aim to present itself as the capital of the Irish experience. This is where there is a significant opportunity for Dublin: to combat a low level of awareness of what Dublin offers and communicate the variety and vibrancy of Dublin's attractions to a growing number of potential visitors in key target markets, where return on investment is likely to be greatest.

Grow Dublin Taskforce

The Grow Dublin Taskforce was established to assess how Dublin could achieve this growth and regain lost competitive ground. Its work comprised two distinct components:

2 The term Dublin is used throughout this strategy document to refer to Dublin City and Region, comprising Dublin City Council, Fingal County Council, South Dublin County Council and Dún Laoghaire-Rathdown County Council.

1

Development of a compelling destination brand for Dublin:

The continued global growth in outbound tourism – both business and leisure – suggests an underlying market opportunity for Dublin. Research shows that Dublin's tourism offering is widely underestimated by potential visitors; it seems indistinct; it is often seen as part of a generic blended image of Ireland as a whole. In some markets, it is seen as one-dimensional or offering less variety and excitement than is actually the case.

This indicates a need to reinvigorate the Dublin experience; to revitalize the Dublin brand and communicate it in a compelling way to Dublin's best visitor prospects; and to galvanize stakeholders to work effectively together to grow Dublin's tourism.

A core pillar of this strategy is the development of a clear, contemporary destination brand for Dublin. This addresses the informational and emotional deficit unearthed in research, which was characterized by: limited knowledge, erroneous perceptions and no real sense of the "feel" of Dublin, compounded by different approaches to promotion by different stakeholders, and a focus largely restricted to the city centre.

2

Development of a powerful strategy, agreed by Dublin's tourism stakeholders:

Capitalizing on this opportunity requires tourism stakeholders in Dublin City and Region to work more effectively together, in order to deliver a stunning visitor experience and to communicate Dublin's attractions to prime target audiences.

This strategy has been developed through extensive consultation with tourism stakeholders in Dublin City and Region. The Grow Dublin Taskforce and the sector groups that contributed to the development of this strategy involved senior representatives from national organizations, local authorities and tourism industry bodies/businesses. The formulation of this strategy has been underpinned by visitor research in Dublin's key international markets. Consequently this is a robust, evidence-based and future-oriented strategy for growth, which sets a direction for tourism to Dublin towards 2020 and which is shared by a wide and diverse range of stakeholders in Dublin City and Region.

A new, vibrant Dublin proposition will provide a customer-focused basis for inspiring stakeholders to collaborate more effectively together in pursuit of a shared goal: to increase the volume and value of tourism to Dublin City and Region. The Taskforce's vision and earnest hope is that, by working together, Dublin's tourism sector will be able to benefit from increased synergy and economies of scale while attracting more visitors to the whole of the Dublin City and Region, comprising the areas under the remit of the Dublin City Council, Fingal County Council, South Dublin County Council and Dún Laoghaire-Rathdown County Council.[3]

Delivering the step change envisaged by the Taskforce will also require improvements in the delivery of visitor experiences and a long-term commitment by stakeholders across the tourism industry to maintain the spirit of collaboration exemplified by the Taskforce in drawing up this strategy.

3 Dublin City and Region.

The Challenge for Dublin

The Economic and Social Value of Tourism

The Value of Tourism to Ireland

Tourism makes a major contribution to Ireland's economy, bringing in around €4 billion in revenue from overseas visitors.[4] The number of overseas visits to Ireland grew by 1% in 2012 to 6.3 million and is expected to grow by around 7% in 2013.[5]

This performance against a background of global economic difficulties, and a European recession, demonstrates the resilience of tourism as an economic contributor for Ireland. More significantly it demonstrates the potential for Dublin if the City and Region can position itself powerfully, develop experiences that inspire key markets, and reinforce this with adequate marketing investment.

The tourism sector employs 137,700 people nationally in the accommodation and food sectors alone,[6] with nearly 200,000 working in tourism businesses.

In Ireland as a whole, the power of tourism to create jobs is estimated as follows:

- Every €1m of tourist expenditure helps to support 34 tourism jobs.
- Every 63 international tourists help support one tourism job.
- 1,000 additional tourists support 15 jobs in the tourism industry.
- Additionally, the impact of tourism reaches far beyond industries traditionally associated with tourism. The indirect effect of tourism in terms of creating jobs in the tourism supply chain is significant in businesses that supply goods and services to the tourism industry, such as food producers, retailers, distributors and haulage companies, printers and marketing service providers, electricians, artists and entertainers, laundries, and many, many more.

The Importance of Tourism to Dublin City and Region

3.64 million overseas visitors spend almost €1.3 billion in Dublin and the wider Dublin region.[7] This spending has a significant effect in terms of business profitability and employment. Dublin has over 151 hotels, a vast number of restaurants and retail outlets, and a wide range of events and attractions, a significant part of whose income is derived from visitors. These businesses benefit directly from tourism revenue. Their suppliers also benefit from the demand for goods and services created by visitors – bakers, farmers, laundries, web designers, printers, electricians, musicians and many more.

'3.64 MILLION OVERSEAS VISITORS SPEND ALMOST €1.3 BILLION IN DUBLIN AND THE WIDER DUBLIN REGION'.

4 Fáilte Ireland, Tourism Facts 2012 (pub Oct 2013)
5 Figures for Jan-Oct 2013: GB + 5%; mainland Europe + 6%; North America +15%.
6 Report of the Tourism Renewal Group, 2009
7 €1.267 bn from overseas visitors, €246m from domestic visitors, €104m from Northern Ireland – per Fáilte Ireland, Overseas Visitors to Regions 2009-2012 and Associated Revenue (pub July 2013), of which just over half were on holiday (1.881 m).

So too do the state and local authorities, as a result of increased tax revenue – much of which is invested in improving facilities and services for residents. It is estimated that around 50,000 people in Dublin depend wholly or largely on tourism for their income. In addition, visitor revenue helps support many leisure and entertainment facilities – from theatres and galleries to restaurants and events – that enhance Dubliners' quality of life.

Reversing the Decline

In recent years tourism to Dublin, like other sectors of the economy, has shown a decline across major market segments. The number of overseas holidaymakers fell by 23% between 2007 and 2012, and the number of business visitors [8] fell by 16% over the same period. Overseas visitor revenue declined from a high of €1.45 billion in 2007 to €1.11 billion in 2011, with a slight rise to €1.267 billion in 2012.

Visitor numbers from all Dublin's traditional volume markets have declined since the 2007 peak, as shown in the table 1.

Visitor expenditure in recent years from Dublin's major markets has shown a decline from Great Britain, a decline that appears to be turning around from mainland Europe and North America, and a similar pattern, at a much lower level of volume, from other long-haul markets.

AREA OF ORIGIN OF ALL OVERSEAS VISITORS TO DUBLIN (2003-2012)[9]

Year	Great Britain		Mainland Europe		North America		Other Long Haul		Total[10]
	Nr. '000s	% of total	Nr. '000s	% of total	Nr. '000s	% of total	Nr. '000s	% of total	Nr. '000s
2012	1,090	29.9	1,582	43.4	687	18.9	282	7.7	3,641
2011	1,310	35.0	1,531	40.9	652	17.4	246	6.6	3,739
2010	1,202	35.2	1,362	39.9	610	17.9	238	7.0	3,412
2009	1,446	37.3	1,583	40.8	634	16.4	213	5.5	3,876
2008	1,689	39.2	1,680	39.0	674	15.6	267	6.2	4,310
2007	1,743	39.2	1,711	38.5	761	17.1	235	5.3	4,450
2006	1,864	43.3	1,483	34.4	732	17.0	226	5.2	4,305
2005	1,931	49.0	1,175	29.8	625	15.9	206	5.2	3,937
2004	1,819	49.4	965	26.2	644	17.5	252	6.8	3,680
2003	1,798	52.5	922	26.8	552	16.0	173	5.0	3,445

TABLE 1

EXPENDITURE BY ALL OVERSEAS VISITORS TO DUBLIN (€ M) (2009-2012)[11]

Year	Great Britain	Mainland Europe	North America	Other Long Haul
2012	253	547	291	176
2011	251	496	216	144
2010	235	487	258	173
2009	321	629	270	148

TABLE 2

8 Figures relate to overseas visitors only.

9 Source: Fáilte Ireland, Overseas Visitors to Regions 2009-2012 and Associated Revenue.
N.B. Changes in CSO methodology in 2009 mean there is a slight discontinuity from 2009 onwards compared with previous years.

10 Overseas visitors only – excludes domestic and Northern Ireland visitors.

11 Source: Fáilte Ireland, Overseas Visitors to Regions 2009-2012 and Associated Revenue.

The Challenge for Dublin

More significantly, when looking at 'discretionary' or 'promotable' visitors from Dublin's main volume markets – those whom it is possible to influence to visit, such as leisure, incentive and conference visitors, as opposed to those whose business requires them to travel and who are therefore not open to influence in the choice of their destination – the decline in holiday visitors to Dublin from Great Britain is marked. However, holiday visitor numbers from mainland European and North America suggest a tentative return to growth.

HOLIDAY VISITORS TO DUBLIN FROM MAIN MARKETS ('000S) (2012)[12]			
Year	Great Britain	Mainland Europe	North America
2012	364	855	291
2011	548	799	216
2010	438	706	258
2009	529	821	270

TABLE 3

EXPENDITURE BY ALL VISITORS TO DUBLIN (2012)				
	Great Britain	Mainland Europe	North America	Other Long Haul
Total spend (€ m)	€ 253	€ 547	€ 291	€ 176
Spend per visitor	€ 232	€ 346	€ 425	€ 624

TABLE 4

The visitor expenditure table below shows the differential levels of expenditure by region and demonstrates the rationale for continuing to focus on stimulating business from Dublin's traditional markets in the period to 2020 as the geographical markets offering the greatest volume potential.

It was against this background that the Grow Dublin Taskforce[13] (GDT) was established in late 2012 with the purpose of bringing stakeholders together from across the tourism sector in Dublin City and Region to address the fall in visitor numbers and revenue since 2007, and to develop a plan for restoring and accelerating growth in the period to 2020.

Building on Existing Insights

To develop a deep understanding of what drives visitors to choose one destination over another, the Grow Dublin Taskforce drew upon existing research. It also carried out a programme of new research and consultation, both with the tourism industry in Dublin and with consumer groups (including previous visitors and potential visitors) in key overseas markets.

As a starting point, the Grow Dublin Taskforce built its analysis on the earlier '*GB Path to Growth*' work completed by the Tourism Recovery Taskforce, which analysed the tourism market in Great Britain and elaborated a strategy for restoring growth from Ireland's largest source market of overseas visitors. Two other recent initiatives informed the Taskforce's analysis of Dublin's current situation and opportunities:

- The Irish Tourist Industry Confederation's report, 'Capitalising on Dublin's Potential', which analyses both the challenges and opportunities facing tourism in the city, and its target markets. It provides a series of recommendations on how best to strategically manage and develop the international marketing of Dublin.
- The work of the Creative Dublin Alliance – a network led by the Dublin City Manager, with members from local government, commerce, industry, education, state agencies and the not-for-profit sector – which is engaged under Activating Dublin in a number of projects, including a roadmap for building and managing Dublin's reputation and image, and an effort to engage citizens in identifying what makes Dublin unique.

In light of the progress of its main competitors (e.g. Amsterdam, Copenhagen, Berlin and Edinburgh), the Grow Dublin Taskforce recognized the need to reposition Dublin in the minds of potential visitors and to propel Dublin into their "must-visit" list in order to achieve the objective of growing tourism numbers and value.

'THIS NEW APPROACH TO PROMOTING DUBLIN MUST RECOGNIZE THE NEED FOR EXPERIENCES THAT WILL INSPIRE AND THRILL OUR VISITORS'

12 Source: Fáilte Ireland, Dublin Trends 1999-2012.

13 Membership of the Grow Dublin Taskforce is given in Appendix A.

The participants in the Taskforce recognized that 'business as usual' would result in a continuing loss of market share, and that a step change was needed.

This calls for a fresh, reinvigorated approach to promoting Dublin; one that needs to be consistently implemented and sustained over a significant period in order to achieve traction.

This new approach to promoting Dublin must recognize the need for experiences that will inspire and thrill our visitors, thereby ensuring that they return home as enthusiastic advocates of Dublin. It must be characterized by a continual search for improvement in both marketing tactics and visitor experiences and by greater collaboration amongst all those with an interest in the success of Dublin as a tourism destination.

Collaboration is not just desirable for reasons of cost efficiency and synergy; it is essential because the visitor experiences Dublin every moment of every day. As well as tourism-specific activities, visitors participate in the everyday life of Dublin, through normal, casual interactions with Dubliners – in shops, on buses, and in businesses whose main focus is to cater for local residents. However, every one of these encounters has the potential to affect the visitor positively or negatively. That is why there is such a premium on collaboration – to ensure that Dublin puts on its best show at every turn - because the visitor will not discriminate between services provided for residents and those for visitors. The impression of Dublin the visitor will take away will be built up by each and every one of these experiences.

The Need for a Fresh Way of Working

The international economic slowdown has undoubtedly contributed significantly to Dublin's decline from its 2007 peak. However, this does not tell the whole story, as some cities have grown even through difficult economic circumstances. Significantly, Dublin has lost market share compared to several of its major competitors during this period (e.g. Amsterdam, Copenhagen, Berlin and Edinburgh), which have grown at between 5% and 8% per annum over several years, reflecting their strong destination brand impact and competitive appeal. By contrast, overseas visitor numbers into Dublin have decreased by an average of 3.9% a year over the past six years, and revenues have decreased by an average of 2.7%.

In exploring how we can catch up on our competitors during consultation with stakeholders in developing this strategy, a range of barriers to the successful performance of Dublin as a tourism destination were identified.

Three of the major barriers identified were:

- Low awareness and limited perceptions of Dublin in main markets;
- Funding poorly employed to achieve adequate market penetration;
- Variable collaboration amongst stakeholders to propel Dublin forward.

Other barriers related to:

- A need for improved visitor experiences;
- Inadequate information for visitors – in terms of online and printed visitor information as well as directional and interpretive signage;
- Transport and public realm issues;
- Personal safety concerns;
- Residents' lack of awareness of the value of visitors;
- The imperative to engage Dubliners as advocates of their own city and region.

By means of this strategy, the Grow Dublin Taskforce has identified how these barriers can be overcome and how Dublin can regain its international competitiveness. This involves centralised strategic planning and a compelling customer-centric destination brand. Critically, it requires those involved to work in collaboration, thereby optimising both marketing expenditure and efforts in developing and improving the visitor experience.

The Challenge for Dublin

The Need for a Strong and Compelling Destination Brand

In recent years the needs of visitors have changed. By not adapting to these changing requirements quickly enough, Dublin has lost market share. The Grow Dublin Taskforce recognises that a more visitor-centric approach to marketing and experience development, as well as a more strategic, collaborative effort will be necessary to regain market share.

Key competitor cities, such as Amsterdam, Copenhagen, Berlin and Edinburgh have successfully positioned themselves in the minds of travellers as interesting and exciting destinations to visit through sound strategic planning, resulting in sustained growth. The fieldwork carried out as part of the Grow Dublin Taskforce project revealed that potential visitors are either not aware of Dublin and its attractions, or have a limited view of the city, considering it to be dusty and dull, with little of interest to see or do.

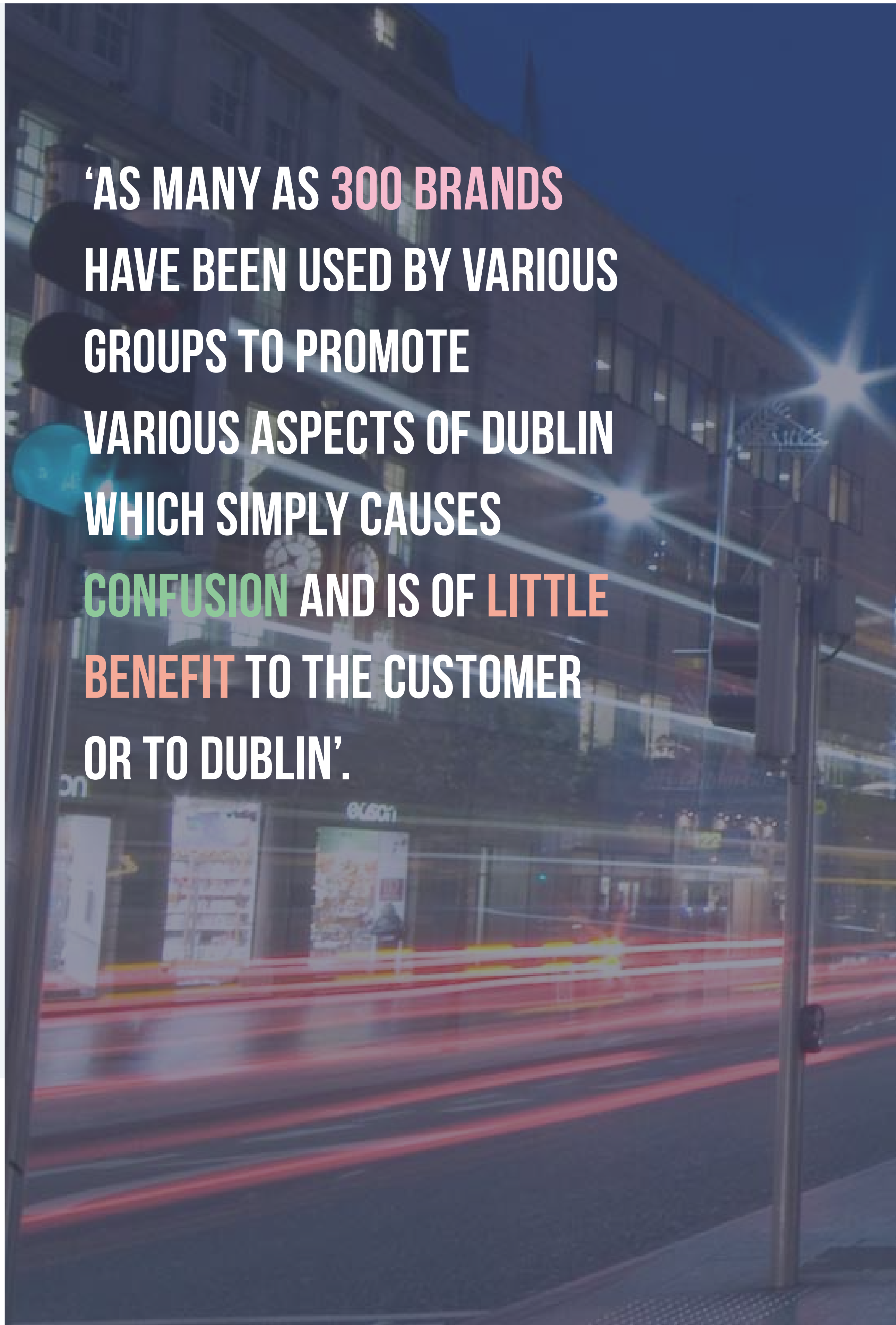
This points to the need for a new, strong, compelling Dublin brand proposition as part of a powerful new strategy to redress the competitive deficit and places a new Dublin brand proposition at the core of this tourism strategy.

A destination brand represents the city's personality in the eyes of the potential visitor. It represents a set of promises for the visitor. It is not just the sum of a destination's assets and appeals, it is also, importantly, the expectations, memories, stories and associations that prospective visitors have of the place. It is the essence of the destination that endows it with its character in the eyes of its visitors, both existing and potential - its competitive identity, which differentiates the destination from all others in an appealing way.

As many as 300 brands have been used by various groups to promote various aspects of Dublin which simply causes confusion and is of little benefit to the customer or to Dublin.

A new brand proposition is required to reinvigorate Dublin in the eyes of its potential visitors, in order to close the gap with Dublin's competitor cities. This new brand proposition will drive not only the marketing of Dublin but also the development of tourism experiences in Dublin. It will act as a rallying call to galvanise Dublin stakeholders behind a coherent and inspiring identity for the city and region.

The Grow Dublin Taskforce has set out to build a strategy that will inspire stakeholders and Dubliners to work together and become positive advocates for the city and region. By underpinning this strategy with a fresh, vibrant new Dublin brand proposition, it aims to provoke both Dubliners and potential visitors to re-evaluate the city and region and explore what it has to offer, with the intention of promoting a new wave of engagement with Dubliners, inspiring investment and driving a commitment to visit.



‘A DESTINATION BRAND REPRESENTS THE CITY’S PERSONALITY IN THE EYES OF THE POTENTIAL VISITOR’.

2

THE OPPORTUNITY FOR GROWTH

What is the potential for growth?

Where do Dublin's future opportunities lie?

Which segments offer the best prospects for Dublin?

Growth Projections

The Grow Dublin Taskforce's aim is to create a destination brand for Dublin that will provide potential visitors with compelling reasons for choosing Dublin over its competitors. This will be underpinned by an experience-development and marketing strategy aimed at delivering significant growth in tourism to Dublin City and Region by 2020.

Dublin now has the opportunity to close the competitive gap between its current performance and that of its main competitors. The Grow Dublin Taskforce considered three possible scenarios[14] for the future of tourism in Dublin, based on varying levels of activity and investment by the tourism sector:

1 Scenario
Status Quo = 'Business as Usual'.

IF THERE IS NO CHANGE IN POLICY – that is if the product offering, branding, marketing and cooperation amongst the various stakeholders remain at present levels – it is assumed that Dublin would maintain market share within the context of projected growth for Northern and Western Europe as a whole[15] and that recent trends in spend per visit would persist. In this scenario we would still lose market share against our key competitor cities and therefore underperform against our potential:

We would expect visitor numbers to grow by 2.2% a year, and visitor spending to increase by 1% a year. This would result in overseas tourist visits to Dublin reaching 4.35 million by 2020, compared with 3.64 million in 2012, a cumulative increase of just under 20%. This would, however, still represent a failure to recover to the 4.44 million peak reached in 2007 and, with spending by overseas visitors in 2020 of €1.38bn (in 2012 prices), tourism revenue would also still be significantly lower than the peak level of €1.5bn in 2007.

2 Scenario
Improved Collaboration = 'Return to Growth'.

IF TOURISM TO DUBLIN WERE TO RESUME THE GROWTH that it enjoyed between 1999 and 2007, we could expect visitor numbers to grow by 4.7% a year, and visitor spending to increase by around 5% a year. This is based on recreating past success, and is close to the growth rate (4.2%) projected in the Medium Scenario featured in the ITIC report 'Capitalising on Dublin's Potential'.

This scenario would see total overseas visits to Dublin reach 5.3 million by 2020, representing a cumulative increase of 45% on the 2012 outturn and 18% above the 2007 peak. It would result in spending by overseas tourists increasing by a cumulative 48% over the 2012-2020 period, or at an annual average rate of 5% per annum, to reach just under €1.9bn in 2020. This would require in the region of a 10% increase in accommodation capacity, bearing in mind an anticipated reduction in the average length of stay since 2007 as a result of an increase in short breaks.

14 These scenarios are underpinned by a robust economic analysis, which is available in appendix A.

15 United Nations World Tourism Organization (UNWTO) regional figures

3

Scenario
Game-Changer = 'Peak Performance'.

THIS SCENARIO ANTICIPATES THE STRATEGY BEING REALISED IN FULL as a result of seamless collaboration, maintenance of public funding levels, and significant new private sector funding.

If Dublin were to perform at the same level as did the top quartile of European cities in the years 2008 to 2012, we could expect visitor numbers to grow by 7% a year, and visitor spending to increase by around 8.6% a year. In this scenario, the total number of visits would reach 6.2 million by 2020, representing a 70% increase on 2012 and a near 40% increase on the 2007 peak In this scenario overseas tourist spending in Dublin would almost double to just under €2.5bn. Growth on this scale would require a significant increase in accommodation capacity. If the additional accommodation capacity was to be concentrated in hotels, then the number of rooms would need to increase by 25%-30%.

By contrast, and to give this aspiration perspective, Berlin grew by almost 11% and Copenhagen by more than 8% in international bednights between 2008-2013, compared to a European average growth rate of +5% over this period.

Projections such as these are dependent on a great many variables, only some of which are within our influence. However, the Grow Dublin Taskforce is confident that by creating a compelling destination brand for Dublin, by developing experiences that excite potential visitors, and by working more effectively together to propel Dublin's tourism economy forward, we can realise the potential for significantly greater visitor numbers and revenue.

These steps will be underpinned by a sound assessment of global trends, a clear analysis of the markets and segments that offer the greatest potential, and by looking further afield to learn from international best practice. By implementing these steps, we can look forward to growth and begin to restore Dublin's competitiveness against our main European city competitors.

8,6%

IF DUBLIN WERE TO PERFORM AT THE SAME LEVEL AS DID THE TOP QUARTILE OF EUROPEAN CITIES IN THE YEARS 2008 TO 2012, WE WOULD EXPECT VISITOR NUMBERS TO GROW BY 7% A YEAR, AND VISITOR SPENDING TO INCREASE BY AROUND 8.6% A YEAR.

Global Tourism Drivers

The drivers behind trends in global tourism, and those that will influence travel motivation from Dublin's main markets over the coming years, can be summarised as follows:

AUTHENTICITY
Visitors increasingly value 'real' experiences, rather than those transparently designed for tourists. Feeling they have experienced the real Dublin, as opposed to aspects of Dublin created specifically for visitors, is important.

ESCAPE
With urbanisation on the rise, city living is rapidly increasing. Visitors want to escape the frenetic, pressured pace of city and work life on a break that gives them a window of relaxation and reconnection with themselves, their partner, friends or family. They want to experience a different city at a slower pace or in a different light, to exchange hassle for fun. This also often involves the natural environment for its tranquillity, freshness and breathing space.

IMMERSION
Visitors want to feel immersed in the city and involved from the inside, as opposed to looking in. They want to live it, not just look at it.

FLEXIBILITY
Visitors are becoming a lot more flexible in terms of when and where they work and when and where they play. The division between work time/place and leisure time/place is blurring. This means that, while they want to "kick back", visitors often still want the option of being able to be in touch with friends, family and business colleagues back home. It also indicates a potential growth in increasingly "hybrid" visitors, who combine business and leisure in the same visit.

EXPERIENCE
As daily life becomes increasingly frenetic and complex, travel presents an opportunity for release and freedom; visitors crave spontaneous, unique and novel experiences. They are no longer destination collectors, but experience-seekers.

EFFORTLESSNESS
Based on their experience with technological innovations such as mobile phones and tablets and improved customer service, consumers have become used to the idea of fast, efficient service with minimal effort on their part. It must be easy for them to choose their destination, to make their travel and accommodation arrangements, to decide what to see and do, and to find their way around while there.

'WHAT REALLY GIVES A CITY ITS EDGE IS THE UNDISCOVERED, THE OPPORTUNITY FOR IMMERSION. TRAVELLERS MIGHT WANT TO DO SOME OF THE STANDARD ADVERTISED STUFF BUT WHAT THEY REALLY WANT IS IMMERSION AND GETTING UP CLOSE AND PERSONAL WITH THE CULTURE OF THE PLACE. I WAS TRAVELLING A FEW WEEKS AGO AND I FOUND THIS GREAT CAFÉ WITH A BLACKBOARD OUTSIDE WITH 'NOT IN LONELY PLANET GUIDE BOOK' ON IT, THAT WAS ITS CLAIM TO FAME'.

TOM BUNCLE –
Destination Branding Expert

COMPETITION FOR VISITORS IS INTENSE. As strongly branded, 'must-see' European destinations, London, Paris and Rome are in the top tier. However, these traditionally iconic destinations are increasingly being challenged by other cities. Barcelona and Istanbul already receive more visitors than Rome; in fact, if current trends continue, Istanbul will overtake Paris in terms of international visitor arrivals by 2016, to become the second most visited city in Europe[16] (after London).

The cities that we measure ourselves against – our main competitors – include Amsterdam, Prague, Berlin, Copenhagen and Edinburgh. In each case, these cities have consistently not only built on their longstanding visitor appeal and powerful image, but they have also adopted a strategic approach to constantly improving the visitor experience and ensuring that their city lives up to its visitors' expectations. In particular they have focused single-mindedly on the following actions:

- Attracting their core visitor segments – those that will deliver the greatest return on investment;
- Working in partnership across their cities;
- Pursuing a highly strategic and business-focused approach to drive their city's international competitiveness;
- Additionally, several have worked with organisations beyond the tourism sector to project their appeal.

In order to close the competitive gap, Dublin needs to adopt a similarly strategic approach which is business-focused and competitive. Dublin also needs to regularly review the range of experiences available to ensure they meet our visitors' requirements

Our current competitive set.

Tier 1.
MEGA cities with iconic attractions.

London
Paris
Rome

Tier 2.
Non MEGA - interesting cities with iconic attractions.

TABLE A	TABLE B
Vienna	Stockholm
Madrid	Copenhagen
Barcelona	Florince
Amsterdam	Venice
Istanbul	Brussels
Prague	Edinburgh
Berlin	Dublin

Tier 3.
Cities with a less defined destination offering.

Budapest	Manchester
Lisbon	Bruges
Oslo	Bilbao
Munich	Riga
Cologne	Glasgow
Seville	
Dubrovnik	
Warsaw	
Krakow	

Dublin falls behind Tier 1 & Tier 2 cities in terms of visitor numbers.

16 MasterCard Global Destination Cities Index 2013, cited in http://www.forbes.com/sites/andrewbender/2013/06/07/bangkok-tops-the-worlds-10-most-visited-cities/

Where Will Growth Come From?

The main opportunities for growth up to 2020 will come from Dublin's traditional volume-producing markets. These have been identified, firstly, in geographical terms by country, and secondly, by market sector. Underlying this assertion is an assessment of their potential to deliver the best return on marketing investment. An analysis of all overseas visitors to Dublin shows that 60% are between the ages of 19 and 44, and only 6% are under the age of 19. 65% of our visitors travel alone or in couples,[17] with the balance travelling in larger groups or families.

Geographical Markets

CITY TOURISM, AND A TREND towards taking short breaks in particular, is growing in popularity amongst visitors from our traditional, volume-producing markets, such as Great Britain, France, Germany and, to a lesser extent, the USA.The main focus of this strategy up to 2020 is to grow visitor numbers and value from mainland Europe and North America, as well as to regain growth from Great Britain, through implementation of the Tourism Recovery Taskforce "*GB Path to Growth*" strategy.

Tables 5 to 7 below show the projected visitor numbers by geographical market in the three scenarios considered by the Taskforce.

17 This reflects the importance of business travel into Dublin.

Status Quo = 'Business as Usual'

TABLE 5

	INTERNATIONAL TOURISM					
	VISITOR NUMBERS			VISITOR SPENDING		
	2012 (000s)	change (%, cum)	2020 (000s)	2012 (€mn)	change (%, cum)	2020 (€mn)
GB	1090	18	1286	253	9	275
N America	687	24	851	292	14	334
France	273	19	324	94	1	95
Germany	281	15	322	97	- 3	95
Other Europe	1028	16	1193	356	- 1	351
Rest of World	282	33	373	176	33	233
TOTAL	**3641**	**20**	**4349**	**1267**	**9**	**1383**

Improved Collaboration = 'Return to Growth'

TABLE 6

	INTERNATIONAL TOURISM					
	VISITOR NUMBERS			VISITOR SPENDING		
	2012 (000s)	change (%, cum)	2020 (000s)	2012 (€mn)	change (%, cum)	2020 (€mn)
GB	1090	37	1490	253	37	346
N America	687	48	1016	292	48	432
France	273	42	387	94	42	134
Germany	281	42	400	97	42	138
Other Europe	1028	42	1460	356	42	505
Rest of World	282	82	511	176	82	319
TOTAL	**3641**	**45**	**5265**	**1267**	**48**	**1874**

Game-Changer = 'Peak Performance'

TABLE 7

	INTERNATIONAL TOURISM					
	VISITOR NUMBERS			VISITOR SPENDING		
	2012 (000s)	change (%, cum)	2020 (000s)	2012 (€mn)	change (%, cum)	2020 (€mn)
GB	1090	52	1660	253	52	385
N America	687	88	1291	292	88	549
France	273	63	444	94	63	154
Germany	281	63	459	97	63	159
Other Europe	1028	63	1674	356	63	579
Rest of World	282	130	648	176	130	404
TOTAL	**3641**	**70**	**6176**	**1267**	**76**	**2230**

Potential Growth Sectors for Dublin

In developing this strategy, the Grow Dublin Taskforce assessed where growth might come from, taking into account the following factors: global tourism trends; the historic and current volume of visitor numbers and expenditure for Dublin; anticipated outbound market growth; Dublin's ability to match visitor motivation with an appropriate supply of tourism products and experiences; and the potential for return on investment in development and marketing.

The sectors identified as offering the best potential for Dublin were:

- **Leisure Tourism**
  - *Social Energisers*
  - *Culturally Curious*
- **Events Tourism**
- **Cruise Tourism**
- **Business Tourism**

Sector working groups were then established to develop plans for each sector. The working groups identified barriers to growth, addressed the opportunities, and examined the actions required to maximise the potential of each sector. They assessed visitor product and experience development needs, collaboration opportunities and marketing issues. The main programmes and enabling projects proposed to drive growth in each sector are outlined in chapter 5. The detailed plans for each sector are included in the appendices.

Leisure Tourism

Leisure tourism accounted for some 1.88 million holidaymakers[18] to Dublin in 2012, spending an average of €348 per person in Dublin. Leisure tourism offers significant potential for development, but it is also the area that has suffered the most serious decline – down by 22% at its peak in 2007.

Much of this decline can be attributed to external factors, such as the international recession and the 2010 ash cloud, but the negative trend started sooner – in 2005 in Great Britain – before these factors exerted an influence.

Leisure visitors vary considerably in their age profile, spending power, mode of travel, interests and motivations, needs and expectations. The challenge is to identify and target those who will offer Dublin its greatest return on marketing investment. Dublin has great strengths. We need to focus our marketing on where we will make the biggest impact rather than deploy limited marketing resources in targeting too wide a range of visitors. This strategy therefore identifies the most relevant and influential market segments for Dublin, the segments that will be excited and inspired by what Dublin has to offer and that will offer the greatest return on marketing investment over the target period to 2020.

Identifying the most valuable market segments for Dublin is critical. The recent "*GB Path to Growth*",[19] identified seven distinct market segments, each with different characteristics and different motivations for choosing their vacation destination. This proved a valid starting point for assessing the potential of different segments in various markets for Dublin. While this research was driven by Great Britain, we identified the relevance of most of these segments, and the Social Energisers and Culturally Curious in particular, across Dublin's main overseas markets.

18 Includes those visiting family or friends, as well as those holidaying in Dublin. Source: Fáilte Ireland, Overseas Visitors to Regions 2009-2012 and Associated Revenue (pub July 2013)

19 *GB Path to Growth*, The Tourism Recovery Taskforce, 2012

Potential Growth Sectors for Dublin

SOCIAL ENERGISERS	CULTURALLY CURIOUS	GREAT ESCAPERS	TOP TENNERS	EASY-GOING SOCIALISERS	NATURE LOVERS	SPOIL US
Young couples and adult groups looking for excitement, new experiences, and fun, social getaways to novel destinations. They typically want city breaks that offer fun, social engagement and a range of day- and night-time activities.	Mostly older couples or solo travellers with time (and money) to spend. They are independent 'active sightseers' looking to explore new places and broaden their minds. They want to 'do a place', both its culture and the beauty of its landscape. They respond well to a breadth of information, and of all the groups are best disposed towards Ireland as a destination.	Younger couples, some with babies or young children. They typically want to spend time together in a relaxed urban environment, and are also interested in active exploration of the countryside.	This group tends to be younger, with families. They do not have a holiday 'agenda' but are very active on holiday, engaging in many activities. They are looking to have a fun time with their partners and to occupy the children. For this group, relaxation is an additional benefit but not a priority.	Couples, often older (many 45+), somewhat inactive, looking to slow down and relax, enjoy local food and company and perhaps explore their surroundings. However, they tend not to be big sightseers.	This is the oldest group (many 55+); they are seeking simple rural retreats where they can enjoy the beauty and peace, do a little sightseeing and enjoy some gentle exploration.	This group do little on holiday; they want to completely relax, spoil themselves and enjoy sensory pleasures like food and drink and perhaps a little pampering.
• 17% warm to ROI • 10% warm to NI • 48% under 34 • 38% single adult or adult only households • 25% C1	• 22% warm to ROI • 9% warm to NI • 68% over 45 • 54% couples or retired couples • 48% B, C1	• 15% warm to ROI • 9% warm to NI • 29% couples • 44% B, C1	• 16% warm to ROI • 11% warm to NI • 62% under 45 • 38% families	• 19% warm to ROI • 11% warm to NI • 73% over 45 • 30% retired households • 44% C2, D, E	• 11% warm to ROI • 5% warm to NI • 83% over 45 • 34% retired households	• 14% warm to ROI • 6% warm to NI • 40% 35-54's • 41% couples and families with young babies

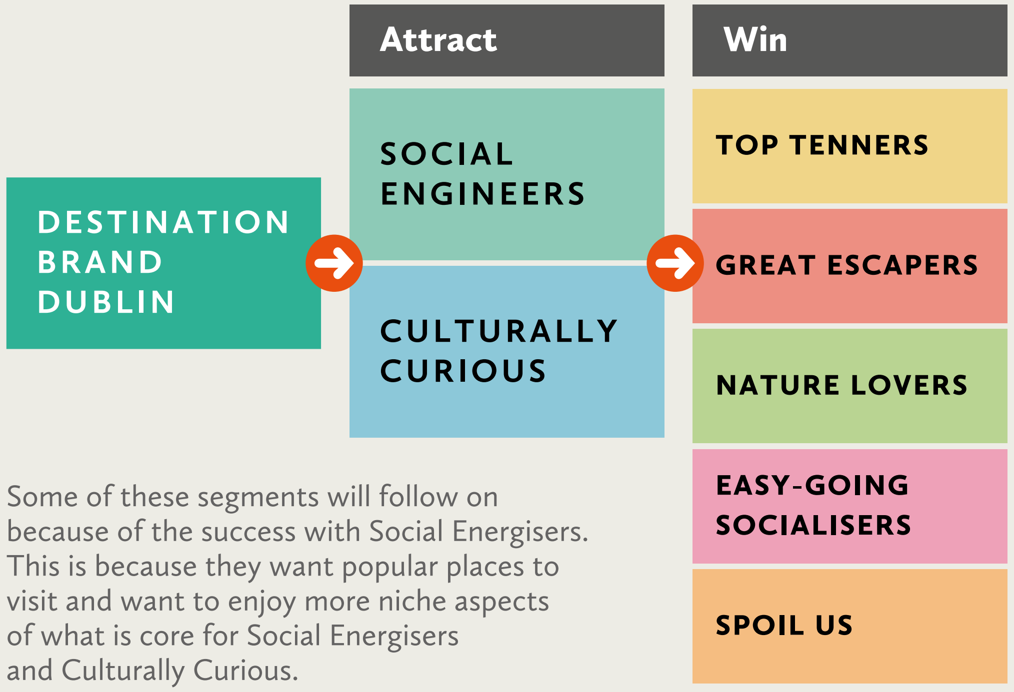
The leisure segments identified as offering the greatest potential for Dublin (Social Energisers, aged 19 to 30; and Culturally Curious, aged 44+) were selected because they offer a good potential return on marketing investment. They represent a significant number of outbound travellers in key geographical markets that have consistently delivered the most leisure visitors to Dublin. They have an interest in the types of experiences that Dublin can offer and are relatively resilient travellers who can not only afford to travel, but are also more likely than most to consider travelling outside the main season when Dublin needs to attract visitors to spread the benefits they bring and thereby help businesses maintain their cash flow.

Typically, as early adopters, they tend to set trends that others follow. By targeting these segments, Dublin will also reach several other segments, partly because many of the marketing communications will cover several segments, but also as a result of word-of-mouth and social media endorsement by satisfied visitors in our prime segments, as illustrated in the slide below:

These two segments – Social Energisers and Culturally Curious – offer Dublin's best potential in all main markets – GB, mainland Europe and North America. However, the emphasis will vary according to each segment's potential in different markets (e.g. the Culturally Curious segment is likely to be dominant in North America).

Delivering on motivations

Delivering on motivations that appeal to Social Engineers & Culturally Curious will attract 5 additional segments.



Some of these segments will follow on because of the success with Social Energisers. This is because they want popular places to visit and want to enjoy more niche aspects of what is core for Social Energisers and Culturally Curious.

Potential Growth Sectors for Dublin

Social Energisers – Profile

Social Energisers are typically young couples or adult groups who are travelling together in search of excitement, new experiences and fun. Their holidays are social occasions, and they seek out places that are 'new', vibrant and different. They tend to live at an intense pace and indulge themselves in exciting experiences when they travel.

Their aspiration is to have a good time, and to share their adventures with friends. They love novel experiences and exploring new places – the more out-of-the-ordinary and exciting, the better. They are attracted to places where there's a lot to do in a relatively small area, so that they don't have to plan too far ahead, and can be surprised and delighted by what they find 'by accident'.

Social Energisers have a broad range of needs and motivations. When they visit a city, they want to be active day and night, and will seek out interesting events, fun activities with local colour. Essentially, they explore the city for its vibrancy and unique atmosphere and are likely to try to pack in many activities and experiences. Social Energisers want to go home exhausted, but with lots of memories and plenty of stories to tell.

Social Energisers need to be convinced that Dublin really is a lively, energetic city, with plenty to see and do, day and night. Dublin needs to position itself as a city with a 'cool' edge, to be seen as unique and offering an experience that cannot be had anywhere else. While Social Energisers do need a vibrant nightlife, they will want to know that there is more to Dublin nightlife than overcrowded pubs. Revealing edgy clubs, authentic restaurants, music venues, theatres and other social attractions that are easy to access and part of the culture of a modern European capital will be of paramount importance. The prospect of Dublin as more than just an urban space, but also a city by the sea, fringed by mountains and full of green spaces and water in the city itself, also needs to be communicated to Social Energisers with an active and 'green' story that adds an unexpected dimension to their visit. For some this will provide a scenic or romantic backdrop; for others the prospect of outdoor activities and adventure.

Culturally Curious – Profile

Culturally Curious visitors are in general middle-aged couples with time to spend and are independent 'active sightseers', who wish to explore new places and broaden their minds. They want to experience a place, its authentic culture and its natural environment. While they comprise a range of different types of couples, most are 'empty-nesters', who are curious, delighted to discover the world for themselves again, no longer having the responsibility of looking after young children.

They like to indulge their senses and experience the sights, the sounds, the smells, and the tastes that are characteristic of the destination. They enjoy connecting with nature and getting off the beaten track. They like people to show a genuine, as opposed to purely service-driven, interest.

They want to feel they've connected with local people. They seek personal fulfilment, often by learning intriguing facts and gaining new insights about the place they're visiting. They strongly appreciate personal guides, but also like to be free to explore on their own. They are self-reliant; they won't choose a brand or visit a place purely to follow a trend.

They are generally seeking a less intense experience than Social Energisers. They have more time and more money to spend. They like a mix of culturally rich city experiences and a taste of the great outdoors. They value authenticity, and are particularly averse to offerings that are constructed solely for tourists.

The challenges in addressing this market are mainly ones of perception. People considering a city break are unsure that Dublin has enough to offer, enough to ensure that their days will be filled with the variety and depth of experiences that make their visit worthwhile and memorable. There is considerable competition – from cities such as Prague, Amsterdam, Berlin and Edinburgh. Dublin needs to establish an image and reputation that holds up against such competition. It needs to deliver a surprisingly varied and vibrant experience in both the city and its coastal and mountainous hinterland, which fulfils its marketing promise and inspires the Culturally Curious to speak enthusiastically about Dublin on their return home, so that they might inspire others to re-evaluate what Dublin has to offer and consider visiting.

Dublin's location has much to offer this group – it has all the attractions of a clean, safe, modern, European capital; a rich history and a vibrant, contemporary cultural life; a marine and rural hinterland that is readily accessible by public transport. That it is located on the sea, with clean beaches within 20 minutes of the city centre, with numerous golf courses in spectacular locations, a range of mountain walks, and a number of beautiful parks – all these are major attractors for the Culturally Curious, but there is a gap between their perceptions and Dublin's reality. Our strategy must ensure that these aspects of the real Dublin are presented to potential visitors in a compelling way, so that their misconceptions are converted into interest and a desire to visit.

When resources are limited and competition is intense, it makes sense to focus on the best prospects in some depth, rather than target all segments with insufficient impact. Although the Social Energisers and Culturally Curious segments have been targeted as offering the best return on marketing investment, this does not mean that other segments will be ignored. Other segments will also be exposed to messages about Dublin from time to time in media that are used to target the two main segments, as well as through social media and word-of-mouth from these trend-setting segments.

BUSINESS TOURISM – Profile

The second largest 'promotable' sector for Dublin is the discretionary business tourism sector. While there are a number of sectors within business tourism, the focus for this strategy is on those sectors that can be successfully promoted (conferences and exhibitions, incentive travel, and corporate meetings), chiefly incentives and conferences.

Business Tourism to Ireland grew by 10%, from 943,000 business visitors in 2011 to 1 million in 2012, of which an estimated 70% (c. 700,000) comes to Dublin. Conference and incentive visitors not only spend considerably more per trip than leisure visitors (spending on average € 1,400 per conference visitor nationally and € 1,350 per incentive visitor, whereas taking all visitors into account, the average spend per visitor to Dublin is € 348), but they are also the largest spenders of all types of business visitor.

Potential Growth Sectors for Dublin

The market for conference and incentive tourism is highly competitive, but the rewards are significant. Dublin is competing not just with other European cities, but also with cities around the world to host international conferences and attract incentive programmes. As well as generating immediate revenue, major business events also help to promote and internationalise the city to a global audience. Delegates who leave with a positive impression are likely to become unofficial ambassadors for Dublin and may return as leisure visitors.

'A SIGNIFICENT NUMBER OF HIGH PROFILE EVENTS TAKES PLACE EACH YEAR ON A ONE OFF BASIS'.

EVENTS TOURISM – Profile

The power of events to attract visitors, particularly in the shoulder and off season when leisure visitors are hardest to attract, is widely recognised. This includes a range of events: cultural, sporting, business, entertainment etc. Like conferences and incentives, events offer an opportunity to deliver business at a time when it is most needed outside the main season, thereby contributing towards businesses' cash flow and profitability. Business performance in the shoulder and off-seasons can sometimes make the difference between staying in business or not.

A significant programme of high profile events takes place each year or on a one-off basis, which attracts visitors to Dublin – from sporting events such as the Croke Park Classic, 6 Nations Championship matches, and the Big Start of the Giro d'Italia to concerts at the 02. Other, lower profile and niche events also play their part in attracting overseas visitors on a regular basis.

This strategy identifies the need to:

- Support existing significant events and, where appropriate, to build on them;
- Encourage the mounting of new events, which reflect Dublin's new brand values;
- Bid for internationally mobile events that Dublin could deliver, which might reinforce Dublin's new brand values.

Activities proposed to develop events that will stimulate visitors to travel to Dublin are outlined in chapter 5 and, in more detail, in the Events Sector Plan appendix.

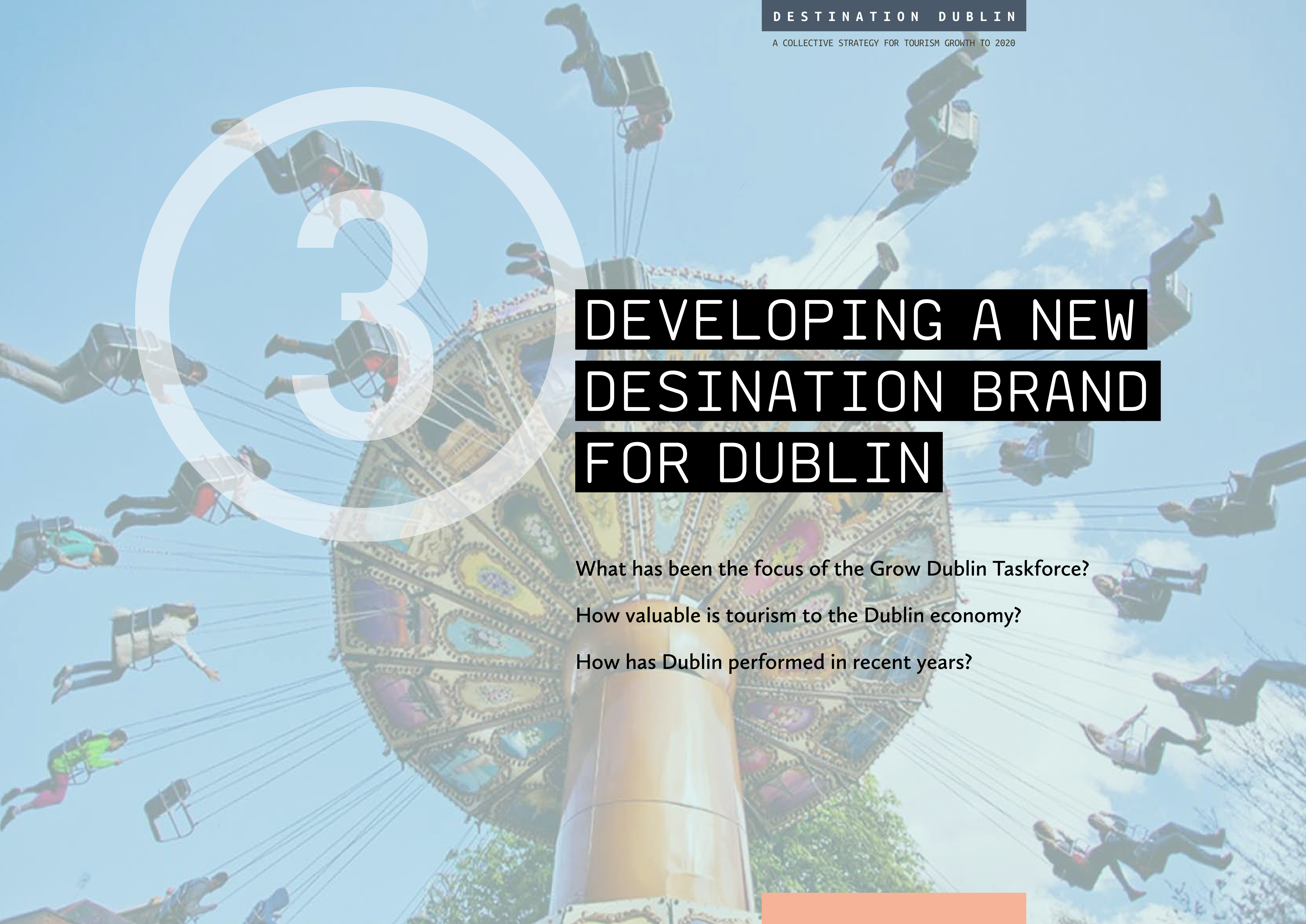
CRUISE TOURISM - Profile

Over the past decade, the number of cruise passengers into Dublin has tripled, with an average annual growth rate of 12.8%. Not requiring accommodation, cruise visitors spend less per visit than the average visitor to Dublin. However in 2013 the number of cruise visitors to Dublin passed 100,000 for the first time. Cruise tourism therefore offers an opportunity to attract additional tourism to Dublin. This will be mainly through the attraction of more ships into Dublin City and Region, as well as by encouraging cruise passengers to consider choosing an itinerary that includes Dublin.

Activities proposed to develop cruise tourism are outlined in chapter 5 and, in more detail, in the Cruise Sector Plan appendix.

'I WAS VERY INSPIRED BY THE COLLABORATION ACROSS SUCH A BROAD RANGE OF STAKEHOLDERS ON THE GROW DUBLIN TASKFORCE, LEADING TO REALLY INSIGHTFUL FINDINGS. WE ARE VERY ENCOURAGED BY THE NEW CONSUMER-CENTRIC STRATEGY FOR DUBLIN AND LOOK FORWARD TO WORKING TOGETHER IMPLEMENTING IT IN OUR PRIORITY MARKETS OVERSEAS'.

NIALL GIBBONS – Chief Executive, Tourism Ireland



3

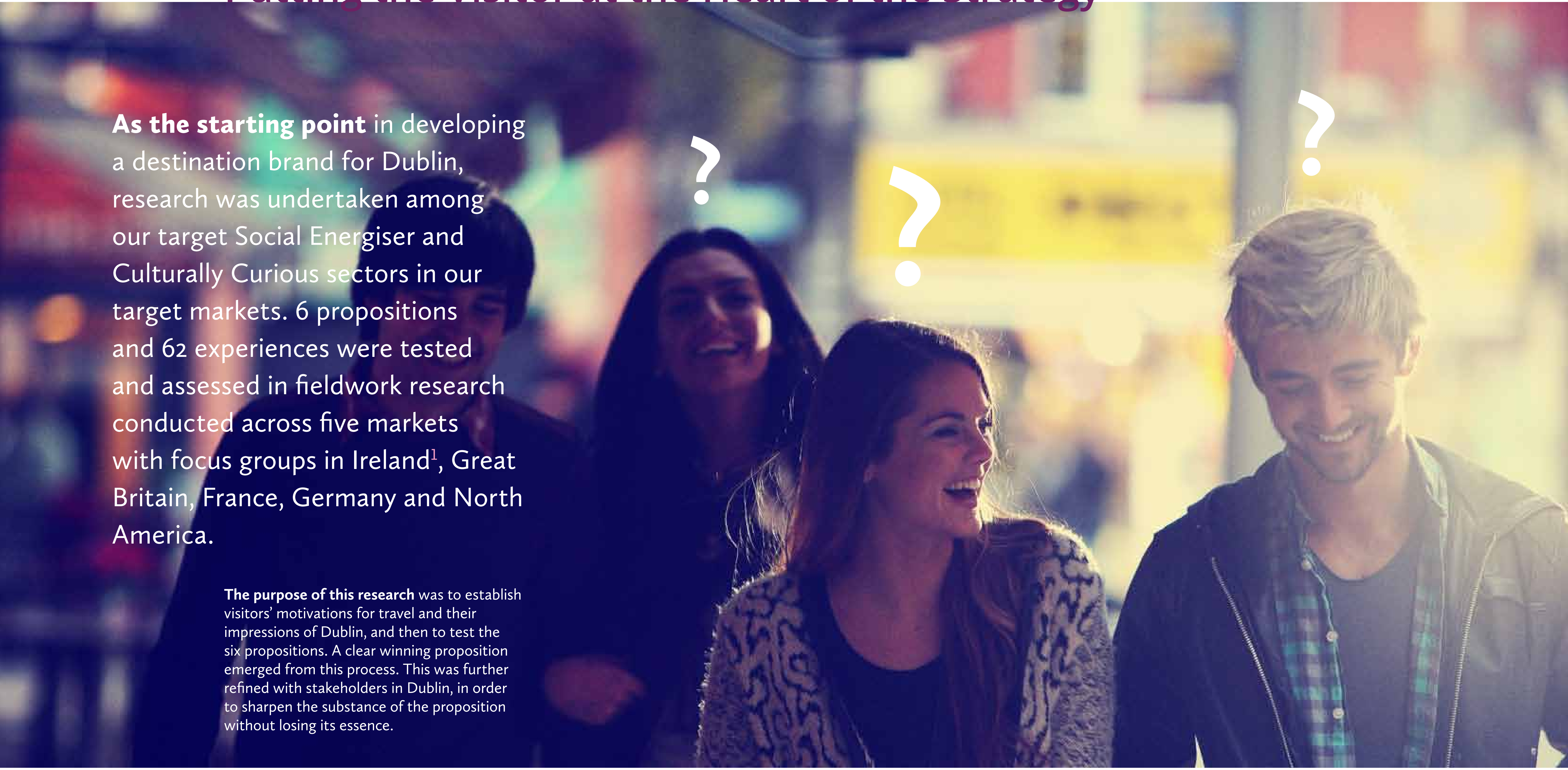
DEVELOPING A NEW DESINATION BRAND FOR DUBLIN

What has been the focus of the Grow Dublin Taskforce?

How valuable is tourism to the Dublin economy?

How has Dublin performed in recent years?

Putting the Visitor at the Heart of the Strategy



As the starting point in developing a destination brand for Dublin, research was undertaken among our target Social Energiser and Culturally Curious sectors in our target markets. 6 propositions and 62 experiences were tested and assessed in fieldwork research conducted across five markets with focus groups in Ireland[1], Great Britain, France, Germany and North America.

The purpose of this research was to establish visitors' motivations for travel and their impressions of Dublin, and then to test the six propositions. A clear winning proposition emerged from this process. This was further refined with stakeholders in Dublin, in order to sharpen the substance of the proposition without losing its essence.

1 The research in Ireland included attitudinal research among recent immigrants to Ireland.

Visitor Motivation: Why People Travel

A range of motivations and needs arose from the focus groups:

1

The search for an individual experience

AUTHENTICITY – There was a strong desire amongst prospective visitors to feel they are experiencing the real city, not one manufactured solely for the tourist. People want to see the city from the perspective of local people.

ADVENTURES – Adventures can be very modest; but the main factor is an openness to the slightly unusual or unexpected, for both younger and middle-aged groups. A willingness to seek new experiences and to be surprised characterises this spirit of adventure.

INDEPENDENCE – In both segments there is a strong desire to retain one's individual integrity; to avoid the tourist trail, to explore and discover things for oneself.

2

Range of Activities

VARIETY – A diverse range of activities is important in a holiday destination – too much of the same thing is boring. Variety provides choice and enables freedom and spontaneity.

ACTIVITY – While definitions of what constitutes activity vary by age, almost all city visitors want to engage in some degree of activity, from 'gentler' activities to greater challenges.

NIGHTLIFE – Some want to relax and others want to be energised, but all expect some sort of evening entertainment. Otherwise the city appears dull and characterless.

3

Pleasure, comfort, and environment

FOOD AND DRINK – Each foreign city is expected to offer a unique taste in terms of local food and drink, which will be an integral part of the holiday experience. But good quality international dishes are also expected and reinforce the contemporary and quality aspects of the destination; in fact, expectation of poor food can be a barrier.

NATURAL ENVIRONMENT – Although there is a tendency to think of cities as essentially urban, access to an interesting or scenic natural environment was identified as being a key differentiating factor in Dublin's favour.

PEOPLE – The attitude and personality of a city's people are of great importance – some cities have the reputation of being hostile, others welcoming. While this is seldom a primary motivator for travel, a less than welcoming city can compromise the visitor's experience, deter repeat visits, and generate negative word-of-mouth publicity, particularly through 24/7 'always-on' social media channels. People make a city; but they can also destroy its reputation.

'PEOPLE WANT TO SEE THE CITY FROM THE PERSPECTIVE OF THE LOCAL PEOPLE'.

Visitor Motivation: Why People Travel

4

Culture

KEY ATTRACTIONS – In every city there are 'must-sees' and 'must-dos'. These frequently contribute to the city's image (e.g. Paris: Eiffel Tower; Rome: Coliseum etc.). A 'fear of missing out' on the 'must-sees' and 'must-dos' may appear counter to the search for authenticity and visitors' resistance to being seen just to do 'what tourists do'. However, a range of 'must-sees' and 'must-dos', plus a variety of other, less iconic attractions, comprise the ideal mix to attract first-time visitors and encourage repeat visits - the 'must-sees' drive initial business; a variety of other attractions maintains interest and inspires consideration of a repeat visit.

HISTORY – Mainly, but not at all exclusively an interest of older age groups, the opportunity to connect with the historical culture and character of a city is important. As well as being predominantly a driver for older segments, this is of paramount importance in the North American market, for which European cities in general are intensely cultural and full of heritage interest.

Authenticity, adventure, independence, activity, nightlife, and a variety of experiences were deemed to be the most important motivations for travel.

Across all markets and segments, there was a strikingly low awareness of what Dublin has to offer and an inability to make a distinction between Dublin and the rest of Ireland. This confirms both the interdependence of Dublin and Ireland as well as the need to develop a powerful distinctive brand to enhance Dublin as a 'must-visit', stand-out destination within Ireland. The more Dublin stands out as an appealing city to visit, the more it adds to the overall appeal of Ireland.

‘AUTHENTICITY, ADVENTURE, INDEPENDENCE, ACTIVITY, NIGHTLIFE AND A VARIETY OF EXPERIENCES WERE DEEMED THE MOST IMPORTANT MOTIVATIONS FOR TRAVEL’.

Dublin's Perception Deficit

There is a gulf between the image of Dublin in the minds of potential visitors and the reality of the city and region. The impression – of a somewhat 'dusty', traditional city, lacking excitement and major attractions – is visibly and energetically contradicted by the actuality of a vibrant, modern European capital with a rich heritage, a thriving cultural scene, world-class food and drink, competitively priced accommodation, and a host of exhilarating experiences, all within a varied natural environment that is exceptional among capital cities.

THIS UNDERLINES both the need and an opportunity to define a differentiating and inspiring international image of Dublin, which is at present a blank slate in many people's minds. Dublin has a great deal of offerings that appeal to people in the target segments. But the challenge lies in communicating this more effectively. This was evidenced strongly by the research undertaken in international markets: when overseas respondents were presented with the range of experiences that Dublin actually does have to offer, they were surprised, became inspired by Dublin and expressed a desire to visit.

Developing the Dublin Brand Proposition

The need to address this perception deficit through a revitalized brand is clear. The new Dublin brand proposition has been developed through a mix of consumer research and stakeholder consultation. Six propositions were developed initially, based on previous work by the Irish Tourism Industry Confederation ('*Capitalizing on Dublin's Potential*') and the Creative Dublin Alliance ('*Activating Dublin*'), and then distilled through extensive stakeholder consultation in Dublin. These were then tested on consumers in Dublin's key geographical markets (GB, France, Germany, and North America).

Feedback from these groups identified a clear winning proposition. This was then brought back for further refinement with stakeholders in Dublin. In refining this, care was taken to retain the essence of the winning proposition while modifying it into a distinct, compelling and differentiating proposition for Dublin, on which Dublin's tourism industry can build:

'DUBLIN IS THE VIBRANT CAPITAL CITY BURSTING WITH A VARIETY OF SURPRISING EXPERIENCES – WHERE CITY LIVING THRIVES SIDE BY SIDE WITH THE NATURAL OUTDOORS'.

Each of the elements of the proposition are clarified in the table below:

ELEMENT	POSITIONING FUNCTION	BARRIERS ADDRESSED
The	Positions Dublin as the only capital city that can deliver on the promise in the proposition.	This aims to overcome the misconception that there is nothing unique about the Dublin City and Region.
Vibrant capital city	Positions Dublin as a contemporary, vibrant, flourishing and constantly changing European capital, with the full range of facilities that a visitor might expect of a capital city.	This aims to overcome the idea that Dublin is 'dusty'.
Bursting with a variety of surprising experiences	Positions Dublin as offering a dynamic and evolving abundance of things to see, do and experience – city living, friendly people, interesting sights, accessible art and music, world-class food and drink – in a compact and easy to navigate space.	This aims to overcome the impression that there is little to see and do in Dublin, and that Dublin does not cater adequately for the Social Energisers and the Culturally Curious.
Where city living thrives side by side with the natural outdoors	Positions Dublin as big enough to be interesting, but small enough to be accessible and navigable, and as immersed in and interwoven with the varied natural environment of the bay, river, canals, mountains and parkland.	This aims to overcome the idea that Dublin is just another mid-sized city, and emphasises its exceptional location, which combines the vibrancy of the city with the tranquillity, scenic appeal and adventure potential of the outdoors.

EACH PART OF THE PROPOSITION HAS A PARTICULAR FUNCTION IN ARTICULATING THE POSITION THAT WE WANT DUBLIN TO OCCUPY IN THE MIND.

Each part of this proposition has a particular function in articulating the position that we want Dublin to occupy in the mind of potential visitors, and in addressing the barriers that might prevent them from making the decision to come. It is important to recognise that this is a proposition aimed at guiding the development of visitor experiences in Dublin and the marketing of Dublin. It is not a statement that should ever be seen as it stands by potential visitors; and it is certainly not a tagline that will ever be seen on marketing materials. Its role is to guide the way in which Dublin's visitor experiences are developed, presented, promoted and interpreted imaginatively to convey the brand values inherent in the proposition.

This proposition, the elements in it and the language with which it is articulated, must permeate all communications within our target markets and inform the visitor experiences that are developed in Dublin. It will need to be adopted by all stakeholders in developing their own marketing collateral, by Dubliners when they are talking about their city and region with friends and colleagues abroad, and by experience-developers when designing their next projects.

To ensure the proposition remains authentic, it is vital to ensure every element of the Dublin experience supports the proposition. In this way, any visitor to Dublin – whether on business or holiday, passing through or staying awhile – is exposed to the breadth of the promises encompassed by the proposition. By bringing the proposition to life in a compelling way we will capture the imagination of potential visitors, persuade them to visit, thrill them with the Dublin City and Region experience, and inspire them to return home as committed Dublin advocates. They will not only talk positively about Dublin to their friends, but the likelihood of their wanting to return to Dublin will be greater, because they will know that the range of activities and experiences in Dublin is ever-changing and inexhaustible.

4

‘DUBLIN PLUS’ – A NEW WAY OF WORKING FOR A GREATER DUBLIN

Why Dublin Plus will be the cornerstone of success

How can Dublin benefit from collaboration amongst stakeholders in the tourism sector?

Delivering the 'Dublin Plus' Promise

The new Dublin proposition offers the promise of surprising and vibrant urban experiences that combine city life with exciting experiences in coastal and mountain areas. The coastal appeals of Howth, Dún Laoghaire, Dalkey and the Dublin Mountains are all within 30 minutes of Dublin city centre and provide a playground for outdoor activities, an attribute that is exceptional to Dublin and appealing to our visitors.

BUT IT IS NOT JUST the immediate environment that is part of the Dublin footprint for the visitor. In terms of accessibility and travelling time, the Dublin visitor footprint extends further afield to encompass other attractions, such as the Wicklow Mountains, Glendalough, and Bru na Boinne. This adds a powerful suite of attractions to Dublin's marketing arsenal. Significantly, it has the potential to change preconceptions of Dublin as a tourism destination and to increase the appeal of Dublin. It also challenges tourism operators in Dublin to think beyond the traditional tourism focus on the city centre and create experiences for the visitor that encompass this wider tourism footprint. Importantly, this extension of what Dublin means to potential visitors is based on consumer research in several markets.

This customer-led geographic redefinition of Dublin is motivating and differentiating. It calls for a new way of thinking and working together to deliver on Dublin's promise.

All stakeholders involved in the Grow Dublin Taskforce are committed to the new Dublin proposition. They have adopted it as the foundation for their individual tourism strategies. They recognise the need both for this radical change and for an alignment across all Dublin tourism stakeholders' activity. This represents a significant change in terms of stakeholder cooperation and, thereby, a significant opportunity for synergy and greater impact.

Together through the Grow Dublin Taskforce, the Dublin tourism industry has subscribed to a focused and unifying commitment that is intended to inspire and motivate the industry into taking the necessary collaborative action:

> **'WE WILL WORK TOGETHER TO UNLOCK DUBLIN'S VIBRANCY AND DIVERSE, SURPRISING EXPERIENCES'.**

Their commitment to this new way of working and the enthusiasm with which the stakeholders adopt and promulgate the new Dublin destination brand proposition will be the most critical elements in the drive to attract more visitors. This will be the catalyst that will re-energise the industry and enable both participants in the tourist industry and Dublin citizens to see the Dublin City and Region in a new light, to talk about it in a new way, and to create new business opportunities.

This will provide the motivation and the focus for developing new visitor experiences, for revitalizing existing ones by incorporating the new brand proposition, and for reinventing Dublin as a destination that is a vibrant, exciting place to visit.

‘DUBLIN CITY COUNCIL VERY MUCH WELCOMES THIS NEW STRATEGY ON TOURISM IN DUBLIN AND WE LOOK FORWARD TO PROACTIVELY WORKING WITH THE OTHER STAKEHOLDERS ON ITS IMPLEMENTATION OVER THE COMING YEARS’.

BRENDAN KENNY – Assistant Dublin City Manager, Dublin City Council

The 'Dublin Plus' Promise

With the new proposition and the energy that the industry puts behind it to deliver the strategy, Dublin will be repositioned as one of Europe's top destinations for visitors in the Social Energiser and Culturally Curious segments as well as for conference and incentive visitors.

Working together will enable us to:

- **Reinvent** Dublin by imagining its stories through the eyes of the visitor, finding new ways of revealing Dublin's unique character and what it has to offer now and into the future. Together stakeholders can develop offerings that will directly address the motivations of visitors and provide unexpected possibilities for visitors to relish the vibe of the city and the natural outdoors across the wider Dublin region;
- **Reinvigorate** and empower Dubliners, whose familiarity with their own city may have prevented them from noticing or appreciating some of the latest developments, and help them to discover or rediscover its pleasures and hidden experiences, so that they become enthusiastic advocates for the city. This will endow their encounters with our prospective visitors with the potential to generate passionate conversations that are genuine and inspiring;
- **Rejuvenate** Dublin through a continuous process of physical and experience-led regeneration, so that Dublin is perpetually evolving, energetic and fresh, and always has something new, exciting and different to offer the visitor.

The 'Dublin Plus' Promise

The new Dublin proposition promises vibrancy throughout a much wider area than has traditionally been perceived as being in city visitors' sights before. This places an onus on stakeholders throughout this wider region to deliver on this promise of vibrancy.

In this, it represents a visitor-centric view of Dublin – a view that appeals to the motivations of those market segments with the greatest potential for growth. But it must also be one with which Dubliners themselves are comfortable. What unites these two groups – visitors and residents – is that the new proposition represents the reality of Dublin, and it is a motivational definition of Dublin's reality for both visitors and residents: Dublin really is **the vibrant capital city bursting with a variety of surprising experiences – where city living thrives side by side with the natural outdoors.**

A significant part of the new proposition's appeal is that it extends the visitor footprint of Dublin well beyond the city centre to suburban areas that are accessible for visitors, but which Dubliners might not consider part of their own city experience. In doing so, it overcomes the perceived barriers of Dublin being 'dusty' or having a shortage of things to do; but it should also challenge tourism operators to think how to deliver the expectations inherent in the 'Dublin Plus' promise.

While the reality of Dublin is far from this 'dusty and dull' perception or ill-defined image expressed by several respondents in our international research, the major challenge clearly lies, firstly, in communications. This requires the range of experiences that Dublin has to offer to be communicated to those who would find this appealing – hence the selection of the target segments described above. The second challenge lies in ensuring that these experiences constantly remain fresh and appealing to our target segments.

Dublin needs to deliver on this promise to the visitor at every visitor touch-point, so that visitors experience what has been promised and are enthused by their experience. This calls for joined-up thinking and planning between all stakeholders responsible for promoting Dublin and developing tourism products, as well those responsible for transport, accommodation, events, attractions, public spaces, and all elements of the visitor experience. It calls for a level of collaboration, cooperation and information sharing that exceeds anything that has occurred to date.

'A SIGNIFICANT PART OF THE NEW PROPOSITION'S APPEAL IS THAT IT EXTENDS THE VISITOR FOOTPRINT OF DUBLIN WELL BEYOND THE CITY CENTRE TO SUBURBAN AREAS THAT ARE ACCESSIBLE FOR VISITORS'.

Early Results

Delivering on the promise of the new Dublin proposition will depend not only on its effective communication and a vibrant Dublin experience, it will also be important to inspire confidence amongst stakeholders in the new proposition and for them to see evidence of progress as soon as possible.

This will require some early successes, based on an action plan geared to deliver against these promises. Proposals to achieve this are outlined in chapter 7 *Immediate Actions*, which flow from the *Action Plan* in chapter 5.

Skills Development

Successful implementation of this new strategy will require an assessment by stakeholders of the skills required to deliver it and their development where necessary. This will range from technical skills, such as multilingual skills, digital expertise, and chef skills to softer skills such as customer service, management and leadership. Skills development needs will be identified by the appropriate groups/people in the implementation phase.

5

ACTION PLAN

What are the actions that will deliver this new tourism strategy?

How will Dublin attract visitors from its target segments in key markets?

How will Dublin ensure the visitor experience is as positive as possible?

Action Plan

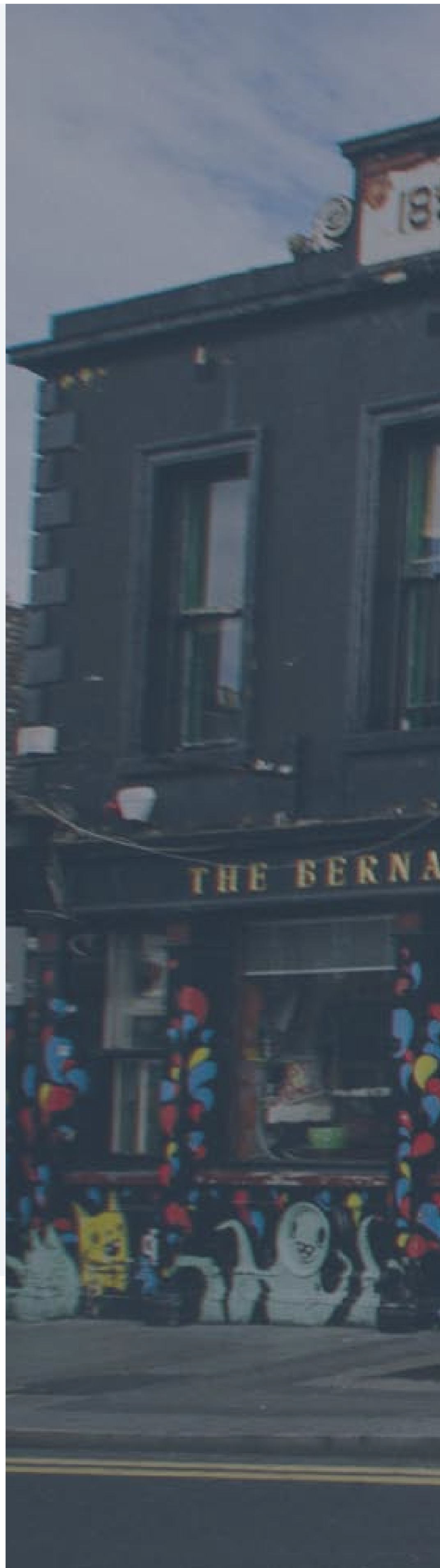
This chapter sets out the actions, in terms of key programmes and projects, which will deliver this tourism strategy. They are split into three main categories: specific programmes for each sector, cross-sector enabling projects, and hygiene-critical projects.

THE THRUST OF THIS STRATEGY is to maximise tourism numbers and value, in order to grow the economy of Dublin City and Region and thereby improve the quality of residents' lives. The Grow Dublin Taskforce and its sub-working groups, made up of a cross section of tourism sector representatives, have developed plans that represent a roadmap to achieve this between now and 2020.

As with the strategy, this action plan represents the culmination of extensive consultation with stakeholders in Dublin City and Region, taking into account evidence obtained from both existing market intelligence and insights obtained from new primary research in international markets. This has ensured these recommendations for action are not only robust, in terms of their focus on delivering against the strategy's marketing and development priorities; but they also represent a genuine partnership plan, which has been created with extensive input from the Dublin tourism industry and other stakeholders throughout Dublin City and Region.

This action plan is split into specific programmes for each sector, cross-sector enabling projects, and hygiene-critical projects. All of these address barriers identified during the consultation process, which threaten to prevent Dublin City and Region from achieving the strategy's objectives and maximising its tourism potential. They also identify key actions for overcoming these barriers and implementing this strategy, in terms of high-level programmes and projects that flow from each of these programmes.

'THIS ACTION PLAN REPRESENTS THE CULMINATION OF EXTENSIVE CONSULTATION WITH STAKEHOLDERS IN DUBLIN CITY AND REGION'.

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The 'Dublin Plus' Promise

The three types of programmes and projects are defined as follows:

Sector-specific programmes

These are high-level programmes that address the development of Dublin's five key sectors: Social Energisers, Culturally Curious, 'promotable' business tourism, events, and cruise tourism. Within each sector-specific programme, there are several projects aimed at delivering the objectives for that sector. Delivering the projects within these sector-specific programmes will be fundamental to achieving the growth targets identified. While these sector-specific programmes are core to delivering a step change for Dublin, this growth will be compromised if the activities identified within cross-sector-enabling projects and hygiene-critical projects are not also simultaneously addressed as a priority.

Cross-sector enabling projects

Cross-sector enabling projects refer to projects that transcend two or more of Dublin's five key sectors – projects that are not specifically limited to just one sector (e.g. projects such as the development of a brand identity for Dublin, a powerful marketing communications strategy, a digital network for Dublin City and Region, improved access to public transport, and turning Dubliners into Dublin brand advocates etc., all transcend several of the four key sectors).

It is important to recognise that there is no hierarchical priority between sector-specific and cross-sector enabling projects. They have been so defined for ease of comprehension. They are equally critical to the success of this strategy.

Hygiene-critical projects

Hygiene-critical projects refer to projects that may not in themselves drive more tourism into Dublin City and Region, but which may significantly diminish the visitor experience if not addressed and send the visitor home as less of an advocate of the Dublin experience than is both desirable and possible (e.g. personal safety and security concerns, dirty streets, visitor-unfriendly opening hours, lack of joined up planning that fails to address issues critical to the visitor experience).

The slide below illustrates the relationship between sector-specific programmes, cross-sector enabling projects, and hygiene-critical projects:

Steps to strategic implementation

SECTOR PROGRAMMES				
'Dublin Now' Plus for Social Energisers & 'Dublin Now' approach to Culturally Curious	Experience Development Framework (Culturally Curious + Social Energisers)	Reposition Dublin as an International Business Tourism destination	Dublin Events Forum	Position Dublin as a 'Must See' Destination in a European Cruise itinerary
CROSS-SECTOR MACRO / ENABLING PROJECTS				
Delivering a powerful marketing communication strategy	Ensure that the Economic Benefit of tourism is ***personally*** felt so that Dubliners become advocates of Brand Dublin	Create a Digital Network for Dublin including Pull-Push Strategy	Improve ease of transport and access around Dublin	Improve accommodation capacity (grading)
HYGIENE CRITICAL PROJECTS				
Rubbish presentation & collection to align around visitor journeys	Opening hours of public attractions to match visitor needs e.g. Mondays	Natural outdoor infrastructure and facilities e.g. shower at the 40 foot	Tourism not fully incorporated in city planning	A visitor survey to confirm importance of hygiene factors

Details of sector-specific programmes, cross-sector enabling projects, and hygiene-critical projects are as follows:

Sector-Specific Programmes

1

PROGRAMME
'Dublin Now Plus' for the Culturally Curious and Social Energisers

The Grow Dublin Taskforce absorbed and built on the insights and segmentation analysis undertaken in 2012 in the Tourism Ireland *GB Path to Growth*. Research conducted for Fáilte Ireland in October-November 2012 estimated Social Energisers as representing 34% of British visitors to Dublin. 'Dublin Now' focused on Social Energisers in Great Britain as a primary segment and piloted a project to reposition Dublin.The plan is centred on three important work streams, developed to overcome the barriers to growth:

- **Industry Engagement & Collaboration:** Maximising the participation of Dublin City and Region stakeholders in the development of Dublin visitor experiences, their digital footprint and the marketing of Dublin.
- **Digital Content and Strategy Implementation:** Generating and continually maintaining the relevance of dynamic, informative digital content, and enabling multiple stakeholder conversations about their Dublin experience, in order to ensure that there is both sufficient Dublin-driven and user-generated content available to potential visitors.
- **Targeted activation in the marketplace:** Innovative and impactful marketing campaigns targeting Social Energisers through appropriate channels with relevant motivational messages to inspire them to visit.

An interim review highlighted the success of the 'Dublin Now' pilot approach. This will be built upon to target the Culturally Curious segment as well as the Social Energisers and eventually be expanded into other overseas markets. This will be known as '*Dublin Now Plus*'.

2

PROGRAMME
Bringing Dublin to Life

The breadth and depth of Dublin's offering are beyond question. Dublin has a rich diversity of experiences to offer the visitor. This diversity will be brought to life through a coherent and accessible experience development framework by developing key themes across Dublin city and region (urban and extra-urban). This will guide both the development of segment-focused experience developments and Dublin's marketing communications. Core values of the new Dublin brand proposition will underpin the project to convey a sense of variety, vibrancy and surprise. The framework will also provide Dubliners with new ways to engage with their city/region and enable them to mediate and interpret it more effectively to visitors.

The framework will stretch across all parts of Dublin City and Region (urban and extra-urban). It will cover the range of 'things to see' and 'things to do' and it will also be woven in or layered with food experiences, entertainment, music and artistic/cultural events. These themes will be identified on the basis of visitor appeal, Dublin's ability to deliver in each theme area, and its credibility in the eyes of each segment.

At an enabling level, this will explore ways in which Dubliners can engage more with their city/region and mediate it more effectively to tourists.

The 'Dublin Plus' Promise

At its most basic, the framework for 'Bringing Dublin to Life' is simply a list of the components that make up a great Irish tourism experience brought together in imaginative ways according to the market segment being targeted. Having a themed framework allows us to bring consistency to the way in which we develop plans to match the needs of our target visitors with what is currently available, and to give experience-providers the insights to refine and improve their offerings. It also enables us to communicate a revitalized Dublin in an accessible and appealing way to prospective visitors.

This will provide a holistic 'diagnosis' of visitor experience-development needs, informed by available market intelligence and work done to date in the relevant geographical or thematic area. All relevant work executed to date by public and/or private entities in Dublin will be incorporated into the Experience Development plan for Dublin. Continual experience development is most critical for the Social Energiser segment – in terms of identifying fresh, new experiences and encouraging trade responsiveness in developing experiences that target Social Energisers, thereby enabling them to make the most of their time in Dublin. This framework of experiences will also give Dubliners a new way of seeing their city and imagining its potential.

3

PROGRAMME
Reposition Dublin as an international business tourism destination

THERE ARE 3 KEYS STRANDS TO THIS PROGRAMME: Make Dublin the vibrant capital destination for business visitors: This aims to ensure that every business visitor to Dublin has a streamlined, professional experience and that there is consistency across the board at every touch-point. Refining these basic requirements of the business visitor in the first instance will underpin the Association and Corporate and Incentive programme ideas.

This is about modernising Dublin's image in potential business visitors' eyes through the new proposition, conveying a coherent and consistent message about Dublin at all Business to Business touch-points – from sales pitches through to site inspections, and making the city easy to access in terms of information and navigation. It is also about engaging city and regional stakeholders so that they are aware of business events coming to Dublin and can make the most of the opportunity, as well as provide a real Dublin welcome to visitors.

This latter item will also rely on innovative communications to Dubliners about the value of tourism to the city and region, building on existing communications by Fáilte Ireland and Tourism Ireland about the contribution tourism makes to Dublin and Ireland.

REPOSITION DUBLIN AS AN INTERNATIONAL CONFERENCE DESTINATION: The number of meetings held by international associations, and the business travel they generate, are both on the rise. The International Congress and Convention Association estimates that the number of conventions worldwide increased by more than a thousand to 11,150 meetings in 2012.

Business Tourism to Ireland grew by 10% from 943,000 in 2011 to 1 million in 2012, of which an estimated 70% (c. 700,000) comes to Dublin.

While Dublin already performs reasonably well in attracting conferences, it is far from fulfilling its potential. The new Dublin branding proposition represents an opportunity to fortify Dublin's appeal as a conference destination and move it up the agenda for conference organisers. This will build on existing success in the conference area, focusing on three sectors offering the greatest potential: medical science, education, and technology.

Projects within this programme, which aim to build visitor numbers significantly, include:

1. Leveraging Dublin's innovation and technology success;
2. Clustering appropriate leisure events around conferences.

Create a corporate agents' reward club and incentive experts' training programme:

The idea is to:

- Ensure that corporate agents are incentivised for bringing business events to Dublin;
- Enable agents – both home based and overseas – to become 'experts' in a selection of incentive programmes by taking part in a series of training platforms.

The ‘Dublin Plus’ Promise

4

PROGRAMME
Position Dublin as a ‘must see’ destination on a European cruise holiday

Over the past decade, the number of cruise passengers into Dublin has tripled, with an average annual growth rate of 12.8%. The number of cruise passengers arriving in Dublin exceeded 100,000 for the first time in 2013. It is estimated that the average cruise visitor spends approximately € 40-100 in the local economy per day.

A recent study by Bermello, Ajamil & Partners for Dublin Port estimates that this traffic can continue to grow at a rate exceeding 8% a year, reaching 200,000 passengers by 2020 and 400,000 by 2032. Considerable work has already been carried out to attract additional cruise business and to prepare the port facilities that will be needed to accommodate it.

‘Cruise Dublin’ Forum

A Cruise Dublin forum will be formally established to pursue growth targets and to promote Dublin as a cruise destination to cruise operators, cruise agents and those contemplating a European cruise.

The emphasis will be on targeting cruise planners in cruise companies, who are responsible for cruise itinerary planning and deciding which destinations and ports will be included in next year’s cruise programme.

The new Dublin proposition will underpin the overall appeal of Dublin as a potential destination, which will contribute to demand by cruise passengers for Dublin and, ideally, lead to an eventual growth in the number of ships calling at Dublin and Dun Laoghaire.

Longer-term efforts will be made to persuade cruise planners to consider using Dublin as a turn-around port and inter-porting hub, in order to establish a more significant and longer-term role for Dublin City and Region within the European cruise scene.

5

PROGRAMME
Dublin Events Forum

An Events Dublin Forum will be established to bring the various stakeholders together and to facilitate collaboration for the mutual benefit of all involved in organising and bidding for events.

An events strategy will be developed to identify a target list of mobile international events to attract to Dublin. The events strategy will also establish a mechanism for generating high profile local events with international appeal.

The local authorities in Dublin City and Region will work together to develop a set of templates to help event organisers to understand and negotiate the various regulatory requirements required in mounting major events. This will also include advice and good practice on running successful events, over and above the regulatory requirements.

‘THE TASK OF THE MARKETING COMMUNICATIONS STRATEGY WILL BE TO CREATE A CLEAR IMAGE OF DUBLIN IN THE MINDS OF POTENTIAL VISITORS’.

'DUBLIN IS A FANTASTIC CITY WITH LOTS TO OFFER ANY VISITOR, BUT WE NEED WORK TOGETHER TO GET THE RIGHT MESSAGES TO THE RIGHT PEOPLE. IF DUBLIN IS TO GROW ITS SUCCESS WILL VERY MUCH DEPEND ON ACHIEVING THIS, AND THE WORK OF THE GROW DUBLIN TASKFORCE ALONG WITH THE ROADMAP NOW PROVIDED BY THE 'COLLABORATIVE STRATEGY FOR GROWTH TO 2020' PLOTS A CLEARLY DEFINED ROUTE THAT WILL HELP US STAY ON COURSE TO ACHIEVE FURTHER VISITOR GROWTH AND GREATER ECONOMIC SUCCESS FOR THE CITY AND COUNTY OVER THE COMING YEARS.'

OISIN QUINN – Lord Mayor of Dublin

Cross-Sector Enabling Projects

1

PROJECT
Dublin's Unique Brand Identity

Brand Dublin Visual Identity

The first step in developing a new brand for Dublin has been the identification of key values for Dublin, which are inherent in the new proposition: diverse/varied, vibrant, surprising, natural outdoors. These need to be reflected in terms of visual imagery and tone in all marketing communications and experience developments.

To underpin this new Dublin proposition, a strong and coherent visual identity is required. A visual identity for Brand Dublin will be an important tool within the brand strategy to assist in generating awareness of Dublin and inspiring recognition of what the new proposition stands for.

This will assist in identifying businesses that participate in the brand activity in Dublin, entail merchandising possibilities for Dublin businesses, and effectively identify Dublin across all communications – both domestic and international. The identity should resonate for both the people of Dublin – as a source of pride and shared vision – and for visitors – to help them recognise Dublin through this distinct visual marque in marketing communications.

Visual Equity

One key point regarding the identity is that it will be important to build visual equity in the marque – locally, nationally and internationally. This will require active support at each of these levels to ensure effective exposure for the brand identity and building an association in the minds of the various audiences of Dublin as a distinct destination.

In all cases the communications for Brand Dublin should be informed by the positioning and brand strategy – impacting on messaging, visual content, and tonality. However specific consideration should also be given to role of visual identity and lead brand within brand communications.

Brand Identity Application

Ideally, and subject to brand licensing issues being resolved, the more organisations and businesses that use the brand identity in their own marketing communications and collateral, the greater the recognition for Dublin. Over time this will build equity in the Dublin brand, which will contribute to raising awareness of the positive elements of Dublin, as defined by the new proposition. Public sector tourism-related organisations should incorporate the Dublin brand in their own marketing communications wherever possible and appropriate.

The major proponents of this are likely to be:

- **Local Authorities** – Dublin City Council, Fingal County Council, South Dublin County Council, and Dún Laoghaire-Rathdown County Council and other local stakeholders should incorporate the Brand Dublin identity into their communications. At a basic level this should be in the form of an endorsement on hyper-local communications, and use of the brand identity in a more dominant way across collaborative Grow Dublin Alliance activity.
- **National** – Fáilte Ireland should consider use of the Brand Dublin visual identity within their marketing campaigns to build equity. It will be important to position Dublin differently in the minds of domestic tourists outside of Grow Dublin Alliance.
- **International** – Tourism Ireland should consider use of the Brand Dublin visual identity in the creation of Dublin specific communications and sections of communications. Using Dublin as a primary destination within marketing communications should be explored as it offers an opportunity to communicate the distinct Dublin proposition and build visual recognition overseas.

‘DUBLIN IS OF COURSE A SUCCESSFUL DESTINATION BRAND ALREADY. WHAT THIS REPORT DOES IS OUTLINE THE TOOLS, STRUCTURES, SKILLS AND BEHAVIOURS NEEDED TO ENSURE DUBLIN WILL MEET THE GROWING AND SOPHISTICATED INTERNATIONAL COMPETITION FOR VISITORS HEAD ON AND NOT ONLY SURVIVE BUT THRIVE’.

JIM DUNNE – Creative Dublin Alliance

Cross-Sector Enabling Projects

Establishing Dublin as a distinct brand in the minds of consumers (and redefining its meaning with citizens) will require a stretch from all of the stakeholders. However, this is what stakeholders have signed up to through the consultation process.

'CREATE A CLEAR IMAGE OF DUBLIN IN THE MINDS OF POTENTIAL VISITORS'.

2

PROJECT
Delivering a Powerful Marketing Communications Strategy

Throughout the implementation of the strategy, the new proposition must be supported by a vigorous, segment-focused, creative, targeted communications strategy for the relevant geographical markets and, internally, for Dubliners.

The main finding from the field research carried out in developing this strategy was that awareness of what Dublin offers – and particularly the range of stimulating experiences in Dublin City and Region – was low among potential visitors. Prospective visitors in our target markets often have a limited, or sometimes distorted, view of what the city and region have to offer. The task of the marketing communications strategy will be to create a clear image of Dublin in the minds of potential visitors, and to communicate Dublin as a 'must-see' destination, a vibrant, happening capital, with easy access to the natural outdoors. This will not only unite stakeholders behind a focused set of messages targeting Dublin's five key sectors, but it will also enable synergies to be achieved in terms of more focused targeting on these key sectors and the potential sharing of resources to do so.

3

PROJECT
A Comprehensive Digital Plan

The digital plan will provide a platform, which will be used both by the supply side – the tourism service providers, event organisers, retailers and experience developers in Dublin City and Region – and by the demand side – those who are contemplating a visit to Dublin and visitors who are already here. This will be content-rich, interactive and facilitate social communications through a range of appropriate links to services, businesses and other channels of interest to visitors.

This will be the prime source of information on Dublin for visitors and, ideally, residents alike. This will build on the existing, successful visitdublin.com, and explore innovative ways of servicing future visitor information and communications needs.

The platform will include a database of events, facilities, services and products, comprising a 'back-end' to enable providers to upload and edit details of their offerings, and a 'front end' for visitors and potential visitors to view and interrogate in making their travel decisions and planning their trip. It will also contain an interactive map, which will enable visitors to search according to their interest and by theme.

As the most comprehensive and up-to-date source of information and most valuable channel to other sources, this platform will enable the cross-promotion of experiences and events by hotels, transport operators and other frontline staff who deal with visitors face-to-face on a daily basis. They will have access to a regular calendar of events, structured by time of day and by relevance to different market segments (Social Energisers and Culturally Curious).

The consumer interface will be populated and continually updated with content that is relevant to each segment. Real-time updates to the calendar will be broadcast via Twitter feeds, and come from recognisable personalities representative of the target segments.

The existing sites visitdublin.com & ireland.com provide many of these features. In pursuing the strategy, the most appropriate channel will be chosen for implementation. In the interim visitdublin.com, already a successful Dublin-centric site, will be further developed to meet the digital needs of the two target segments. It will be important to provide segment-relevant information, such as a regularly updated experience matrix showing what's on by time of day and structured to appeal to each segment

On a more visionary level, those responsible for developing this digital plan for the future will seek to engage with some of the leading edge technology companies in the city and participate in 'blue sky' thinking about possible future scenarios that technological developments might enable, with a view both to providing the best possible service for visitors and to positioning Dublin as a forward-thinking, vibrant city.

We should also ensure that we leverage the extensive digital expertise that is based in Dublin to develop a leading edge digital plan. This should not only 'future-proof' the digital plan as far as possible, but it should also enable Dublin to develop and maintain a leadership position in the world of social and digital communications relevant to tourism.

'RECRUITING DUBLINERS AS ADVOCATES OF THEIR OWN CITY WILL REQUIRE THEM TO UNDERSTAND THE IMPACT THAT TOURISM MAKES ON THEIR OWN LIVES'.

Cross-Sector Enabling Projects

4

PROJECT
Recruiting Dubliners as Advocates of Dublin as a Tourist Destination

Dubliners can act as advocates for their own city. They will communicate positive messages only insofar as their own experience has been positive; and they will make the effort to do so only if they truly understand the benefit of doing so.

The first step is to encourage Dubliners to get to know their city and region better – to see the attractions that visitors see, to have the experiences that visitors have. Critically, they also need to understand and buy into the Dublin brand – they need to become enthusiastic advocates of their own city and region. Various mechanisms are proposed, such as a 'Dublin Open Day', during which a wide range of events, products and experiences is available at little or no cost to local residents; a day when people are encouraged to visit parts of Dublin unfamiliar to them; repeats of the Culture Night or Open Doors events at more regular intervals. In short, more ways need to be found to encourage Dubliners to broaden their mental map of the city and to encourage them to think positively and knowledgably about their own city and region.

The second step is to encourage Dubliners to speak positively about the city and region to visitors and to their friends, colleagues and family abroad. Once reminded of the rich breadth of experiences available, they will be more confident and likely to be willing to engage with visitors in a way that enhances their experience; and they will also be more inclined to do this if they understand the benefits of tourism to them – both the direct economic benefit and the spin-off cultural and social benefits. The engagement plan arising from this strategy, therefore, must have the citizens of Dublin as one of its prime targets.

Taxi drivers will be an early priority audience in this engagement strategy, as they have the opportunity to create important first impressions. Initial steps by means of a networking and information session as part of Fáilte Ireland's *Dublin Now* project have proven successful. By circulating them with regular updates about what's happening, important conferences in town and so on, they can talk to their customers from a position of knowledge and understanding and communicate the new Dublin brand in a positive way. The merits of setting up an award scheme for taxi drivers who excel in the role of ambassador for the city are also worth exploring.

Opportunities will also be provided for citizens to feed into other elements envisaged in the strategy, such as the events calendar, the development of authentic experiences, and their own stories across the Dublin City and Region.

Recruiting Dubliners as advocates of their own city will require them to understand the impact that tourism makes on their own lives – in terms of economic benefits, employment, and social life. Encouraging Dubliners to see themselves as part of the bigger economic picture will be important. This needs to be constantly communicated in an innovative way, building on existing communications by Fáilte Ireland and Tourism Ireland about the contribution tourism makes to Dublin and Ireland.

5

PROJECT
Improve Ease of Transport and Access

While Dublin is a relatively compact city, it can still be a challenge for visitors to find their way around. In particular, the connections to outdoor experiences and other attractions in the wider Dublin City and Region can be hard to find, with the result both that the visitor experience is less than it could be and opportunities to maximise tourism revenue from discretionary expenditure in areas beyond the immediate city centre are not realised. Better information and signage are priorities to achieve this. Signage is currently being worked on by Dublin City Council and Fáilte Ireland. Improved signage, for example, would help to underline the proximity of the natural outdoors to the city centre. The further away from the city centre, the more important this becomes. This is fundamental to delivering the 'Dublin Plus' promise, whereby the wider region and outlying rural areas can obtain benefits from tourism to Dublin.

An agreed signage framework is already in place between the National Transport Authority and Fáilte Ireland, and this is welcome. Public transport information should assume no local knowledge when it is compiled. This will ensure the information and timetabling is comprehensible and accessible to both residents and visitors. This will help visitors understand the public transport system and encourage them to travel more widely in Dublin City and Region. Opportunities need to be explored, particularly with the National Transport Authority, to identify how visitor information needs might be serviced in the next generation of transport apps, such as the Hit the Road app and NTA's Journey Planner app, which are understandably, currently focused on residents who are familiar with the public transport system.

6

PROJECT
Improve Accommodation Capacity

A better matching of the supply and demand for accommodation is required, particularly in peak periods. However, a significant increase in visitor numbers will create the need for more hotel beds, particularly in the city centre, as well as a need for better transport links between accommodation in the outskirts and the city centre.

A first step is to provide visitor-oriented information on public transport links to areas outside the city centre where visitor accommodation is available. But that will only provide a temporary solution. An assessment of the anticipated increase in demand will need to be undertaken in light of the growth scenario that is adopted and targeted. Anything other than maintenance of the status quo scenario is likely to increase demand for accommodation capacity by between 10-30%.

Hygiene-Critical Projects

The need for these projects, described as 'hygiene-critical' areas to be addressed, arose from in-depth interviews with Grow Dublin Taskforce stakeholders and engagement with the trade. These issues were raised as potential barriers to visitors' experiencing Dublin in its best light. While not critical as motivating factors, if these were left unaddressed they could damage Dublin's image and deter future visits, thereby frustrating the objective of achieving significant tourism growth.

Presentation and Collection of Waste

It was identified that waste is at times left on the streets during peak footfall hours causing unsightliness. This risks giving visitors a negative impression of the city, and particularly the city centre. The Dublin City Business Improvement District (BID) is currently establishing a group waste scheme that encourages businesses to present waste at specified times and provides for it to be collected punctually. Separate collection times are proposed for food waste collection that would coincide with the needs of the hospitality trade.

'THE IDEA AT THE HEART OF THE STRATEGY PRESENTED IN THIS REPORT IS A DECEPTIVELY SIMPLE BUT REALLY POWERFUL ONE. BY RECOGNISING THE PARTICULAR COMBINATION OF CITY LIVING AND NATURAL OUTDOOR EXPERIENCES THAT DUBLIN HAS TO OFFER THIS STRATEGY HAS IDENTIFIED THE UNIQUE APPEAL THAT MAKES DUBLIN ATTRACTIVE TO VISITORS. IT IS AN IDEA THAT RESONATES AS AUTHENTIC TO THOSE OF US WHO LIVE AND WORK IN THE CITY AND COUNTY. IT IS ALSO AN IDEA THAT CAN INFORM THE SURPRISING EXPERIENCES WE'LL NEED TO DEVELOP, PROMOTE AND FACILITATE TO MAKE THIS CITY AN EVEN BETTER PLACE TO VISIT, AND TO LIVE IN'.

CIARAN O'GAORA – Zero-G

Cross-Sector Enabling Projects

Natural Outdoor Infrastructure and Facilities

To maximise the impact of Dublin's valuable position between the sea and mountains, including the city's 'green' sites such as parks, rivers and canals, there are opportunities to make the visitor experience more enjoyable and more accessible. Building on facilities and projects that are currently in place, the Grow Dublin Tourism Alliance will ask each local authority to look at the outdoor attractions in their area and audit their infrastructure to identify those elements that comply with and reflect the new proposition.

This could include diverse, vibrant or surprising aspects such as events, buildings and public art; or it could identify facilities that make the visitor experience more accessible or manageable, such as showers or public conveniences or wheelchair access. Identifying those that do not currently, but could, be upgraded or developed to cater for visitors will be an important outcome of this audit.

It is recognised that the primary users of most such services are local residents and that tailoring them for the visitor may not always be financially warranted. Nevertheless, taking visitor needs into account at the outset at planning, design and building stages is likely to ensure any new amenity will also be of benefit to local people and thereby avoid additional spend at a later stage.

Introducing a visitor orientation into local authorities' planning and development mindset in this way will be useful.

Opening Hours of Public Attractions

In order that Dublin merits the reputation of a city that is 'vibrant' and bursting with surprising experiences, it is important that operators and developers work together to ensure that gaps in the calendar for each target segment are limited. For example, one improvement to the visitor experience would be for art galleries and museums to consider closing on different days, and to have late opening/late closing at least one day a week, possibly staggered, in order to reduce potential visitor disappointment and avoid undermining the drive to portray Dublin as a 'happening' city full of diverse experiences.

Personal Security and Safety

Although Dublin is - by international standards – a remarkably safe city, in which very few visitors experience any problems, there is a perception that this is not so in certain areas. This was identified in the 'Better City for All' report by the Strategic Response Group. This report outlines a partnership approach to address public substance abuse and perceived anti-social behaviour in Dublin City Centre and gives 60 recommendations that would need to be fully implemented to overcome the real and visible challenge that Dublin is facing. It is recognised that solutions to social and economic/tourism issues may not always coincide. However the potential damage to the visitor economy needs to be kept in mind in seeking a solution to this issue.

Tourism incorporated in city planning

All Dublin and City Region municipalities include tourism in their Local Plans. However, it is important to ensure that tourism is incorporated further downstream in planning and development decisions. This means ensuring the planning process assesses tourism implications in decision-making at all levels. This will ensure not just that tourism angles are considered when making decisions about infrastructural development, but it will also enable opportunities to be identified, for incorporating elements into projects for the visitors' benefit, which might otherwise have been overlooked.

‘BUILDING ON FACILITIES AND PROJECTS THAT ARE CURRENTLY IN PLACE, THE GROW DUBLIN TOURISM ALLIANCE WILL ASK EACH LOCAL AUTHORITY TO LOOK AT THE OUTDOOR ATTRACTIONS IN THEIR AREA AND AUDIT THEIR INFRASTRUCTURE TO IDENTIFY THOSE ELEMENTS THAT COMPLY WITH AND REFLECT THE NEW PROPOSITION’.

6

COLLABORATING FOR SUCCESS

What can Dublin learn from international best practice in other cities?

How can Dublin apply appropriate elements of best practice elsewhere in implementing this new strategy?

Competitor Analysis

The Grow Dublin Taskforce has examined the organisational and funding models employed by thirteen international competitor Destination Marketing Organisations (DMOs), with the aim of establishing best practice for organisational structure, business model, and stakeholder collaboration, so that the Dublin tourism strategy to 2020 can be delivered effectively.

WHILE DUBLIN HAS SUFFERED A DECREASE in visitor numbers over the past decade, other cities within Dublin's peer group enjoyed strong growth in the same period, despite a challenging global economic environment.

To understand the drivers behind this growth – and thereby identify key desirable features for a new Dublin implementation model – the Taskforce reviewed documentation and conducted one-to-one qualitative and quantitative interviews with CEOs and senior executives from DMOs in the following cities:

- **Amsterdam**
- **Barcelona**
- **Berlin**
- **Brussels**
- **Copenhagen**
- **Glasgow**
- **Hong Kong**
- **Lisbon**
- **Liverpool**
- **Prague**
- **Vancouver**
- **Vienna**
- **Washington**

In order to measure the performance of each city and compare them with one another and with European trends and averages,[21] the following business performance factors were analysed for each city and its DMO:

- Structure and business model
- Stakeholder engagement
- City performance
- Critical success factors

Of all the cities surveyed, Copenhagen and Amsterdam were identified as having models most suited to delivering Dublin's new strategy. This conclusion was based on a mixed-criteria analysis which took into consideration Dublin's needs, defined as follows:

- A high level of stakeholder engagement city-wide, with a defined engagement structure;
- Positive, cooperative relationships between stakeholders, and particularly between public authorities and tourism businesses, based on mutual respect and understanding of each other's objectives;
- A structure that enables high performance in the sectors we have identified as crucial (leisure, business tourism, cruise and events tourism);

21 Provided by European Cities Marketing reports

'THE WORLD IS GOING TO CHANGE FUNDAMENTALLY OVER THE NEXT 10 YEARS AND DUBLIN IS WELL PLACED TO MEET THE EXPECTATIONS OF THE 21ST CENTURY TRAVELLER. HOWEVER, WE WILL NOT REACH OUR POTENTIAL UNLESS WE CO-ORDINATE OUR OFFER AND MESSAGE COHESIVELY FOR THE VISITOR. IT IS TIME TO ADDRESS OUR SHORTCOMINGS AND PUT DUBLIN FIRMLY IN THE SHOP WINDOW AND MAKE OUR DESTINATION ACCESSIBLE AND EASILY UNDERSTOOD TO THE GLOBAL AUDIENCE. I BELIEVE THAT THE ENERGY AND IMAGINATION CREATED BY THE GROW DUBLIN TASK FORCE WILL BRING US TO WHERE WE NEED TO BE AND I LOOK FORWARD TO THE IMPLEMENTATION OF THE IDEAS ARTICULATED IN THIS REPORT'.

RICHARD GUINEY – Dublin City Business Improvement District

Key Features

- A funding structure that requires those stakeholders who benefit to contribute (that is, a public/private partnership in which beneficiaries of promotional activities contribute to the cost, ensuring that those who benefit from the activity, pay for the activity);
- Shared responsibility for city goals;
- A DMO structure that facilitates ambitious visitor growth; [22]
- A sustainable funding model.
- Using these criteria, Copenhagen and Amsterdam scored the highest and second highest respectively.

Key Features of the Copenhagen and Amsterdam Models

Structure and Business Model

The key aspects of the approach by DMOs in Copenhagen and Amsterdam, which are relevant to Dublin, are as follows:

- *Wonderful Copenhagen* and *IAmsterdam* are **not-for-profit, public/private partnerships** with a near 50/50 ratio of public to private funding.
- *Wonderful Copenhagen* and *IAmsterdam* both rated their **funding model as sustainable** and both cities have had sustained funding over the past ten years (20 years in Copenhagen's case) allowing for strategic planning, vision and growth.

Both cities have a fully **collaborative city approach to tourism**, and a defined **engagement structure** is in place for all sectors in each city (business tourism, cruise tourism, leisure tourism etc.) which include industry representatives and primary public stakeholders (such as the Mayor's office).

Wonderful Copenhagen has an organised **separate industry network for each sector**, such as *'Cruise Copenhagen'* and *'Meet Copenhagen'* in which all relevant stakeholders are represented. Each stakeholder contributes financially to the sector that they benefit from and are involved through a representative advisory board in agreeing projects and deliverables for that sector.

Each industry sector then reports back to the *Wonderful Copenhagen* board, which comprises both public representatives (including politicians) and private representatives from across the city.

Wonderful Copenhagen has become a **project-based organisation**. They consider this to be the best way for them to deliver an ambitious strategy. Each initiative is treated as a project, fully scoped, and a project team is assembled based on competencies required.

City Performance

COPENHAGEN

Copenhagen's year-on-year growth rate of 8.3% from 2008-2012 was the 3rd highest in Europe (Berlin and Barcelona were highest). The European average was 5%.

In the International Conference & Congress (ICCA) world ranking, which benchmarks cities according to the number of international conferences held per year, Copenhagen rose from 14th place in 2011 to 8th in 2012. Copenhagen's jump was the highest recorded of all world cities in 2012.

Copenhagen (through its Cruise Network) increased the number of cruise ships berthing from 220 in 2001 to 372 in 2012 (with 840,000 passengers).

AMSTERDAM

Amsterdam ranks 9th in Europe for international bed nights, with 8.1 million a year (Dublin had 6.1m international bed nights in 2012).

Amsterdam was ranked 10th in the 2012 ICCA Business Tourism world ranking and has sustained a top 10 position for the last 7 years.

'BOTH CITIES HAVE A FULLY COLLABORATIVE CITY APPROACH TO TOURISM, AND A DEFINED ENGAGEMENT STRUCTURE IS IN PLACE'.

22 'Ambitious' in this context means a rate of growth year-on-year higher than the European average.

BRAND

Both Copenhagen and Amsterdam have **city-wide brands**, used both by the public and the private sectors when selling their city. Copenhagen uses Open Copenhagen and Amsterdam IAmsterdam.

Copenhagen's brand was championed by 'Wonderful Copenhagen', which employs an entire brand management team.

'IAmsterdam" said that their city is defined by **cooperation**, with one city, one focus, and one brand: 'IAmsterdam'.

Critical Success Factors

The success of Copenhagen and Amsterdam in terms of growth, conferences won, and international esteem cannot be attributed to any one single factor. However, the way in which these cities have developed a rigorous structure, adopted a partnership approach to doing business, ensured sustainable funding, and built on their already strong brand recognition, all imply an exemplary business focus and commitment.

Critical success factors were identified in the cities analysed, with a view to assessing which might be relevant to Dublin. A number of factors were considered to be critical by two or more of the DMOs surveyed. These include:

- Significant private ownership;
- Corporate culture ('can do' attitude);
- Use of comprehensive data and analysis to inform strategic planning;
- Organisational flexibility;
- Stakeholder buy-in;
- Project-based approach;
- Close alignment with stakeholders/ members needs;
- Positive, cooperative relationships between stakeholders, and particularly between public authorities and tourism businesses, based on mutual respect and understanding of each other's objectives;
- A major event which brought all stakeholders in the city together, emphasising the value of collaboration.

'EACH OF THE FOUR DUBLIN LOCAL AUTHORITIES PROMOTE TOURISM WITHIN ITS OWN AREA. THE INCLUSION ON THE IMPLEMENTATION TEAM OF REPRESENTATIVES FROM DUBLIN CITY COUNCIL AND THE THREE DUBLIN COUNTY COUNCILS OF FINGAL, SOUTH DUBLIN AND DUN LAOGHAIRE/ RATHDOWN WILL ENSURE THAT THE NECESSARY TOURISM SUPPORT INFRASTRUCTURE WILL BE CO-ORDINATED THROUGHOUT DUBLIN CITY AND COUNTY AND ENSURE THAT THE STRATEGY IS "JOINED-UP" IN THIS REGARD. THIS CO-ORDINATED APPROACH WILL ALSO ENSURE THAT LARGE SCALE EVENTS ARE CO-ORDINATED THROUGHOUT THE COUNTY BOTH TO AVOID CLASHES AND TO COMPLIMENT, WHERE POSSIBLE, EVENTS THROUGHOUT THE COUNTY'.

NOELEEN MCHUGH – Fingal County Council

Dublin's Approach

Dublin will incorporate the lessons from these successful destinations in implementing the new tourism strategy. Critical elements will be:

- **A collaborative relationship:** This tourism strategy epitomises the collaborative relationship and approach required to achieve mutually agreed goals. This must continue into implementation and further planning stages in future. This needs to be based on mutual respect and an understanding of each other's objectives.

- **City and region-wide stakeholder engagement:** Engagement with stakeholders in the Dublin City and Region – at planning, design, implementation, and evaluation stages will be critical.

- **A sectoral approach:** Basing development and marketing plans on a sectoral approach – as in this strategy, which focuses on 5 sectors (Social Energisers, Culturally Curious, business tourism, vents and cruise tourism) – will both make it possible for stakeholders to work together and drive our approach to growth.

- **A project-based approach:** Undertaking discrete projects provides an action-focused approach for stakeholders to get involved in a city and region-wide project, where there is synergy with their own objectives.

- **A sustainable funding model:** Effective implementation of the Dublin tourism strategy requires a balance of funding from both the private and public sectors. The more collaborative and project-based the approach, the greater likelihood of raising the level of funding required to make a difference.

- **Performance measurement:** Identifying key performance indicators and evaluating progress against objectives will be critical to success, as well as to ensuring effective collaboration amongst stakeholders. This is dealt with below in chapter 8.

Roles and Responsibilities

The following roles and responsibilities are envisaged to implement this strategy under the aegis of the Grow Dublin Tourism Alliance:

Grow Dublin Tourism Alliance
The implementation of this strategy will be overseen by the Grow Dublin Tourism Alliance. The Grow Dublin Tourism Alliance is a partnership alliance whose aim is to drive Dublin's tourism forward through supporting Dublin's potential as a vibrant destination brand. Its key objectives are to:

- Guide implementation of the strategy;
- Facilitate synergies between stakeholders to maximise impact for Dublin;
- Represent, redefine and reimagine Dublin as a destination brand to ensure it remains fresh and resonates with potential visitors;
- Maximise the impact of the combined investment in resources by the state and tourism industry;
- Maximise the return to the state, tourism industry and citizens of the current investment of resources in the tourism sector.

Grow Dublin Tourism Steering Group
Within the Grow Dublin Tourism Alliance, the Grow Dublin Tourism Steering Group will be the body, comprising tourism sector representatives, for overseeing the implementation of the strategy and evaluation of progress against objectives.

Dublin Brand Experience Strategy Manager
At the core of the strategy lies the Dublin Brand Experience Strategy Manager, with responsibility for leading and delivering the core programmes. He/she will be charged with ensuring the Dublin brand is driven through all marketing programmes and experience developments by the sectoral groups/executive networks.

Executive Networks/Sectoral Groups
Executive Networks/Sectoral Groups will be responsible for driving the strategy for each particular sector forward: leisure tourism (Social Energisers and Culturally Curious), business tourism, events tourism and cruise tourism.

EFFECTIVE IMPLEMENTATION OF THE DUBLIN TOURISM STRATEGY REQUIRES A BALANCE OF FUNDING FROM BOTH THE PRIVATE AND PUBLIC SECTORS.

These executive groups will be comprised of representatives from each sector.

A number of projects have been identified for implementation in each sector (See chapter 5 *Action Plan*); other projects may be identified as worth pursuing as the strategy progresses. Each Executive Network will manage and drive the projects within its sector.

Ensuring the efficiency and focus of these Executive Networks will be important. For instance the cluster of businesses that operate under the Dublin Now Plus project might merit expansion into a project-driven Executive Network to drive progress in developing the leisure segments. It will also be important to take into account existing networks and relationships. For instance the Grow Dublin Taskforce acknowledges that there is an existing Business Tourism Forum and working group, which should be taken into account in exploring potential new roles and whether there is indeed a need for a new network in the business tourism arena.

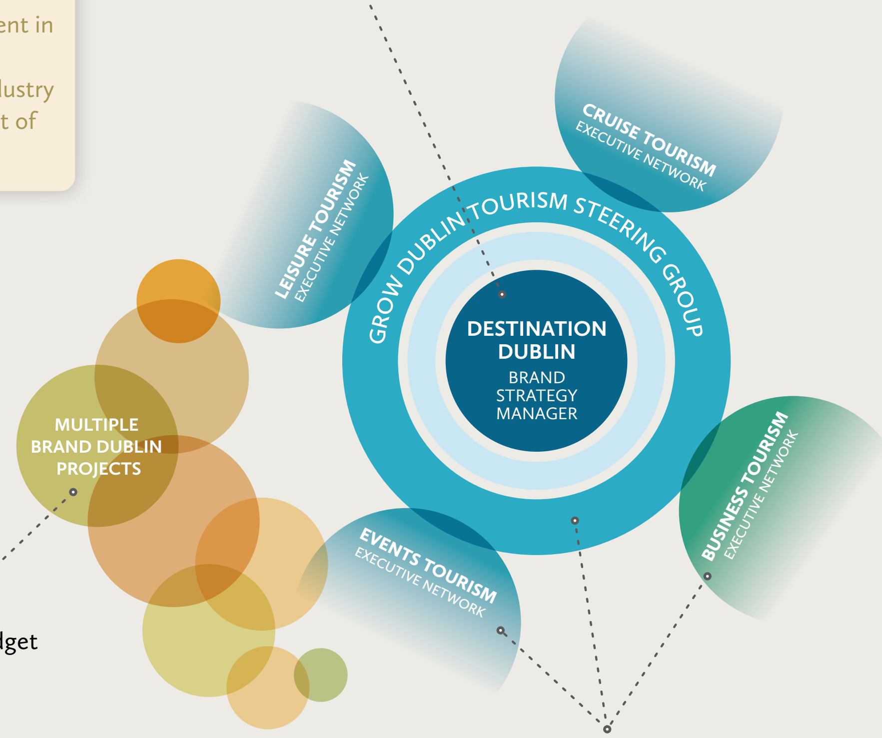
Grow Dublin Tourism Alliance

OBJECTIVES

Supports Dublin's potential as a vibrant Desination Brand

- **Guide Implementation** the GDT Strategy
- **Facilitate synergies** between stakeholders
- **Represent, Redefine and Reimagine** Dublin as a Desination Brand
- **Maximise the impact** of the investment in resources by the state and industry
- **Maximise the return** to the state, industry and citizens of the current investment of resources in the tourism sector.

DESTINATION DUBLIN Brand Strategy Manager
Responsible for leading and delivering brand strategy. Guides co-ordinates and facilitates the brand strategy through the delivery of brand tools and systems, and conveying and participating on the Steering Group and Executive Networks. Supported by Brand Dublin Executive.



BRAND DUBLIN PROJECTS
Each project has a clear objective budget and timeline and assist in delivering the brand strategy

GROW DUBLIN TOURISM STEERING GROUP & EXECUTIVE NETWORKS
Represents stakeholders and support the DDBM. They also facilitate and advocate the impleminentation of the strategy across the industry and promote Brand Dublin to the wider public.

> 'OUR RESEARCH INDICATES THAT HAVING STAKEHOLDERS ALIGNED AND WORKING CLOSELY TOGETHER WILL GENERATE REAL BOTTOM LINE VALUE FOR EVERYONE. IT WAS REALLY ENCOURAGING TO SEE THE ENERGY AND ENTHUSIASM THAT DEVELOPED WHEN CROSS-FUNCTIONAL GROUPS CAME TOGETHER AS PART OF THIS PROJECT, AND WE MUST BUILD FURTHER ON THIS'.
>
> **MARY KERINS** – DAA

Funding Model

Successful tourism destinations around the world work on a private-public partnership model, whereby resources are shared in pursuit of a common goal and the respective strengths of public and private sectors complement each other towards this end.

Funding and Resourcing the Future of Dublin's Tourism Potential

THE GROW DUBLIN TASKFORCE and the tourism industry of the Dublin region do not assume that the State can guarantee its funding support at historic levels and neither does it need the additional cost of a new State agency for Dublin alone. The State has been a vital supporter of the sector's development to date and the benefits from tourism will continue to warrant public support into the future. However, the businesses that benefit from tourism in the Dublin region will also themselves invest increasingly in their own success, not least in response to the State's recent proactive steps in reducing VAT and removing air passenger duty, as well as appreciating the proven benefits of national programmes such as The Gathering.

The complex and multi-faceted nature of the tourism economy requires productive synergy between public and private sectors to provide conditions for growth: certain functions either cannot be, or are best not, delivered by the private sector alone, for example international destination marketing and city-brand curation,. From these 'common ground' functions, the State receives its own payback on its investment, particularly from the private sector's operation of tourism services that generate employment, tax revenues and wider spending in the economy. Recognising these shared interests and the level of ambition inherent in our ambitious growth targets, the highest degree of public-private collaboration into the future is not only an option, it is essential.

The Grow Dublin Taskforce's recommended new way of working between the public and private sectors positions both as strategic collaborators for mutual benefit. This will require a new resourcing model in order to deliver success. Ahead of elaboration as to how this will work in relation to the specific programmes identified for each of the priority sectors by the new Grow Dublin Tourism Alliance, five key funding principles will underpin the development of a new funding model:

1. STATE ACCOUNTABILITY

The State rightly controls decision-making about disbursement of public funds in the tourism sector. In addition to the cost of its expert teams, that spend has typically included an estimated €15 million in 2013 in such critical areas as marketing, experience development, media visits, trade shows, festivals and events, business tourism, training and education. In addition, some €10 million in State capital grants has been awarded to tourism infrastructure projects in Dublin in the past three years including projects at Temple Bar, the Dublin Heritage Trail, the Independence Trail, Dublinia, Dalkey and Malahide Castle and at Shackleton's Garden in the Liffey Valley.

2. PUBLIC-PRIVATE COLLABORATION

Increased collaboration between the private sector and the State will leverage existing State investment and contribute to achieving optimal outcomes for all. It will also reduce duplication of effort and secure maximum engagement by the private sector in relevant State initiatives. This includes not only joint strategic planning and therefore more focused decision-making, but also the stimulation of the wider Dublin tourism sector to play its full part in actively complementing new investment in tourism initiatives, with consequential benefits for all.

3. LONG-TERM CO-FUNDING MODEL

Given the highly competitive market for city tourism, further local and international data analysis will be required in order to identify the ideal long-term public-private co-funding model (and the transition path towards it) for Dublin. On the one hand, the State is best positioned to promote Dublin internationally as a tourism destination while, on the other, the private sector already spends extensively to promote its own products at the level of individual businesses. Nevertheless, both public and private sectors acknowledge the need to stimulate consumer demand and to co-invest in stimulating and satisfying it through the coherent projection of a powerful and mutually-owned Dublin proposition, in order to fulfil the potential and ambition of this strategy.

Clearly, all recognise the importance of ensuring a transparently equitable balance of cost and benefit and the need to manage shared assets effectively. The private sector is committed to investing further in co-development of the entire sector through promoting the Dublin proposition, developing visitor experiences and nurturing tourism expertise, so as to leverage (rather than substitute for) investment by the State.

4. SHORT-TERM PROJECT-BASED FUNDING APPROACH

While more sophisticated co-responsibility models for funding and administering Dublin tourism will develop over time, the preferred model for immediate financial collaboration is project-based. Under the auspices of the Grow Dublin Tourism Alliance, representatives of each tourism sector identified in this strategy will identify specific activities to implement the programmes and projects outlined in the action plan for their sector and draft appropriate budgets and performance targets for approval and action. This will provide an initial schedule of specific projects aimed at delivering growth. These will be analysed for their segment resonance and viability and appropriately co-funded by both the State and the private sector. Such projects might, for instance, include the necessary joint infrastructure to develop and sustain a commercially-managed brand for Dublin or the realisation of projects such as, a new Dublin Literary Centre or to support major event bids, each innovatively executed to maximise cross-community participation and gain. Delivery and subsequent commercial performance of these projects will be closely monitored against pre-agreed metrics. Rigorous measurement of robust targets will be important – not just to ensure business success, but also as evidence to demonstrate the efficacy of this collaborative funding model and thereby to encourage more extensive take-up and application of it by a wider range of stakeholders.

5. LONG-TERM HORIZON

Beyond such immediate short and medium terms projects, certain tourism initiatives will require appraisal using a much longer-term investment horizon. The Grow Dublin Taskforce acknowledges that the long-term strategic business case for Dublin tourism is prima facie strong, but it will certainly benefit from more detailed calibration and articulation. The challenge for all stakeholders in Dublin's tourism sector now is to collaborate to assemble the evidence for a compelling long-term investment strategy, sufficient potentially to warrant National Strategic Investment Funds in partnership with private funds and to leverage the city region's undoubted assets and potential. Methodological inspiration might be gained from the comprehensiveness of the Dept. of Agriculture's *Harvest 2020*, in order to provide clear evidence of impact and drive

Funding Model

significant national returns well into the future. Commercial confidentiality aside, this will require stakeholders to commit to provide evidence of business impact arising from collaborative projects.

6. SHARED RESOURCING

This shared resourcing of the sector's future is not just about the respective cash contributions of public and private contributors to tourism in Dublin; it is also about sharing other important resources such as expertise, research, communications and digital technology, in a truly jointly-owned collaboration. Indeed, while other international cities certainly feature shared public-private funding models, a key feature of those cities' success is how they also share their wider resources. This will build on the collaboration achieved under the *Dublin Now* initiative and be activated and brokered by the Grow Dublin Tourism Alliance. Joint-funding will initially be largely on a project basis, within the broader context of the strategic aims of the core sectoral groups established to implement this strategy. This will not only underpin joint development of new visitor experiences and the marketing of Dublin, but it will also enable better joint input to the strategic plans and work programmes of all State agencies and private initiatives in other areas of Irish life, so that no opportunities are missed and the best mutual outcomes are achieved.

7. GROWTH POTENTIAL

Dublin's growth potential is clear, in terms of how the city and region offer what target markets are seeking. The link that will enable Dublin to achieve this potential is a truly collaborative approach, based on mutual understanding, trust, and shared resources.

'DUBLIN'S GROWTH POTENTIAL IS CLEAR, IN TERMS OF HOW THE CITY AND REGION OFFER WHAT TARGET MARKETS ARE SEEKING'.

‘THE GREAT VALUE IN THIS STRATEGY IS THAT IS SURFACES A STRATEGIC COINCIDENCE IN TOURIST PREFERENCES AND EXPECTATIONS AND WHAT DUBLIN CITY AND COUNTY HAS TO OFFER INCLUDING THE EXTENSIVE RANGE OF AMENITIES AND ATTRACTIONS ON DUBLIN’S DOORSTEP RANGING FROM THE DIVERSE LANDSCAPE OF OUR COASTLINE, VALLEYS AND MOUNTAINS, OUR TRADITIONAL VILLAGES RICH IN CULTURE AND HERITAGE AND ACCESS TO OUR HISTORICAL PAST THROUGH THE STORIES OF OUR ESTATE HOUSES AND CASTLES’.

DANIEL MCLOUGHLIN – County Manager, South Dublin County Council

7 IMMEDIATE ACTIONS

What are Dublin's immediate priorities in implementing this strategy?

How can the momentum generated by the Grow Dublin Taskforce be translated swiftly into action that delivers visible progress?

Key Enabling Projects

This chapter lists a number of short-term measures that can be implemented over the first three months of the strategy's implementation to ensure that the momentum built up by the Grow Dublin Taskforce is maintained and measurable progress is made towards the targets.

- Establish an **implementation team** to drive the strategy forward, with representatives from all committed stakeholders.
- Develop brief for, and commission work on, the new **Dublin Brand Identity**.
- Identify key stakeholder partners, who will work together and commit resources towards a shared goal within the context of the new **private-public funding model**.
- Develop a high-impact **marketing communications and media plan** to promote the new Dublin proposition in overseas markets.
- Develop a **citizen engagement plan**. Produce a factsheet illustrating the new proposition, with key tourism facts (e.g. jobs, revenue etc.), and distribute it through key channels.
- Develop the first iteration of the framework to **Bring Dublin to Life**, including key themes, with inputs from Social Energiser and Culturally Curious experience-development teams.
- Develop the specifications for the **digital platform**. Identify a development partner.
- Develop the **visitdublin.com** site to create an expanded calendar of events, as well as building on existing information, over the wider Dublin City and Region. Clarify the process for event organisers to post details. As a successful internationally focused, Dublin-centric site, visitdublin.com will continue to provide the basis for digital communications with visitors. It will be further developed to meet the needs of the two key leisure segments (Social Energisers and Culturally Curious)

Actions to Attract More Visitors for Major Events

- Establish an **Events Dublin Forum** to bring together key stakeholders, including event organisers, accommodation and service providers, and develop a major events strategy. Identify three international events to bid for over the next three years. Start work on developing a mechanism for generating major events with international appeal.
- Four local authorities to develop a common set of protocols, checklists, and good practice **guidelines for event organisers**.

Actions to Attract More Leisure Visitors

- Start to extend 'Dublin Now' initiative for Social Energisers into other geographical markets ("**Dublin Now Plus**').
- Identify and develop **partners with complementary interests in promoting Dublin to Social Energisers and the Culturally Curious** – such as leading edge digital companies. Outline plan of activities for year ahead.

'DEVELOP A COMMON SET OF PROTOCOLS, CHECKLISTS, AND GOOD PRACTICE GUIDELINES FOR EVENT ORGANISERS'.

Actions to Attract More Business Visitors

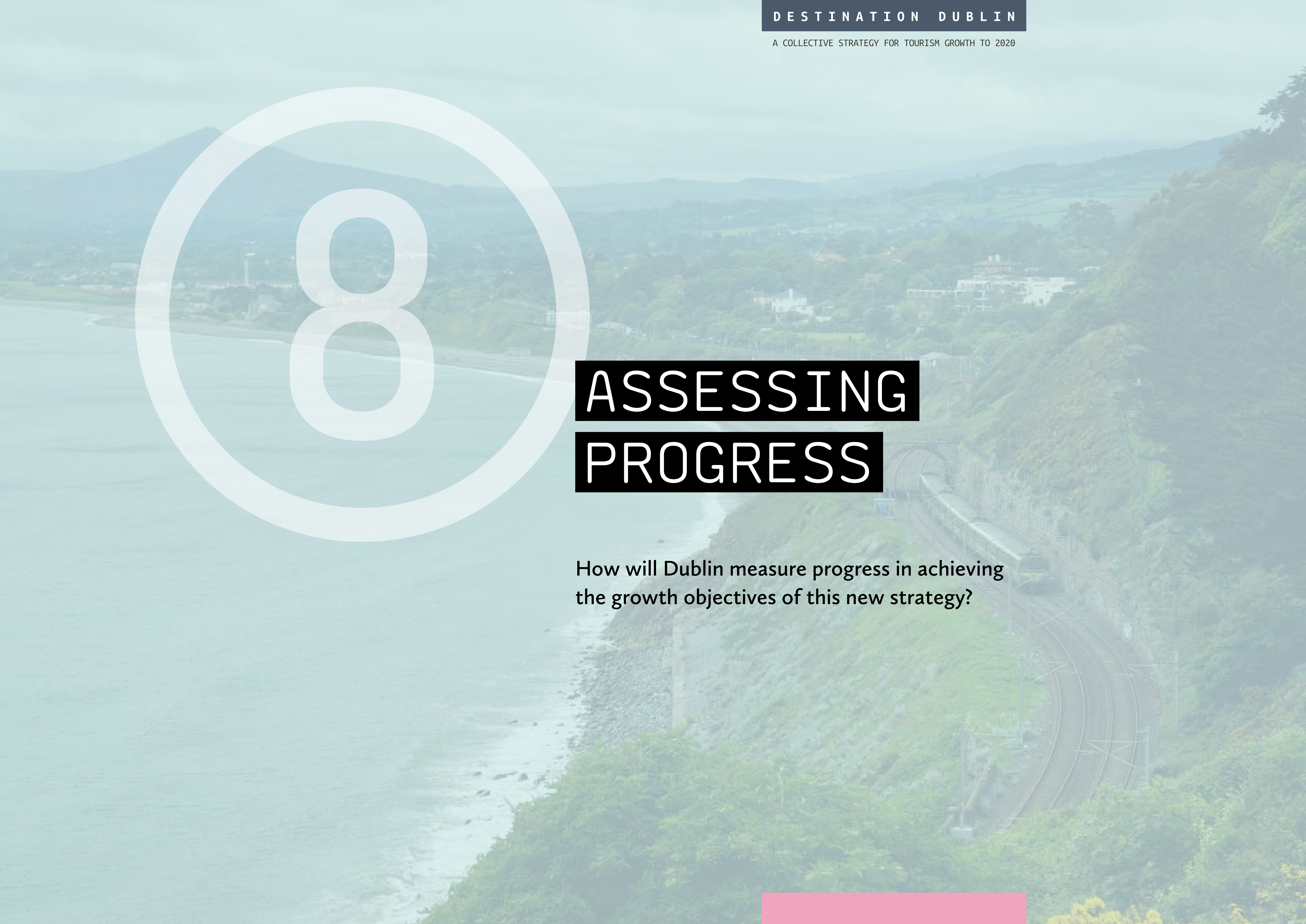
- Develop a large **conference bid strategy** with key stakeholders. Identify three potential conferences to bid for over the next three years.

Actions to Attract More Cruise Visitors

- Formally establish a **Cruise Dublin Forum** to bring together all relevant stakeholders and develop a strategy for attracting and catering for more cruise traffic.
- Develop a **marketing plan** to attract more cruise traffic. Identify key decision makers in the cruise industry. Visit three cruise companies to apprise them of the new Dublin proposition. Identify and exhibit at a major cruise trade fair.

'THIS REPORT IDENTIFIES THE SIZE OF THE PRIZE, IT'S NOW UP TO ALL STAKEHOLDERS TO WORK TOGETHER TO ACHIEVE THAT AND MORE. THROUGH WORKING COLLABORATIVELY IN A COHESIVE MANNER DUBLIN'S OPPORTUNITIES ARE UNLIMITED. THE GROW DUBLIN TASKFORCE REPORT IS THE LAUNCH PAD FOR A NEW WAY OF WORKING TOGETHER AND REALISING NEW POTENTIAL'.

PAUL GALLAGHER –
Irish Hotel Federation



8 ASSESSING PROGRESS

How will Dublin measure progress in achieving the growth objectives of this new strategy?

Growth Projections

This chapter sets out the key performance indicators that will be used to monitor progress in achieving growth over the next seven years. Specific targets will be set by the Executive Groups or organisations responsible for implementing the strategy in each sector, once resources have been identified.

THE GROW DUBLIN TASKFORCE IS CONFIDENT that this new tourism strategy, underpinned by a reenergised, refocused destination brand, will drive a significant increase in visitor numbers into Dublin over the coming years. The level of the increase will depend on a number of factors, some external and some internal.

The brand and the strategy are focused on the geographical markets, tourism sectors, and visitor segments that have the greatest potential for growth and whose needs and expectations can be satisfied by the Dublin proposition: Social Energisers (leisure), Culturally Curious (leisure), 'promotable' business tourism (i.e. mainly conference and incentive sectors), events, and cruises.

The extent to which growth can be achieved will depend on successfully working together, on maintaining existing levels of funding and on the extent to which new investment in marketing and development can be attracted. We are confident that success will breed further success – as stakeholders see how the new collaborative approach yields results. It will be important to communicate evidence of success to stakeholders, such as that achieved in the 'Dublin Now' project, which included events such as the Bram Stoker Festival and New Year's Eve Dublin. The more such evidence of success can be demonstrated, the clearer and stronger the argument for greater collaboration to deliver this strategy becomes.

Key Performance Indicators

A clear set of key performance indicators (KPIs) and a measurement framework, are essential to enable us to focus our resources and drive towards achieving our objectives. KPIs are proposed as follows:

Market Share

- Percentage growth in visitor numbers to Dublin compared with international trend.

Visitor Numbers and Revenue

- Number of visitors into Dublin from overseas, broken down by business, leisure, cruise, and by geography and segment.
- Total spending by overseas visitors in Dublin, broken down by business, leisure, cruise, and by geography and segment.
- Average spend per visitor, broken down by business, leisure, cruise, and by geography and segment.
- Average length of stay, broken down by business, leisure, cruise, and by geography and segment.

Communications

- Percentage of available leisure market planning a visit to Dublin, by geography and market segment.
- Percentage of the discretionary business travel market planning a visit to Dublin, by geography and segment.

Stakeholder Engagement

- Number and percentage of key trade partners adopting the new Dublin proposition.

Experience Development

- Percentage of holidaymakers in each geographical market who would 'definitely' recommend a visit to Dublin.

Value for Money

- Percentage of holidaymakers in each geographical market ranking Dublin as 'good' or 'very good' value for money.

Employment Creation

- Employment in the accommodation, food service and events sectors.

Brand Value

- **Brand Recognition:** Track recognition of the new Dublin brand and associations amongst non-visitors against our desired brand attributes – vibrant, variety, surprising, diverse experiences, city and natural outdoors
- **Brand Esteem:** Poll departing visitors and track impact of the new Dublin proposition over time to establish a clear movement in the perceptions. (As this is a 6 year programme it will be incremental)
- **Competitiveness:** Assess perception of Dublin's brand attributes (vibrant, variety, surprising, varied experiences, city and natural outdoors) against similar attributes in Dublin's main competitor cities.

Measurement

Measurement will be tailored around tracking overall performance and segment performance. Ideally and subject to budget, progress against these KPIs should be evaluated annually.

Detailed targets will be drawn up by the relevant groups or organisations as the implementation phase begins, according to which growth strategy is aimed for. In addition to the quantitative measures outlined above, other factors will be assessed to add to the evaluation of Dublin's performance and the impact of its new brand. These will include external rankings (e.g. ICCA rankings, European Cities Marketing rankings, city indices, such as the Anholt-GfK Roper Index, and others), surveys such as residents' attitudes surveys etc., and brand-tracking surveys, as appropriate and available.

The KPIs to be applied will depend on which of the three scenarios outlined above in chapter 2 are selected.

> 'THIS PROJECT HAS MADE IT VERY CLEAR - DUBLIN HAS NEVER BEEN IN BETTER SHAPE AND NEVER HAD MORE OPPORTUNITY TO AMAZE MORE VISITORS THAN NOW. THE DUBLIN REGION IS FILLED WITH TOURISM POTENTIAL AND IT'S OUR JOB TO REALISE THAT POTENTIAL FOR THE GOOD OF EVERYBODY, TOGETHER. AND BEST OF ALL, THE SECRET SAUCE - COLLABORATION - IS FREE! IT'S TIME TO DO IT. TOGETHER. NOW'.
>
> JOHN MCGRANE – Dublin Chamber of Commerce

9

MEMBERSHIP PROCESS

The Process Behind the Strategy Development and Grow Dublin Task Force Membership

The Grow Dublin Taskforce

Background to the Establishment of the Grow Dublin Taskforce

Dublin is Ireland's leading tourist destination and plays a pivotal role in the visitor experience of most visitors to the island of Ireland. In an era favouring short and more frequent breaks, Dublin is also well placed to take advantage of the trend towards city breaks.

Tourism in Dublin has declined since its peak in 2007, although some markets are showing signs of recovery. Nevertheless, there are grounds for believing that Dublin could do much better, given its portfolio of attractions and events, supporting infrastructure and points of access. Recent consumer research conducted within the key target markets indicates that Dublin's true potential is far from tapped. Realising this potential, however, requires a coherent and appropriately funded strategy, which is owned and implemented by all major tourism stakeholders in the Dublin city and region.

Fáilte Ireland, as the National Tourism Development Authority, has a responsibility to progress the development of such a strategy. It is the Authority's strongly held belief that, given the very multi-faceted nature of the tourism offering and its extensive interdependencies across the Dublin economy, this task is best progressed in a collaborative manner.

To that end individuals and executives from across the public and private sectors with an interest and stake in the future of Dublin tourism came together in December 2012 to form the Grow Dublin Taskforce. The Taskforce was led by a Steering Group that included industry representatives and executives of the various supporting agencies, supported by Working Groups. The Working Groups comprised a broad representation from the Dublin tourism industry – both public and private - in order to ensure that appropriate expertise and experience were brought to bear on the development of the strategy.

The objective of the Taskforce was to deliver a tourism strategy and implementation plan for the period to 2020 that realises Dublin's potential to attract increased levels of tourism. This strategy will require the active collaboration of *all* involved in communicating, developing and delivering the Dublin tourism experience, including the city and county councils, the businesses involved in providing goods and services to visitors, the cruise and events sectors, and the Dubliners themselves.

The Opportunity

The rate of growth of visitor numbers into Dublin is below that of Dublin's main capital city competitors, such as Copenhagen and Amsterdam – cities that have a more clearly defined and coherent offering. Dublin fell out of the Top 10 TripAdvisor Destinations in 2013. The aim of the Taskforce is to re-establish Dublin as one of the most desirable, 'must see' visitor destinations in the world.

To achieve this, we have defined a compelling, competitive destination brand idea for Dublin city and region that is motivating to potential tourists, gives direction and inspiration to stakeholders, and is capable of sparking an implementation plan that will attract more visitors and more revenue to Dublin. The brand will unite the various elements of the visitor experience under a unifying theme that will attract more visitors and will deliver an experience that they will want to repeat and to tell their friends and family about.

This presents a considerable challenge: the development of a destination brand is fundamentally different and more complex than branding a product or service. It requires us to capture the essence of Dublin and to ensure that the articulation of this essence is both competitive *and* compelling to potential visitors – and it needs to be done in a way that supports and is supported by the Ireland brand.

The brand proposition must reflect what is relevant and motivating to potential visitors, both now and over the next seven years and beyond. A refreshed and re-energised Dublin brand will ensure growth by reframing Dublin – both for visitors and for Dubliners. It will change existing perceptions and create excitement and a focal point for all stakeholders involved in delivering the visitor experience.

The Process

The Grow Dublin Taskforce developed the strategy and the plans for implementing and promoting it in three main stages:

- Discovery and getting input to proposition areas
- Visitor proposition research in the US, mainland Europe and Great Britain
- Stakeholder research and strategy development

Review of earlier work

The Grow Dublin Taskforce began by reviewing all available reports on tourism in Dublin and competitor cities. These revealed a clear need for Dublin to develop a powerful, differentiated destination brand proposition clearly positioned in the context of the other important elements of the Ireland brand, including those developed by Tourism Ireland, Enterprise Ireland, IDA Ireland, Bord Bia, and Culture Ireland.

Substantial guidance was obtained from two separate but related projects – the Irish Tourism Industry Confederation's report *Capitalising on Dublin's Potential*, and the Creative Dublin Alliance's work on *Activating Dublin*.

Documents reviewed in the development of a differentiating proposition for Dublin:

1 **Irish Tourism Industry Confederation, *Capitalising on Dublin's Potential* project:**
   - i. Background papers (Research material)
   - ii. Executive Summary
   - iii. Main Report

2 **Creative Dublin Alliance:**
   - i. Brand Dublin Roadmap
   - ii. Discovering Dublin's Identity
   - iii. The Compendium Designing Dublin: Learning to Learn
   - iv. Love the City
   - v. Activating Dublin Scoping Material
   - vi. City Indicators & International Benchmarking Reports
   - vii. Activating Dublin City Benchmarks
   - viii. Activating Dublin Destination Dublin
   - ix. Activating Dublin Tourism Business Case

3 **Dublin Regional Authority:** Dublin's Role in the National and Global Economy Report 4 - Synthesis Report. Reports 1 to 3 also available.

4 **Development Plans of the four Dublin local authorities** set out the framework for the future development of the city/county, and help to emphasise the regional importance of this work:
   - i. Dublin City Council: Dublin City Development Plan 2011 – 2017
   - ii. Dún Laoghaire-Rathdown County Council: Dún Laoghaire-Rathdown County Development Plan 2010 – 2016
   - iii. Fingal County Council: Fingal Development Plan 2011-2017
   - iv. South Dublin County Council: South Dublin County Development Plan 2010-2016

5 **Destination Branding**
   - i. Destination Branding (2002) Morrison & Anderson
   - ii. How to Brand Nations, Cities and Destinations (2009) Moilanen & Rainisto
   - iii. Introductions to the Theory of City Branding (2011) Keith Dinnie

6 **Branding**
   - i. Aaker D.A. (1991) Managing Brand Equity – Capitalising on the Brand Name
   - ii. Aaker D.A. (1996) Building Strong Brands
   - iii. Blackstone M. (1992) Observations: Building Brand Equity by Managing the Brand's Relationships, Journal of Advertising Research
   - iv. Fyall, A.C. Callod and B. Edwards (2002) Relationship Management – The Challenge for Destinations – Annals of Tourism Research
   - v. Kapferer J.N. (1992) Strategic Brand Management
   - vi. Sharp B.M. (1993) Managing Brand Expectations. Journal of Customer Marketing.

7 **Global Reports**
   - i. Intuit 2020 Trends Report (2010)
   - ii. OECD Paper on the Middle Classes
   - iii. Technology & Tourism 2020 – Vision Tourism 2020
   - iv. The Economist – Special Report on Aging
   - v. The Economist – Special Report on Middle Classes

8 **Fáilte Ireland Reports**
   - i. Dubline Interpretative Matrix
   - ii. Dubline Toolkit
   - iii. Dublin Destination Study - Destination VAS Results (unweighted)
   - iv. Dublin Doorstep Destination Study - Destination VAS Results (unweighted)
   - v. Future Tourism Demand Insights, Internal Briefing Paper
   - vi. Topline findings from Segment Research (2012)

9 **Tourism Ireland Reports**
   - i. Brand Tracker, France, (2012) Millward Brown
   - ii. Brand Tracker, Italy, (2012) Millward Brown
   - iii. Brand Tracker, Spain (2012) Millward Brown
   - iv. French Market Profile
   - v. French Review Strategic Plan 2011-2014
   - vi. Italian Market Profile
   - vii. Spain Market Profile
   - viii. TI Segmentation, MCCP & Arkenford

10 **Other Dublin Research**
   - i. Blue Sail Dublin City plus marketing blueprint
   - ii. Blue Sail Dublin City plus: a shared story
   - iii. Business Tourism Ireland Positioning, (2009) Jump
   - iv. Design Factory, Discovering Dublin Outputs from the Discovering Dublin Branding Workshop
   - v. Meeting in Ireland Brand Story, (2010) Tourism Ireland

The Grow Dublin Taskforce

Brand Strengths and Weaknesses

The Taskforce undertook a review and distillation of brand strengths and weaknesses, as well as existing brand insights and propositions, and this led to the development of a new proposition for Dublin.

City and County Council Development Plans

Tourism is featured in all four local authorities' Local Plans in the Dublin City and Region: Dublin City Council, Fingal County Council, South Dublin County Council and Dún Laoghaire-Rathdown County Council. Vibrancy, diversity, innovation-based, sustainable tourism/ environmental focus, green, clean, tourist-friendly facilities and the need for collaboration to the benefit of tourism are all highlighted as important in the City and County Development Plans to varying degrees.

In the Dublin City Development Plan 2011-2017 all developments have tourism in mind and the core strategy highlights three necessary elements in the vision:

- A compact, quality, open, clean, connected city;
- Real economic recovery, creative networks;
- Creating sustainable neighbourhood communities.

The vision for the city is that within the next 25 to 30 years, Dublin will have an established international reputation as one of the most sustainable, dynamic and resourceful city regions in Europe, and that Dublin, through the shared vision of its citizens and civic leaders, will be a beautiful, compact city, with a distinct character, a vibrant culture and a diverse, smart, green, innovation-based economy. It will be a socially inclusive city of urban neighbourhoods, all connected by an exemplary public transport, cycling and walking system and interwoven with a quality bio-diverse green space network. In short, the vision is for a capital city where people will seek to live, work and experience as a matter of choice. Two of the key projects referred to in this document are the development of Dublin Bay and the development of Dublin's Cultural heritage.

The Fingal County Council Development Plan 2011-2017 highlights the importance of collaboration and tourism:

- Commitment to developing the airport as the principle gateway to Ireland
- Considerable scope for developing tourist friendly local resources
- A clear environmental focus that would be complimentary to the development of tourism.

The Dún Laoghaire Rathdown Development Plan 2012-2016 recognises the Council's role in promoting sustainable tourism and securing the development of tourist-orientated facilities in the county.

Maximising our Potential for Success

Dublin's Role in the Irish and Global Economy 2012 Working Paper summarises many of the threats to Dublin asserting a competitive advantage. ITIC research materials include others, such as access and signage inadequacies, lack of investment in infrastructure, lack of physical connectivity, interregional competition and products lacking sufficient cultural attractions. Media and trade reports indicate that Dublin's tourism product is becoming tired and needs new attractions for younger visitors. Existing brand reports, including the Creative Dublin Alliance documents, ITIC research materials, and Discovering Dublin's Identity Report, all point to important success factors such as the need for accessibility, increasing WiFi, and improving transport links.

All reports note that recommendations by people who have influence in and over the experience on the ground are crucial for success and in this respect the general public in Dublin and the media are important participants. Visitors also want an authentic experience and to see the living city. Thus it is essential that Dubliners take ownership and pride in their city, and be receptive to tourists. The Branding Dublin Roadmap highlights the potential of the diaspora – as evidenced by the success of The Gathering in 2013.

Competitive Brand Development

The Irish Tourism Industry Confederation's *Capitalising on Dublin's Potential* project contains a competitive analysis. This makes it clear that although history and culture are key elements in Dublin's competitive offering, they are not sufficiently unique or competitive. Dublin needs to articulate a proposition that reflects the reality of the city and its region, that differentiates it from its competitor cities, and that is compelling and attractive.

'THE GROW DUBLIN TASK FORCE EXPERIENCE HAS BEEN AN EXCITING 12 MONTH EXPLORATORY JOURNEY OF REDISCOVERY OF OUR CAPITAL CITY, ITS PEOPLE, ITS TALENT, ITS NATURAL ENVIRONS AND INFRASTRUCTURE. BUT WHAT MAKES DUBLIN REALLY SPECIAL IS THE COLLABORATIVE APPROACH IT TAKES IN DRIVING ITS TOURISM STRATEGY AS ONE. COLLABORATION THROUGH THE GDT PROCESS HAS RESULTED IN ENHANCED UNDERSTANDING AND EDUCATION ACROSS ALL SECTORS. THIS IN TURN HAS LED TO A POWERFUL COMMITMENT, ENERGISED ENGAGEMENT AND AN IMPROVED VISION FOR DUBLIN. MOST IMPORTANTLY, IT HAS OPENED OUR EYES TO OPPORTUNITY. THE COLLECTIVE ENERGY OF ANY INDUSTRY WORKING IN HARMONY LEADS TO STRATEGIES BEING EFFECTIVELY TRANSLATED INTO ACTIONABLE PROJECT PLANS WITH CLEAR RESPONSIBILITIES. EXCITEMENT FOR THE "TO BE" STATE EASILY OVERCOMES THE INERTIA OF THE STATUS QUO'.

NICOLA MCGRANE – ITIC

The Grow Dublin Taskforce

All reports reviewed emphasise that Dublin must focus on packaging and communicating itself in a way that complements and enhances its existing identity. A complete review of positive elements across all reports revealed many potential proposition elements. These were distilled into a range of propositions for industry and stakeholder comment. Six propositions were researched during July 2013. Key elements that were deemed to be important to the distinctive Dublin proposition included:

- A friendly, green, cultural and fun destination
- A compact city with a feeling of intimacy
- Using technology to market Dublin
- A global city with a small-town feel; a walkable city with 78 sq.m. of green space per person
- A city of paradoxes/contrasts (high and low, mountain and sea, playful and intense, historical and modern, traditional and quirky, etc.)
- Access to mountains and coast; on the doorstep of Europe
- Close to nature
- Outstanding literary and cultural heritage
- A mischievous, quirky and unpredictable personality
- Friendly people

The ITIC CODP report emphasises that the Dublin proposition must embrace both the city centre and the wider Dublin region.

In terms of negative image perspectives that need to be addressed, many documents reviewed acknowledge the need to redress the imbalance between alcohol and cultural activities.

The Dublin Word Cloud clearly demonstrates that associations with alcohol and alcohol-based activities are stronger than historical or cultural associations. This was confirmed by subsequent research undertaken by the Grow Dublin Taskforce in four countries[1].

Addressing Visitors' Needs

The final piece of the review was to assess what visitors expect or need from a short break. A review of existing research showed visitors expressing leisure needs as follows:

- New and different – 'wow' factor
- Be entertained, enthused and to learn
- Have fun
- Enjoy a variety of experiences (from small-scale to large-scale)
- Authenticity – meet real people, see living culture
- Get to the heart of the experience quickly
- Belong
- Hear traditional and contemporary Irish music
- Sense of connection
- Hear interesting stories and learn something new about Dublin
- Experience traditional and contemporary culture/history
- Experience living culture (and the energy behind that)
- Social currency
- Easy access and navigation
- Do what the locals do
- Engaging stories
- Discover a place for myself
- Value

The Development of the Proposition

The next step in Dublin's destination brand project was to develop a number of propositions that capture Dublin's ability to meet the visitor needs and that incorporate the insights gained.

The Taskforce set out a number of defining characteristics of Dublin, as follows:

Dublin is different because:

- Of the diversity of the events to be experienced at any one time in any one visit
- It is on Europe's doorstep and is easy to combine with a visit to another European destination
- It is a city of paradoxes
- It is a truly interactive modern city
- It is a city of surprises
- It is the city by the sea
- It is a compact and concentrated city
- You can be in the city yet feel like you're in the countryside
- In a world where the impersonal is replacing the personal, Dublin is still a real city of real people
- It is socially inclusive and infectious

These initial ideas were developed into coherent propositions in an interactive workshop assisted by tourism branding consultants, and these were tested in a variety of ways. Accounts were created on Facebook and Twitter (#dublinislistening), and key stakeholders, bloggers and social networkers were involved to extend the reach of the campaign. Questions were posted to start the debate and real-time insights were gathered from overseas visitors to Dublin and from Dublin residents.

1 Grow Dublin Taskforce MCCP qualitative visitor research 2013

The propositions were presented to a broad range of tourism industry stakeholders during an Engagement Day, during which they were further refined. The propositions below are those that first went to stakeholders, followed by the revised proposition after stakeholder commentary from the workshop:

INITIAL DRAFT PROPOSITION	REVISED PROPOSITION
Dublin is a playground of mischief & laughter: Feisty, youthful, intelligent wit, creative & smart, evolving but not losing a sense of where we come from, where you can let your fun side out	**Dublin is a city that becomes your playground**
Dublin is a city of Contrasts: Dublin is unexpected, there is something different, out of the ordinary and surprising around the next corner. Get right to the heart of it.	**Dublin, a city of surprising contrasts**
Living the Vibe of Dublin: Access to Dublin life, where the Dubs go, living city, being able to live the vibe of Dublin and experience Dublin as a living organism.	Excluded – not powerful enough on its own and covered by 'playground', above
Dublin is concentrated and compact: Not diluted or made for tourists, youthful, intelligent, feisty and full on – day and night, a mischievous playground	**Dublin, the village city**
Dublin is a place where you can connect with and experience colourful history **Dublin is the City of Stories, Engagingly told**	Merged to become: **Dublin. A city of surprising contrasts**
Dublin is a Cultural City with a Creative Edge	Excluded as a proposition in its own right – Dublin needs to be more than the cultural city, given the competitive set, but culture is a crucial element to be carried across and support all propositions.
Dublin is a city by the sea, beneath the mountains – much more than urban	**Dublin City, where mountains meet the water**

The Taskforce reviewed Dublin's main issues and reassessed the brand objectives in light of the research as follows:

- Dublin lacks a differentiating proposition in the mind of the potential visitor. This leads to a shortage of reasons to visit. There is no derived social status from visiting Dublin.
- Dublin is seen mainly in the context of brand Ireland, and thus carries some stereotypes that conflict with short break motivations.
- The Dublin image lacks vibrancy and modernity, and its cultural and historical associations can be seen as dry and dusty.

Together, these outline the key barriers to the growth of tourism in Dublin:

- Lack of awareness of what Dublin offers, and
- The distorted and limited view of Dublin as dusty and old-fashioned.

The challenge is to surprise people with the reality of a Dublin that is modern, diverse and distinctive.

In the final stage of developing the proposition, six alternative propositions were tested and validated in July 2013 in interactive workshops with key target segments (13 groups, with 90 participants across four overseas markets – Great Britain, Germany, France and the US – and a group of recent immigrants to Dublin. The six propositions that were put to these groups were:

- Dublin: the capital city where playful energy is catching
- Dublin: a capital city of surprising contrasts

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- Dublin: the city that's bursting with life, packed with things to do around every corner
- Dublin: the capital city that takes you in so you become one of us
- Dublin: the capital city where urban life thrives side by side with Mother Nature
- Dublin: the capital city of colourful stories brought to life.

Research findings were clear and unanimous in all markets – the fifth proposition above ('the capital city where urban life thrives side by side with Mother Nature') holds the most potential. It is truly competitive and distinctive as a proposition area for Dublin, but it needs to be strengthened to heighten Dublin's vibrancy and unexpectedness.

A further stakeholder engagement day was held to disseminate and validate consumer findings and to receive input into the recommended proposition developed from research. The final proposition that was agreed by the Taskforce with the support of all stakeholders was:

DUBLIN IS THE VIBRANT CAPITAL CITY BURSTING WITH A VARIETY OF SURPRISING EXPERIENCES – WHERE CITY LIVING THRIVES SIDE BY SIDE WITH THE NATURAL OUTDOORS.

Focus on the Visitor

The Grow Dublin Taskforce identified five sectors – Business, Events, Cruise, Social Energiser, and Culturally Curious – that have potential for significant growth:

- Visitors to Dublin for business reasons;
- Leisure: 'Social Energisers' – young couples and adult groups looking for excitement, new experiences, and fun, social getaways to novel destinations. They typically want city breaks that offer fun, laughter and lots of day- and night-time activities.; and
- Leisure: 'Culturally Curious' – mostly older couples or solo travellers with time (and money) to spend. They are independent 'active sightseers' looking to explore new places and broaden their minds. They want to 'do a place', both its culture and the beauty of its landscape. They respond well to good information, and of all the groups are best disposed towards Ireland as a destination.
- Visitors to Dublin as part of a European cruise;
- Visitors coming to Dublin for a specific event;
- Visitors arriving in Dublin as part of a European cruise.

The Taskforce set up working groups to analyse the market in each of these segments and to identify ways in which Dublin could realise its potential for attracting those visitors. These working groups met on several occasions in 2013, and drew up comprehensive plans for developing their markets, based on the new Dublin brand proposition.

The reports from these working groups were reviewed by the Taskforce, and common themes were identified and developed as key projects.

Maintaining Momentum

One of the main conclusions reached by the Grow Dublin Taskforce is that success will depend on collaboration and cooperation between the various public bodies, industry groups, and service providers. The process of developing this strategy and the sector plans in this document was an important first step in this regard, and the participants in the process are unanimously enthusiastic about continuing to engage in the implementation phase.

Together, the participants in the Grow Dublin Taskforce have subscribed to a focused and unifying commitment:

> **'We will work together to unlock Dublin's vibrancy and diverse, surprising experiences'.**

This commitment, and the enthusiasm with which the new Dublin proposition is adopted, is the most critical element in the drive to attract more visitors. It is the catalyst that will re-energise the industry and enable participants to see the city in a new light, to talk about it in a new way and to create new business opportunities. It provides the motivation and the focus for developing new visitor experiences, for revitalising existing ones and for promoting Dublin as a destination that is a vibrant, exciting place to visit.

With the new proposition and the energy that the industry puts behind it, Dublin can be repositioned as one of Europe's top destinations, both for business travellers and for leisure tourists.

The Grow Dublin Taskforce Membership

Steering Group
Lucy McCaffrey – Chairperson
Danny McLoughlin – County Manager South Dublin County Council
Jim Dunne – Creative Dublin Alliance
Mary Kerins – Dublin Airport Authority
John McGrane – Dublin Chamber of Commerce
Richard Guiney – Dublin City BID
Brendan Kenny – Dublin City Council
Philip Maguire – Dublin City Council (from April 2013)
John Tierney – Dublin City Council (until April 2013)
Shaun Quinn – Fáilte Ireland
Philomena Poole – Fingal County Council (until June 2013)
Paul Gallagher – Irish Hotels Federation
Nicola McGrane – Irish Tourism Industry Council
Cllr. Oisín Quinn – Lord Mayor of Dublin,
Cllr. Naoise O'Muiri (until June 2013)
Niall Gibbons – Tourism Ireland
Ciarán O'Gaora – Zero G

Working Groups
Jim Dunne – Creative Dublin Alliance
Mary Kerins – Dublin Airport Authority
John McGrane – Dublin Chamber of Commerce
Richard Guiney – Dublin City BID
Paul Clegg – Dublin City Council
Lorna Maxwell – Dublin City Council
Margaret Geraghty – Dublin City Council
Kiela Brodigan – Fáilte Ireland
Keith McCormack – Fáilte Ireland
Aidan Pender – Fáilte Ireland
Miriam Kennedy – Fáilte Ireland
Orla Carroll – Fáilte Ireland
Noleen McHugh – Fingal County Council
Paul Gallagher – Irish Hotels Federation
Nicola McGrane – ITIC
Peter Nash – Tourism Ireland

Business Tourism Working Group
Sue Uda – A Touch of Ireland
David Monks – Burlington Hotel
Nicola McGrane – Conference Partners
Jenny Finegan – Dublin Convention Bureau
Keith McCormack – Fáilte Ireland
Mary Cunningham – MUSA
Willie Sheils – South Dublin County Council
Christoph Haustein – Tifco Hotel Group

Cruise Tourism Visitors Working Group
Miriam Brady – Dublin Bus
John McGrane – Dublin Chamber of Commerce
Gerry Farrell – Dublin City BID
Ailish Smyth – Dublin City Council
Eamonn O'Reilly – Dublin Port
Ronan Sweeney – Excursions Ireland
Sam Johnston – Fáilte Ireland
Kiela Brodigan – Fáilte Ireland
Sabine Sheehan – Old Jameson Distillery

Events Working Group
Peter McKenna – Croke Park
Clyde Carroll – Dublin City BID
Ursula Donnellan – Dublin City Council
Keith McCormack – Fáilte Ireland
Edel Mitchell – Fáilte Ireland
Noeleen McHugh – Fingal County Council
Adrian McLoughlin – Gibson Hotel
Mike Adamson – Live Nation
Justin Green – MCD Promotions

Social Energisers Working Group
Shane Cahill – Barnacles Hostel
Elaine Carroll – Dun Laoghaire Rathdown County Council
Keith McDonald – Extreme Ireland
Kevin Moriarty – Fáilte Ireland
Kiela Brodigan – Fáilte Ireland
Celine Weldon – Guinness Storehouse
Michael McDermott – Le Cool
Paul O'Grady – Mercantile Group
Brendan Flynn – The Church
Vera Stedman – Tourism Ireland

Culturally Curious Working Group
Eugene Garrihy – Dublin Bay Cruises
Sinead Connolly – Dublin City Council
Kevin Kidney – Fáilte Ireland
Orla Carroll – Fáilte Ireland
Eleanor Griffin – Howth is Magic
Irish Heritage Trust – Kevin Baird
Ann Daly – National Museums
Patrick Sutton – Smock Alley Theatre
Brian Twomey – Tourism Ireland
Peter Nash – Tourism Ireland

The Working Group and the strategy development process was facilitated by MCCP-The Planning Agency, Dublin.

APPENDIX A

Tourism to Dublin:

Projections to 2020

by Jim O'Leary, Independent Economist

The Baseline Scenario

The *Baseline* scenario is designed to convey the prospects for international tourism in Dublin over the period to 2020 on a 'no policy change' basis, that is on the basis of things continuing as is in terms of the product offering, branding, marketing, cooperation amongst the various stakeholders and so on. In these circumstances, it is assumed that Dublin would maintain market share and that recent trends in spend per visit would persist.

The UNWTO report *Tourism Towards* 2030 sets out projections of international tourist arrivals by region for successive decades out to 2030. For the purposes of the present exercise, the market in which Dublin competes is taken to be the combined Northern Europe and Western Europe regions as defined by the UNWTO. International tourist arrivals into these regions are projected by the UNWTO to increase at an annual average rate of 2.2% over the period to 2020.

Thus it is assumed in the *Baseline* scenario that total international visits to Dublin will increase by 2.2% per annum between 2012 and 2020. The Baseline projections incorporate some variation around this average by major source market (reflecting recently published OECD forecasts of GDP growth for 2012-2017) as follows: Britain 2.1% per annum; North America 2.7% pa; Germany 1.7% pa; France 2.2% pa; Other Europe 2% pa; rest of the world 3.6% pa.

INTERNATIONAL TOURIST VISITS - BASELINE	2012 (000s)	CHANGE (%, CUM)	2020 (000s)
GB	1089	18	1286
N America	688	24	851
France	272	19	324
Germany	281	14	322
Other Europe	1027	16	1193
Rest of World	281	33	373
TOTAL ABOVE	3638	20	4349
Cruise	86	157	221
TOTAL	3724	23	4570

TABLE 1

On this basis, international tourist visits to Dublin are projected to reach 4.35 million by 2020, compared with 3.64 million in 2012, a cumulative increase of just under 20%. Incidentally, this would still see them fall short of the 4.44 million peak reached in 2007. Table 1 provides corresponding data for each of the main source markets.

In relation to visitors from cruise ships, it has been assumed that the 11.5% average annual growth rate achieved from 2003 to 2013 will be sustained out to 2020. (indeed, 2013 will register 20% growth.) Inclusive of the cruise business, therefore, overseas visitor numbers are projected to reach almost 4.6 million in 2020, a cumulative rise of 23%.

Turning to expenditure, it is common knowledge that the data on spend per visit have been showing a long-term declining trend. This is somewhat masked by the volatility of the corresponding data series on a year-to-year basis. When the year-to-year fluctuations are ironed out using, for example, a three-year moving average, the downward trend is discernible across all source markets (except the Rest of World). This is especially the case when the data are adjusted for inflation as they should properly be (since it is not the amount of money tourists spend that matters from an economic point of view, but the amount of goods and services they purchase).

INTERNATIONAL TOURIST SPENDING - BASELINE	2012 (€MN)	CHANGE (%, CUM)	2020 (€MN)
GB	253	9	275
N America	292	14	334
France	94	1	95
Germany	97	-3	95
Other Europe	355	-1	351
Rest of World	175	33	233
TOTAL ABOVE	1267	9	1383
Cruise	3	157	9
TOTAL	1271	10	1392

TABLE 2

Combining the projections for numbers of visits with the assumptions in relation to spending per visit, results in a projected increase of just 1.1% per annum in total tourism revenue over the period 2012-2020, or a cumulative increase of about 9%. It is important to realise that this is a real increase since the spending numbers are effectively denominated in 2012 prices. It is also worth pointing out that the projected level of spending in 2020 (€1.38bn in 2012 prices) would be significantly lower than the peak level of 2007 (just under €1.5bn in 2012 prices).

With visiting cruise passengers assumed to spend just €40 per visit, the amount spent by this sector of the market is a very small fraction of the total and its inclusion makes little difference to the overall picture.

The Baseline scenario is subject to some methodological weaknesses that are worth mentioning.

The first is that the assumption that Dublin would maintain market share in a no policy change scenario is arguably an optimistic one. If, in the face of continuous innovation across other European city destinations, there were to be no enhancement of the Dublin product, it might be more realistic to propose that Dublin would actually lose market share. Indeed, this is what appears to have occurred over the 2008-2012 period when international bed nights increased at an annual average rate of just 1% for Dublin, compared with average rates of 3.6% and 5% amongst the so-called Second Division and Premier League cities covered in the 2013 edition of the European Cities Marketing Benchmarking Report.

In the same vein, it might be argued that Dublin's position in the Tourism Area Life Cycle is such as to make it vulnerable to decline in the absence of measures designed to regenerate its attractiveness.

On the other hand, it is implicitly assumed that the market in which Dublin competes will increase at the same rate as the overall tourism market in Northern and Western Europe. To the extent that short-break/city break tourism grows faster than tourism generally, this assumption may understate, perhaps to a significant degree, the growth in the market relevant to Dublin.

These methodological weaknesses may be considered to be offsetting. One way of interpreting the Baseline scenario therefore, is that it implicitly builds in a loss of market share by Dublin over the period.

Alternative Scenario I –

Recreating Past Success

The Task Force is proposing a range of initiatives that will result in a rebranding of Dublin, more effective marketing of the city and its environs as a tourist destination, more fruitful collaboration amongst stakeholders, better access to and within the city, and a general enhancement of the tourist experience.

Given available data, there is no reliable methodology for modelling the impact that such a suite of measures would have on tourism numbers and spending. One way of attempting to do so would be to analyse the performance of other cities in the aftermath of such a regime change relative to their performance beforehand. The data required to carry out this type of exercise is not currently to hand.

In its absence, we have approached the question from a different perspective and come up with two scenarios that at least have the merit of being derived from a recorded achievement. The first of these is a scenario based on recreating past success, in particular reproducing the kind of growth rate in visitor numbers that Dublin actually achieved in the eight-year period 1999-2007. Over that period, the total number of international visits to Dublin increased at an annual average rate of 4.7%.

This coincidentally is close to the growth rate (4.2%) projected in the Medium Scenario that featured in the ITIC report 'Capitalising on Dublin's Potential'. Accordingly, in apportioning our average growth rate of 4.7% across the major source markets, we have simply made modest upward adjustments to the corresponding growth rates projected by ITIC. Accordingly, the average annual growth rates projected are as follows: Britain 4%; North America 5%; France, Germany and other mainland Europe 4.5%; rest of the world 7.75%.

This scenario would see total international visits to Dublin reach 5.3 million by 2020, a cumulative increase of 45% on the 2012 outturn and 18% above the previous peak attained in 2007. Further detail is provided in Table 3. In this scenario, cruise passengers are projected to rise by 15% per annum which boosts the cumulative growth rate 2012-2020 to 50% and the total number of visitors in 2020 to close on 5.6 million.

INTERNATIONAL TOURIST VISITS - MEDIUM GROWTH			
	2012	CHANGE	2020
	(€MN)	(%, CUM)	(€MN)
GB	1089	37	1490
N America	688	48	1016
France	272	42	387
Germany	281	42	400
Other Europe	1027	42	1460
Rest of World	281	82	511
TOTAL ABOVE	3638	45	5265
Cruise	86	271	319
TOTAL	3724	50	5584

TABLE 3

As to revenue, it is assumed for the purpose of this scenario that the policy measures proposed by the Task Force would be moderately successful in terms of their impact on spending per visit. Specifically, it is assumed that the long-term decline of spending per visit would be halted. Accordingly, in this scenario, spending per visit is held constant at its 2012 level across all source markets in real terms.

The result is that international tourist spending in Dublin increases by a cumulative 48% over the 2012-2020 period, or at an annual average rate of 5% per annum. This is marginally ahead of the 4.7% rate of increase in the number of visits. The reason is in the mix: we are projecting a stronger growth rate in numbers amongst the higher-spending visitors. Again, despite very strong growth in cruise passenger numbers, their inclusion in the revenue data makes little difference.

These projections envisage total spending by international visitors of just under €1.9bn in 2020. This would be well ahead of the previous 2007 peak. Details by market of origin are set out in Table 4.

INTERNATIONAL TOURIST SPENDING - MEDIUM GROWTH			
	2012	CHANGE	2020
	(€MN)	(%, CUM)	(€MN)
GB	253	37	346
N America	292	48	432
France	94	42	134
Germany	97	42	138
Other Europe	355	42	505
Rest of World	175	82	319
TOTAL ABOVE	1267	48	1874
Cruise	3	271	13
TOTAL	1271	48	1887

TABLE 4

Alternative Scenario II:

Emulating Success Elsewhere

The second scenario of success that we have constructed is based on what has been achieved in other European cities in the recent past. European Cities Marketing most recent Benchmarking Report provides data on the performance of 113 European cities for the period 2008-2012. Amongst the metrics contained in the report are growth rates in international bed nights: such growth rates are estimated for each of the 113 cities that participated in the report.

A wide range of performance is documented: from growth rates of 15%-plus in the case of Turin, Split and Malaga on the one hand to negative rates of more than 5% for cities like Granada, Setubal and Turku. Some of the highest growth rates for the 2008-2012 period were recorded by cities effectively making their debut on the international tourism stage, whose circumstances Dublin could not possibly replicate (e.g. Maribor 14.9%, Novi Sad 10.5%). But impressive growth rates were also recorded by long-established destinations like Berlin (10.8%), Hamburg (10.3%), Barcelona (8.9%), Copenhagen, Milan and Geneva (all 8.3%), demonstrating that cities can defy the more pessimistic predictions of the TALC (Tourism Area Life Cycle) model.

Our second alternative scenario therefore (Emulating Success Elsewhere) assumes that in the period 2012-2020, Dublin can grow tourism numbers at a rate equivalent to that of the top quartile performers in the ECM Benchmarking Report for years 2008 through 2012, that is, cities that achieved annual average growth of 6.8%-plus. The fact that 2008-2012 was a period that featured a severe international recession may be taken as testament to the achievability of such a growth rate by Dublin in what is forecast to be better times, if the programme of initiatives proposed by the Task Force is implemented.

INTERNATIONAL TOURIST VISITS - HIGH GROWTH			
	2012	CHANGE	2020
	(€MN)	(%, CUM)	(€MN)
GB	1089	53	1671
N America	688	88	1291
France	272	63	444
Germany	281	63	459
Other Europe	1027	63	1674
Rest of World	281	130	648
TOTAL ABOVE	3638	70	6187
Cruise	86	330	370
TOTAL	3724	76	6557

TABLE 5

Again, in this scenario, we allow some variation for the different sources markets around the 6.8% average as follows: Britain 5.5%; North America 8.25%; Mainland Europe 6.25%; Rest of World 11%. The details are set out in Table 5. The total number of visits reaches 6.2 million by 2020, a 70% increase on 2012 and a near-40% increase on the peak level reached in 2007.

INTERNATIONAL TOURIST SPENDING - HIGH GROWTH			
	2012	CHANGE	2020
	(€MN)	(%, CUM)	(€MN)
GB	253	66	420
N America	292	103	594
France	94	91	180
Germany	97	91	186
Other Europe	355	91	679
Rest of World	175	130	404
TOTAL ABOVE	1267	94	2463
Cruise	3	330	15
TOTAL	1271	95	2478

TABLE 6

In this scenario, we have allowed that the programme of initiatives proposed by the Task Force will positively impact on spend per visit to the extent that the long-term decline discussed above will not only be halted but significantly reversed. Accordingly, we have assumed that spend per visit from North America and Britain will rise by 1% per annum in real terms to 2020 and that spend per visit from Mainland European visitors will rise by 2%. The net result is that international tourist spending almost doubles between 2012 and 2020, rising by a cumulative 94% to just under €2.5bn. This represents an annual average rate of 8.6% which is 1.8% points faster than the projected rise in numbers. It is worth noting that about one-third of this differential (0.6% points) is due to the shift towards higher-spending visitors noted earlier.

Implications for Hotel Capacity

Hotel bed capacity in Dublin is estimated at 15.7 million on an annual basis in 2012. Bed-nights sold in 2012 are estimated at 7.6 million, giving an average occupancy rate of 48% over the course of the year. It is estimated that just under 4.2 million, or 55% of the bed-nights sold, were accounted for by Irish guests (including those from Northern Ireland) and the balance of 3.4 million (45%) by overseas guests.

In drawing out the implications for accommodation demand of the projections detailed above, it is necessary to scope out what domestic demand might be. For this purpose, it is assumed that domestic demand for hotel accommodation in Dublin will grow in line with the volume of consumer spending, which is projected to increase at an annual average rate of 2% in the Recovery Scenario developed by the ESRI in its in latest Medium-Term Review.

It is also assumed for the purposes of the present exercise that domestic demand for hotel accommodation will grow at the same rate across the three scenarios for Dublin tourism that are detailed above i.e. that domestic tourism will not respond to the initiatives proposed by the Task Force. This may well be a conservative assumption.

The projections for hotel accommodation demand and implications for capacity utilisation under each of the three scenarios for Dublin tourism are summarised in Table 7. In the Baseline, bed-nights sold are projected to rise to 9 million in 2020; in the two alternative scenarios bed-nights sold increase to almost 9.9 million and 10.7 million respectively. These figures amount to the equivalent of 57%, 63% and 68% of 2012 capacity, on an annual basis.

HOTEL BED-NIGHT DEMAND IN 2020				
(000s)	2012	BASELINE	ALT I	ALT II
Overseas	3421	4072	4940	5791
Domestic	4182	4900	4900	4900
Total	7603	8971	9840	10690
(% of capacity)				
Annual	48.3	57.0	62.6	68.0
July	60.4	71.3	78.2	85.0

TABLE 7

It is important to realise that these capacity utilisation rates are calculated on an annual average basis. If the seasonal pattern of occupancy evident in 2012 were to be replicated in 2020 there would of course be considerable variation around the annual averages. In the peak season month of July, for example, the occupancy rates (again assuming 2012 capacity) would average 71% under the Baseline, 78% under the medium growth scenario and 85% under the high growth scenario.

Economic Impact

(i) Employment

The three scenarios developed above: the Baseline; the Medium Growth and the Higher Growth alternatives see expenditure by overseas tourists in Dublin increasing in real terms at annual average rates of 1.1%, 5.0% and 8.7%.
It is reasonable to assume that output of the Dublin tourism industry attributable to overseas tourism activity would increase at similar rates.

However, it is also reasonable to assume that the resultant growth in employment would be somewhat slower on account of rising labour productivity. Labour productivity is projected to increase at an annual average rate of 1% in the period out to 2020. This is in line with the corresponding assumption made by the ESRI in the Recovery Scenario of its recent Medium-Term Review. The implication, as summarised in Table 8, is that the annual rate of growth in employment attributable to overseas tourism in Dublin would be trivial in the Baseline scenario (at just 0.1%), but would be very substantial in each of the alternative scenarios.

In the medium growth scenario employment growth is projected at 4% per annum, or a cumulative 36% by 2020; in the high growth scenario, employment grows by 7.6% per annum or a cumulative 80% by 2020.

ECONOMIC IMPACT			
	BASELINE	MEDIUM GROWTH	HIGH GROWTH
Growth in overseas spending (% pa)	1.1	5.0	8.7
Growth in employment* (% pa)	0.1	4.0	7.6
Growth in employment* (000s, cumulative)	Negligible	8,600	19,200
* Employment in Dublin attributable to overseas tourism			

TABLE 8

Accordingly, it is estimated that employment attributable to overseas tourism in Dublin in 2020 would be boosted to the tune of almost 9,000 under the medium-growth scenario and over 19,000 under the high growth scenario.

(ii) Tax revenue

Failte Ireland estimate that out-of-state tourism spending of €3.2bn in 2012 (inclusive of Northern Ireland) generated €1bn of tax revenue for the Exchequer. On this basis, the €1.27bn spent by overseas visitors to Dublin in 2012 would have generated almost €400m in tax receipts.

Applying the same ratio to the three sets of projections for 2020 yields tax revenue from overseas visitors to Dublin of: €435m, €590m and €775m for the Baseline, Medium Growth and High Growth scenarios respectively. In other words, by 2020 the Medium Growth scenario is yielding €155m more per annum and the High Growth scenario €340m more per annum in tax revenue to the Exchequer than the no-policy change scenario.

These figures are denominated in terms of 2012 prices (i.e. in real terms). Assuming a real interest rate of 2%, we can convert the flows of tax receipts projected for the period to 2020 into net present value (NPV) terms. The results of these calculations are interesting. The NPV of the difference between the flow of tax revenues projected under the Medium Growth scenario and the baseline amounts to €0.6bn; the corresponding figure in respect of the High Growth scenario is €1.3b.

B1

APPENDIX B1

Grow Dublin Taskforce

Sector Plan:

Social Energisers

Introduction

Dublin is Ireland's leading tourist destination and plays a pivotal role in the experience of most visitors to the island of Ireland. In an era favouring short and more frequent breaks, Dublin is also well placed to take advantage of the trend towards city breaks. Dublin is currently experiencing a recovery in its tourism fortunes unlike any other Irish tourist destination. Yet there are grounds for believing that Dublin could do much better, given its portfolio of attractions and events, its supporting infrastructure, and its multiple points of access, provided it puts in place a more coherent and appropriately funded strategy. Recent consumer research conducted within the key target markets indicates that Dublin's true potential is far from tapped.

Fáilte Ireland, as the National Tourism Development Authority, has a responsibility to progress such initiatives. It is the Authority's strongly held belief that given the very multi-faceted nature of the tourism offering and its extensive interdependencies across the Dublin economy, this task is best progressed in a collaborative manner.

To that end individuals and executives from across the public and private sectors with an interest and stake in this topic formed the Grow Dublin Taskforce. The Taskforce is led by a Steering Group which is assisted in its deliberations by supporting Working Groups comprised of executives of the various supporting agencies and which expand and contract to include representation from the wider Dublin industry throughout the process

The Dublin proposition

The agreed *Dublin proposition* that has been developed following extensive stakeholder and consumer consultation is:

> **Dublin is *the* vibrant capital city bursting with a variety of surprising experiences – where city living thrives side by side with a natural outdoors.**

About the *Social Energisers* sub-working group

Social Energisers is one of five sub-working groups that have been established, each focusing on a different sector believed to have potential for growth.

Executive summary

Dublin is ***the*** vibrant capital city with huge levels of social energy. For young people seeking a fun destination, it offers an exceptional mix of exciting night life and action-packed days, a wide range of out-of-the ordinary adventures to awaken the senses.

For these reasons, it is particularly attractive to tourists in the *Social Energisers* sector. *Social Energisers* tend to be young couples /adult groups looking for excitement, new experiences, and fun, social holidays in somewhere new and different. They really like having a laugh and sharing their adventures with their friends. They love new experiences and exploring new places – the more out-of-the-ordinary, the more exciting, the better. It's great if there's a lot to do in a relatively small area, so they don't have to plan too far ahead. They are up for being spontaneous, as this often leads to more fun and laughter, and a really great break.

Social Energisers want to be at the heart of it all – wherever is social, wherever it's happening. But their definition of a good time is wider than just partying. They're also looking for interesting events, fun activities, gigs. Always ready to try new things – exploring the city by day for its vibrancy and unique atmosphere, as well as enjoying the nightlife – they will go for something unusual as long as it has the 'wow' factor they're looking for. They're hungry for experience, so they're likely to be packing everything in.

The challenge we face is to continually renew and develop how we present the energy that Dublin has for this sector. We need to put in place programmes that can give Social Energisers opportunities to soak up the atmosphere of Dublin in ways that are authentic and fun, both in the daytime and at night.

The current report sets out some of the programmes that will help Dublin to realise the potential in the *Social Energisers* sector and to contribute to the three GDT objectives.

Presenting Dublin coherently

In order to ensure that the development of Dublin as a destination is coherently presented, all of the programme ideas and activities advanced must take into account the core elements of the **DUBLIN PROPOSITION.** This means ensuring that Dublin's core brand values are reflected in every sector plan, programme and project; these include:

- **Vibrancy** – is it dynamic, contemporary; does it add a sense of self-perpetuating energy?
- **Bursting with a variety of experiences** – does it show the variety of compelling experiences that are easily accessible?
- **Surprising** – does it surprise? Does it contain new experiences and convey existing experiences in a novel way?
- **City living thriving side by side with the natural outdoors** – does it bring the city living that thrives side by side with the natural outdoors to life in an engaging way?

Activity to date

Stakeholders met on several occasions in September 2013, setting themselves the tasks of identifying the following in relation to the *Social Energisers* sector:

- The target audience for suggested programmes, projects and actions
- The barriers that might inhibit growth, and the opportunities or needs that might overcome them
- The programme areas within which projects and actions might be focused
- Some detail of the projects and actions that might be appropriate and feasible, within each of the defined programme areas.

Definitions and participants

Definitions

Programme
The management of several related projects in a 'programme'. Examples of such programmes would be a city-wide celebration where several work streams need to work separately but are critical to the delivery of the platform. These would be managed under the programme to ensure that the dependencies are being considered – including time constraints, budgets and deliverables.

Project
A short-term or temporary piece of work with defined start and finish, undertaken to meet unique goals, objectives and challenges that are not considered 'business as usual'.

Action/task
Outcome-based activity assigned to one or several people that ensures that a small scale task (such as sending an update etc.) is completed in a defined period of time.

Participants
The following people contributed to the work of the Social Energisers sub-working group.

Kevin Moriarty	Fáilte Ireland
Kiela Brodigan	Fáilte Ireland
Mark Rowlette	Fáilte Ireland
Michael McDermott	Le Cool
Celine Weldon	Guinness Storehouse
Paul O'Grady	Mercantile Group
Brendan Flynn	The Church
Lidija Radacic	Barnacles Hostel
Keith McDonald	Extreme Ireland
Elaine Carroll	Dún Laoghaire Rathdown Co. Council
Vera Stedman	Tourism Ireland

Barriers and opportunities

A number of barriers to growth were identified in the Social Energiser sector, and in many cases, the GDT strategy will advance opportunities to address these.

- **Information:** It was felt that there is both a shortage of information for tourists and barriers to accessing it. Information sources tend to be fragmented and inconsistent and it can be difficult not only for visitors, but also for locals and even for those working in the industry to get easy access to what they need to know. Itinerary planning can be difficult as is finding experiences well suited to one's particular interests.
- **Transport:** There are shortcomings in the transport infrastructure in several areas: access to the city from the airport; movement around the city; and access from the city to the environs. This may be another example of the information deficit, in that guidance as to how to make use of the infrastructure can be hard to access.
- **Support:** Specifically for experience developers, for whom support and information is also fragmented. There is no obvious 'go-to' source of help on what processes there are and how to overcome obstacles that event organisers often face.
- **Engagement:** Specifically of Dubliners, who currently don't fully appreciate their role in welcoming visitors and enthusing them with the value of what Dublin has to offer. This includes business people who might not necessarily see themselves as being in the tourism area, such as the small retailer, the 'corner shop'.

- **Public bodies:** In some cases they are not always good at putting themselves in the shoes of the visitor, and can put bureaucratic obstacles in the way both of the experience developers and the tourists. There is a tendency to keep in mind the needs of Dubliners only when developing amenities.
- **Experiences:** These can appear to lack vibrancy for the Social Energiser and are insufficiently integrated, which might be addressed for example by forming them into itineraries. Additionally the appropriate experiences that do exist are not always fully appreciated – quality food is an example of this. This can be addressed by how the experiences are packaged.
- **Collaboration:** Stakeholder organisations such as experience developers and operators have traditionally operated in isolation from one another, with insufficient communication between them, and they have not collaborated enough on approaches to gaining funding.
- **Culture:** This broad area, which includes history, architecture, museums, galleries, music, theatre and literature, was felt to have been under-emphasised in far in relation to Social Energisers. The way these are presented needs to be more vibrant and alive to the interests of Social Energisers.
- **Not enough known about Dublin in target markets:** Many people in the potential target markets just don't know enough about Dublin and what it has to offer, and for that reason they have not even considered it when they are deciding what short break destination to choose.

Audience/partners and target market

Audience/partners

The audience for the Social Energisers sector plan includes:

- **Local Authorities.** The four Dublin local authorities are critical facilitators and partners in tourism marketing. In addition, there is some sense that local authorities in cities abroad might be worth addressing, for example in the case of cities with which Dublin is twinned, or might become twinned, with this being a potential route by which to engage with visitors.
- **Development agencies.** It may be possible to make use of the extremely knowledgeable and experienced networks that IDA Ireland and Enterprise Ireland have in a wide range of geographical markets.
- **Experience developers.** In order to ensure both efficiency and effectiveness of the marketing process, it will be necessary to get buy-in from those who have ownership of the diverse experiences offered to the visitor.
- **Multinationals.** Many multinational companies with a presence in Dublin are either headquartered, or have a significant presence, in geographical markets which would be targets for the GDT, and that value could be generated by engaging with these companies and their staff to promote Dublin. The workforce in many of these companies falls into the Social Energiser category and provide links to key networks of families and friends who will visit Dublin because of to their links with business here. The Social Energiser experiences must be made obvious to them to enhance their Dublin experience so that they will become advocates for it within their network and will draw their networks to Dublin to experience the culture.
- **Industry stakeholders.** In addition to experience developers, there are many other industry stakeholders who stand to benefit from effective tourism marketing and who have an interest in ensuring that it is fine-tuned to best effect.

Target market

The target market for the Social Energisers sector includes:

- **Social Energisers** in foreign markets. These are of course the prime target market for this sub-group. They are defined as young (18-34) people without children, who typically travel either as couples or as groups. They are looking for fun and laughter, spontaneity, buzz and excitement and out of the ordinary experiences.
- **Dubliners.** The importance of Dubliners – in this case, specifically those in the Social Energiser sector – was recognised for two reasons: first, in so far as their presence and activity in the city and its environs plays a significant part in creating the vibrancy which is sought by visitors; and second as an important market in their own right, who both serve as a useful test-bed for new experiences, and can become valuable ambassadors for Dublin if these experiences are positive.

Programmes

The Social Energisers sub-group proposed two main programmes:

- Building on the *Dublin Now* initiative; and
- The establishment of an Experience Development Framework.

Both of these programmes reach across the leisure sectors, covering both the Culturally Curious and Social Energisers. The Experience Development Framework is elaborated in more detail in the Culturally Curious sector report.

Programme 1: *Dublin Now Plus*

The Dublin Now initiative is a focused approach to reposition Dublin in the eyes of British tourists and to develop Dublin as a go-to destination for Social Energisers. There is huge potential for growing visitor numbers in this area. Dublin is already regarded as being very good at delivering exciting night-time experiences – what's needed now are better ways of communicating and selling the idea of a vibrant, rejuvenated and energised Dublin and a wider range of activities in the daytime as well as at night time.

Project 1.1: Extend Dublin Now into other markets

The Dublin Now initiative is focused particularly on the British Social Energisers market. The idea with this project is to:

- Assess and consider the success of Dublin Now in the British market; and learning from it to extend the concepts into the French, German and USA markets.
- Develop strategies to ensure that Dublin Now can work with Dublin's own Social Energisers – so that they can draw in tourists attracted by the proposition.

Likely outputs from this project are new and innovative approaches to repositioning Dublin, along the lines of:

- Developing and theming experiences to target Social Energisers more effectively.
- New ways of marketing to Social Energisers, with a particular emphasis on digital media.
- A brand destination marketing project.
- Creating a buzz for Social Energisers and for Dubliners themselves.
- Engagement with and networking amongst relevant and peer influencer Dublin Industry.

Project 1.2: Develop a content strategy for Social Energisers

Social energisers are less likely to get all their information about a likely destination from 'official' sources. They rely heavily on informal networks of fast-changing information, on what's 'happening' now.

Energised content

The challenge to develop a content strategy for Social Energisers is to find some way of directing these positive, informal channels, so that it becomes easier for Social Energisers to find out what's going on, and where, and we need to ensure that such channels reflect the vibrancy of the *Dublin proposition*. Such a strategy must present content that is:

- Clearly directed at the Social Energisers market and distinguished from other forms of tourist information.
- User-generated and 'viral' – the dissemination and distribution channels must be authentic and reflect the immediate experiences of key influencers.
- 'Live' and interactive – it must relate to what's happening *now.*
- Tapped in to what Dublin's own Social Energisers do, clearly authentic and not a tourist product in the normal sense.

In terms of distribution and dissemination, content needs to be 'harvested' from those who generate it and in ways that make it easier to target the precise audiences who need it. Various social media and viral campaigns are certain to feature at an 'underground' level. These, however, will probably be complemented by more traditional B2B and B2C campaigns, and potentially by a physical drop-in hub. This physical hub could take the form of a dedicated space, or more likely several 'Social Energiser hubs' such as cafes that are empowered with information to disseminate. It is crucial that this hub is authentic and not a typical 'tourist office'.

Project 1.3: Develop social innovation

In the Social Energisers space, innovation and entrepreneurship are very likely to be ground-up happenings, 'pop-up' outlets, installations or events. They happen overnight and tap into very fast-moving trends and subcultures. They're over before mainstream business even becomes aware of them, and their innovators have moved on.

Develop a social entrepreneurship laboratory

The challenge here is to find ways of leveraging the entrepreneurial vigour of those who develop and mediate the experiences that Social Energisers gravitate towards. This needs to happen in ways that are sustainable and iterative.

Young entrepreneurs in this space know what they want to do, and they generally have a good idea of how to go about it – how to influence the influencers, how to permeate social media, how to get talked about in the right places. But they don't always have experience at translating those disruptive and creative skills into the more pedestrian achievement of longer-term business success and negotiating the process and regulations that are necessary to creating successful events. And they may welcome public support for their business ideas.

The main idea here is to find ways that young energised entrepreneurs can be guided or mentored in the skills that are needed to build sustainable businesses, but without compromising their enthusiasm and sense of adventure. There are likely to be opportunities across the range of sectors:

- Street entertainment, happenings, 'funky' events.
- Cafés, restaurants and other food outlets that tap into Social Energiser interests.
- Music and youth culture promotions.

Project 1.4: Set up partner marketing network

The perception of Dublin internationally is a complex and composite one that reflects the city/region's resources, history and contemporary projection of itself. Among the elements that make up how Dublin is perceived among the Social Energiser market is the fact that Dublin is home to many companies who are brand leaders in their own right, as well as hi-tech IT companies with a global reach.

Dublin has had unique success in attracting some of the world's most successful companies to set up their European headquarters here. The cachet of companies such as Microsoft, Google, Facebook, Dropbox and Twitter (to name just a few) is considerable, and is particularly strong among the Social Energiser demographic. These are the big cool IT companies who already play such a central role in how young people (in particular) socialise and get their information about what's happening in the world. These companies are also a key draw for global Social Energisers who work here and draw in family and friends as tourists. It is crucial to reach out to these people as a key advocate group. They must experience the best Dublin has to offer Social Energisers and they will in turn contribute to drawing in tourists.

Alongside these, Dublin has is the home of world brands such as Guinness and Jameson; and it also has wide acclaim as a hub for music, film and popular culture.

The main idea here is to develop structures that can help to make the most of these global assets – through joint initiatives in marketing, in the arts and in event management. Any such initiatives should involve the senior management of the IT companies, and should bring benefits both to Dublin and to corporate members of such a partner network.

Programme 2: The Experience Development Framework

Bringing Dublin to life

The Experience Development Framework is the process whereby Dublin's experiences are brought to life in ways that can engage, excite and surprise our segments. The framework must stretch across all the quarters (urban and extraurban) and must cover the range of 'things to see' and 'things to do' and it must also be woven in or layered with food experiences, entertainment, music and artistic/cultural events.

Fáilte Ireland is about to publish its new corporate strategy 2013 – 2016, under which the organisation's developmental priorities will, from this point forward, be guided by a national Experience Development Framework. A dedicated Experience Development team has recently been assigned to devise this national framework, which will then be appropriately applied to all key strategic propositions and projects, both those currently in train and those planned.

The Experience Development Framework must deal with the visitor experience from the moment they arrive until they depart, and it must have specific interventions aimed at key market segments as required.

Project 2.1

Continue to build on the experience development success from the Dublin Now pilot programme which enables and empowers Dublin's Industry and peer influencer group for Social Energisers to create and develop targeted experiences.

B²

APPENDIX B2

Grow Dublin Taskforce

Sector Plan:

Culturally Curious

Introduction

Dublin is Ireland's leading tourist destination and plays a pivotal role in the experience of most visitors to the island of Ireland. In an era favouring short and more frequent breaks, Dublin is also well placed to take advantage of the trend towards city breaks. Dublin is currently experiencing a recovery in its tourism fortunes unlike any other Irish tourist destination. Yet there are grounds for believing that Dublin could do much better, given its portfolio of attractions and events, its supporting infrastructure, and its multiple points of access, provided it puts in place a more coherent and appropriately funded strategy. Recent consumer research conducted within the key target markets indicates that Dublin's true potential is far from tapped.

Fáilte Ireland, as the National Tourism Development Authority, has a responsibility to progress such initiatives. It is the Authority's strongly held belief that given the very multi-faceted nature of the tourism offering and its extensive interdependencies across the Dublin economy, this task is best progressed in a collaborative manner.

To that end individuals and executives from across the public and private sectors with an interest and stake in this topic formed the Grow Dublin Taskforce. The Taskforce is led by a Steering Group which is assisted in its deliberations by supporting Working Groups comprised of executives of the various supporting agencies and which expand and contract to include representation from the wider Dublin industry throughout the process.

The Dublin proposition

The agreed Dublin proposition that has been developed following extensive stakeholder and consumer consultation is:

Dublin is *the* vibrant capital city bursting with a variety of surprising experiences – where city living thrives side by side with a natural outdoors.

About the *Culturally Curious* sub-working group

Culturally Curious is one of five sub-working groups that have been established, each focusing on a different sector identified as having potential for growth.

Executive summary

Dublin is *the* vibrant capital city with a very rich cultural and artistic heritage that is both deep and broad. It also has the sea, the mountains, rivers, canals, parkland and an easily accessible rural hinterland – offering the *Culturally Curious* an unrivalled mix of the cultural and the natural. For these reasons, it is particularly attractive to tourists in the *Culturally Curious segment*, and the challenge we face is to continually develop and renew how we present and animate our cultural and natural richness.

To meet the potential in this segment, we need to work together to put in place programmes that can enable Dublin to engage with tourists at deeper levels and provide rich and life enhancing experiences. We need to motivate the segment more vigorously and help to overcome the image of Dublin as a place with not much to do. The current plan sets out some of the programmes that will help Dublin to realise the potential for the *Culturally Curious segment.* It is a key output from a process of engagement with stakeholders at a sub-working group level.

The *Culturally Curious* are mostly older couples with time to spend. They are independent 'active sightseers' looking to explore new places and broaden their minds. They want to 'do a place', both its culture and the beauty of its landscape. If they had children, these have grown up and left home. They are out to broaden their mind and expand their experience by exploring new landscapes, history and culture. They are curious about everything and are delighted to discover the world for themselves once again.

They're interested in all that a place has to offer and they want it to be authentic. They won't choose a brand or visit a place just to follow the herd. This is their own exploration and they really want to cover everything – to 'do' a place. The *Culturally Curious* love to discover history and always find ways to get real insight. Independent, 'active' sightseers, they are looking to encounter new places and experiences that are out of the ordinary. The *Culturally Curious* like to feel that they have not only broadened their minds, but also immersed themselves in a place, giving their senses a holiday too – the sights, the sounds, the smells, the tastes. They enjoy connecting with nature and getting off the beaten track. They like people to show an interest and educate them – to feel they've connected. They really appreciate personal guides.

Presenting Dublin coherently

In order to ensure that the development of Dublin as a destination is coherently presented, all of the programme ideas and activities advanced must take into account the core elements of the ***Dublin proposition.*** This means ensuring that Dublin's core brand values are reflected in every sector plan, programme and project; these include:

- Vibrancy – is it dynamic, contemporary; does it add a sense of self-perpetuating energy?
- Bursting with a variety of experiences – does it show the variety of compelling experiences that are easily accessible?
- Surprising – does it surprise? Does it contain new experiences and convey existing experiences in a novel way?
- City living thriving side by side with the natural outdoors – does it bring the city living that thrives side by side with the natural outdoors to life in an engaging and accessible way?

Activity to date

Stakeholders met on 3 occasions in September 2013, setting themselves the tasks of identifying the following in relation to the *Culturally Curious* sector:

- The target audience for suggested programmes, projects and actions
- The barriers that might inhibit growth, and the opportunities or needs that might overcome them
- The programme areas within which projects and actions might be focused
- Some detail of the projects and actions that might be appropriate and feasible, within each of the defined programme areas.

Definitions and participants

Definitions

Programme
The management of several related projects in a 'programme'. Examples of such programmes would be a city-wide celebration where several work streams need to work separately but are critical to the delivery of the platform. These would be managed under the programme to ensure that the dependencies are being considered – including time constraints, budgets and deliverables.

Project
A short-term or temporary piece of work with defined start and finish, undertaken to meet unique goals, objectives and challenges that are not considered 'business as usual'.

Action/task
Outcome-based activity assigned to one or several people that ensures that a small scale task (such as sending an update etc.) is completed in a defined period of time.

Participants
The following people contributed to the work of the Culturally Curious sub-working group.

Kevin Baird	Irish Heritage Trust
Orla Carroll	Fáilte Ireland
Sinead Connolly	Dublin City Council
Ann Daly	National Museum of Ireland
Eugene Garrihy	Dublin Bay Cruises
Eleanor Griffin	Howth is Magic
Kevin Kidney	Fáilte Ireland
Peter Nash	Tourism Ireland
Patrick Sutton	Smock Alley Theatre
Brian Twomey	Tourism Ireland

Barriers and opportunities

Barriers
The following barriers were identified:

- What is the sell? It's not clear that the industry knows what it is selling. There is a perceived lack of coherence in the way Dublin is branded, and there is no clear marketing 'hook'.
- Dublin is perceived by consumers as rather stuffy, 'dusty' and old fashioned and not vibrant. The real personality of Dublin as a vibrant city is not well presented.
- There's a lack of knowledge about what Dublin has to offer, and a corresponding difficulty in providing/accessing information. Too much of Dublin's personality is 'hidden'; we assume too much pre-knowledge and we don't tell the story in an engaging and motivating way.

Opportunities
The perceived barriers point to what needs to be done and the opportunities that currently exist; these include opportunities/needs to:

- Package the offerings that we have in ways that leverage the variety of experience that Dublin has to offer in line with the Culturally Curious needs and motivations – cultural offerings (literature, history, art) and events combined with the natural environment, food, entertainment, sport and so on
- Use our strong cultural assets more imaginatively and engagingly– especially literary and artistic heritage

- Uncover and personalise the hidden stories of Dublin, to make what is implicit in the Dublin narrative both explicit and clear to audiences who come to the city with very little knowledge of Dublin's layered history and heritage
- Develop more coherent 'pathways' for tourists that can bring to life the depth and breadth of Dublin's offering
- Involve local communities of Dubliners more centrally in personalising and mediating the experience of the city to visitors.

Audience/partners and target market

Audience/partners

The audience for the Culturally Curious sector plan includes:

- Local Authorities. The four Dublin local authorities are critical facilitators and partners in tourism marketing. In addition, there is some sense that local authorities in cities abroad might be worth addressing, for example in the case of cities with which Dublin is twinned, or might become twinned, with this being a potential route by which to engage with visitors.
- Development Agencies. It may be possible to make use of the extremely knowledgeable and experienced networks that IDA Ireland and Enterprise Ireland have in a wide range of geographical markets.
- Statutory bodies. Including Fáilte Ireland, Tourism Ireland and Bord Bia.
- International (and local) media and influencers of consideration – content creators, bloggers and so on.
- Industry stakeholders. Private and public sector providers of products and services who stand to benefit from effective tourism marketing and who have an interest in ensuring that it is fine-tuned to best effect.

Target market

The target market for the Culturally Curious sector includes:

- Potential tourists who fall into the Culturally Curious segment.
- The people of Dublin, who have the capacity to act as ambassadors for their city and region.

Programmes

The Culturally Curious sub-group proposed a number of programmes centred on developing and communicating themes which can bring Dublin to life in a way that is appealing to this segment. These themes are aligned with the needs and motivations of the Culturally Curious segment and it is proposed that they are brought to life through two main programmes which complement each other.

1. An immediate segment specific action plan to deliver growth to Dublin - *Dublin Now Plus*
2. A longer term developmental programme – Experience Development, which aims to build on what we have and improve the experience of a given proposition

Programme 1: *Dublin Now Plus* for Culturally Curious

The *Dublin Now* project is a pilot action plan for delivering incremental growth to Dublin City and Region. Using the segmentation model identified via the *GB Path to Growth* report the current pilot project's objective is to reposition Dublin in the minds of Social Energisers in Great Britain in order to activate and convert this important target segment in our largest single source market. The plan is centred on three important work streams, developed to overcome the barriers to growth:

- Industry Engagement
- Content creation, curation and distribution with a focus on digital media and platforms
- Targeted activation in the marketplace.

An interim review highlighted the success of the approach. Taking the learnings from the pilot the 'Dublin Now' approach will be built upon to target the Culturally Curious segment. The Dublin Now project was developed to deliver on the new Dublin proposition, developed to motivate our segments based on their needs and differentiate Dublin from its competitive set. In the same way the proposition will be used as a strategic filter for the Culturally Curious.

Like the Dublin Now pilot project which focused solely on Social Energisers in Great Britain, a market by market approach, or Dublin Now Plus, will be used for targeting the Culturally Curious segment.

Project 1.1: Industry Engagement

Industry engagement is at the centre of the Dublin Now approach. It comprises:

- Leveraging consumer insights to support and empower Dublin Industry to activate digital channels to attract international visitors.
- Networking events to encourage cross promotion, packaging and sharing of learnings and ideas
- Ensuring and enabling consistent segment specific messaging about Dublin

Project 1.2: Content creation, curation and distribution

Those in the Culturally Curious segment are well educated and seek to discover authentic experiences. They are likely to do considerable research in advance of coming to a destination. The challenge has always been interpreting and activating the proposition and presenting what we have in a way which is meaningful. There is a need to create and curate culturally relevant content that will ultimately engage, inspire and motivate our target segment to travel to Dublin and enhance the in-holiday experience. Content will reflect chosen themes developed to bring Dublin to life and showcase the experiences that are engaging and motivating. Targeted, broad spectrum business to consumer and business to business distribution channels will ensure the right message is getting to the right person at the right time.

Project 1.3: Activation in the market place

There is a role for traditional B2B and B2C marketing and communications campaigns including but not limited to online, offline and print media. This is a requirement that applies to all sectors and is covered in more detail in the main document.

Project 1.4: Identification and development of task leaders in Dublin

Dublin needs its own local champions to proclaim its tourist offering more clearly and enthusiastically. And we need to find innovative and imaginative ways of identifying who these might be. To do this we need to investigate and develop communications strategies that will meet these requirements. Among the initial suggestions of how this might work are:

- A Dublin-region TV programme similar to *Nationwide* that would get an on-the-ground, Dublin theming development story to a wider audience in Dublin itself.
- A Dublin-based social entrepreneurship TV programme based on city/region experience theme development, and focused primarily on energising the Dublin story through a vibrant mix of events, activities and resources. There is considerable scope here for involving the community and voluntary sector.

Programme 2: The Experience Development Framework

The breadth and depth of Dublin's offering are beyond question. However, there is now a compelling argument for pulling together the diversity of offerings, utilising a strong process known as an experience development framework. This framework will bring together personal and individual experiences that tourists might have in Dublin as a whole, and more particularly in its different quarters (urban and extra-urban) in a way that is meaningful and motivating.

The framework will stretch across all the quarters (urban and extra-urban) and will cover the range of 'things to see' and 'things to do' and it will also be woven in or layered with food experiences, entertainment, music and artistic/cultural events.

At an enabling level, it will explore ways in which Dubliners can engage more with their city/region and mediate it more effectively to tourists. At its most basic, the framework for "Bringing Dublin to Life" is simply a list of the components that make up a great Irish tourism experience brought together in different ways which are motivating to Culturally Curious. Having a framework allows us to bring consistency to the way in which we go about matching the needs of our target visitors with what is currently available, and to give providers the insights to refine and improve their offerings.

This will provide a holistic 'diagnosis' of visitor experience development needs for Dublin's proposition, informed by available market intelligence and work done to date in the relevant geographical or thematic area. In the case of Dublin, all relevant work executed to date by Public and/or Private entities will be incorporated into the Experience Development plan.

The framework of experiences will also give Dubliners a new way of seeing their city and imagining its potential. It will provide them with a new way of mediating and interpreting the city for visitors.

There will be three main phases in the development of the Framework to Bring Dublin to Life.

Phase 1: Define the themes in line with consumer segmentation motivations and utilising the proposition as the strategic filter e.g. Culture, Creative, Literary, Music, Viking, Medieval, Maritime, Coastal, Creative, Dublin's Villages, Dublin Outdoors (Dublin Mountain Partnership, Outdoor Tourism Project)
Populate with already existing workstreams e.g. DubLine, Independence Trail, Merrion Square, Cultural Quarter, No.14 Henrietta St., Victorian Fruit Market

Phase 2: Define the projects that deliver on the themes (and therefore the proposition) some potential projects are already worked up and outlined below.

Phase 3: Resources and timeframes.

Ideas underpinning the Framework

Examples of ideas and themes generated by the sub-group to be incorporated into the Framework and built upon are:

Project 1.1: Dublin as a city of enlivened themes/trails/areas

The development of integrated or themed 'pathways' has the potential to bring together the range of cultural, social, natural and activity experiences that visitors have in Dublin, and to do so on the visitors' terms. Initiatives in this space might also include 'pop-up' events or festivals offering a deeper themed engagement with aspects of Dublin life and culture.

The likely outcomes of such a project will be multiple small-scale activities carried out by individuals, groups and companies that taken together will add up to a substantial mediation/animation initiative. The big idea here is that collectively such projects will be underpinned by collaboration within and across quarters, and between different interest groups.

It is expected that the pathways will be various and will reflect the culture, heritage, aesthetics, environment and social infrastructure of the different urban and extraurban quarters. They include the following, which are outlined in some detail below:

- Dublin: culture/city of quarters
- Dublin: an active and exciting natural environment
- The Dublin food trail

Dublin: culture/a city of quarters

Culture and artistic heritage are at the heart of what Dublin has to offer. A project centred on culture needs to drive reappraisal of Dublin as a vibrant city of culture and it needs to encompass the richness and variety of Dublin's contribution in the fields of theatre, literature, music, storytelling, dance, art and design, and architecture in a variety of ways. These should span the city centre and the outer Dublin region so that the consumer can experience the full proposition.

- **Heritage:** leveraging the artistic and literary heritage of Joyce, O'Casey, Beckett, Behan, Plunkett et al. in imaginative new ways that are respectful of the work and seek to emphasise their connectedness to the city and region. This should build upon the considerable work that Dublin City Council has done in this area and on Dublin's status as a UNESCO City of Literature
- **Depth and breadth:** emphasising the depth and breadth of Dublin's language, including the strong vernacular wit and banter, the joy and enthusiasm with which Dubliners use language, and the rich heritage of 'song and story'; it needs to connect the 'high' literary world with the life and language of the city. It needs to connect the literature which Dublin is famous for, with the work of contemporary writers and artists.
- **Lived experience:** developing ways of opening up the lived experience of Dubliners in language that is authentic and compelling – the example of the words scribbled on the walls of Kilmainham Gaol are an idea of how this might happen.

- **Animation and activation:** finding ways of animating the city across its different quarters – bringing the cultural richness to life in new, interesting and imaginative ways.
- **Scale:** finding ways of scaling up events, festivals and other gatherings so that they can become more attractive to a wider audience of the Culturally Curious.
- ***A Literary Ireland Visitor Experience* (ALIVE):** a modern, interactive, experiential Dublin city-centre attraction celebrating Ireland's literary imagination. It will interpret Ireland's writers and the stories they have created in a compelling, visually-stimulating way, and will appeal to overseas visitors and the domestic market.
- **City and region quarters:** considering ways of connecting Dublin's culture to the geographical and historical quarters of the city and region. Like Berlin and London, Dublin is very much a city of districts, villages and suburbs that each has its own history, identity and points of interest. These include:
    - The six core quarters identified in the Culture Night literature
    - Maritime villages/towns such as Howth/Sutton, Malahide, Skerries, Blackrock, Dún Laoghaire, Dalkey and Killiney
    - City villages such as Markets Area, Liberties, Stoneybatter, Portobello, Kilmainham/Inchicore and so on
    - Inner suburbs such as Rathmines, Rathgar, Sandymount, Fairview, Glasnevin, Drumcondra, Ballsbridge, and so on
    - Vibrant residential hubs such as Swords, Finglas, Blanchardstown, Clondalkin, Tallaght, Rathfarnham, Dundrum, and so on.

At the heart of all this initiative is the strong sense that Dublin's cultural and artistic heritage amounts to more than the sum of its parts, that the different areas of artistic endeavour have much to contribute to each other, for example, in:

- Providing suggestive or interesting *arenas* (formal and informal) for performance
- Enabling active engagement with cultural artefacts – such as through active mediation
- Combining multi-practice events, where various arts and heritage streams come together – music and theatre, dance and street spectacle, history and performance, and so on.

The idea is to enliven/animate/amplify the cultural experiences that are available in the various quarters of Dublin (for example, those that are now familiar from *Culture Night* and those that *DubLine* uses, and there is also the interesting proposals to develop a cultural quarter in the Parnell Square area). In practice, this might involve:

- Practising artists working with cultural or heritage bodies to mediate Dublin's culture in more engaging ways, and seeking to achieve deeper personal resonances with tourists.
- Integrating the cultural activities more closely with the physical streetscape they inhabit, and building connections between cultural legacies and the real living and vibrant city quarters.
- Finding the historical 'triggers' or personal details that might open up otherwise disregarded history and artefacts – life in the tenements, in the docks area, in the markets area, late Georgian high society, and so on.
- Uncovering the hidden variety of Dublin's quarters, in particular the continuity of interest across the entire day (morning, afternoon, and night) for food, entertainment, music, the arts, and so on.

Dublin: an active and exciting natural environment

When compared against other European capital cities, Dublin is fortunate in its proximity to the sea, the mountains, and an easily accessible rural hinterland, not to mention the many fine parks in the city itself. Culturally Curious visitors to Dublin, when researched are known to appreciate this, and we need to identify ways in which we can leverage the idea of nature and the city. Such initiatives might include:

- Ways of improving access to natural amenities – the coast, the canals, parklands, rivers etc – perhaps extending cycle ways, better information on bus, train, DART and LUAS routes, etc. to develop a set of themed nature based activities
- Integrated offerings that combine the best of Dublin's natural and built environments, including themed nature experiences covering a range of activities for different parts of the day – for example, walks, food, cookery classes, evening events and entertainment and so on.
- Differentiate clearly between the different types of nature that Dublin has to offer, and examine ways that each could be animated, enlivened or facilitated – for example, the city parks, the coastal amenities, and the wider rural hinterland.

- Differentiate clearly between the types of activity that are available: from low intensity activities such as a walk on the beach or the pier to high-energy activities such as hiking through the Dublin Mountains, sea-kayaking or swimming in the sea.
- Promote the idea that so much of what is available is cost-free to the tourist, including many of the cultural offerings and that there is the potential to interweave the cultural experiences with nature, the coast, and city life.

Tourists in the *Culturally Curious* category place a high value on both cultural and nature-related activities. They like to visit museums, but they also like to fill their lungs with mountain air, or have leisurely walks in a parkland setting, or eat freshly-caught fish in a seaside setting. The more adventurous also like to take on more vigorous activities. We need to get across the idea of 'an activity for everyone' – from bird watching and cookery classes to mountain biking and sea swimming. We also need to ensure that there are appropriate activities for the different times of the day, so that tourists can enjoy a full programme.

Project ideas in this area match onto the three main nature resources available to Dublin: the sea, the rural and mountain hinterland, and the city's many parks and squares.

The sea – coastal and bay areas

Although Dubliners have often turned their backs to it, the sea is a feature of Dublin that most tourists are captivated by. For example, the very idea that it is possible to get from the city centre to a three-mile-long beach within twenty minutes is a huge and undersold attraction.

The coastal and bay areas also present a huge range of outdoor activities (at all energy levels) such as:

- Kayaking in Howth
- Bird watching in Dollymount – and walking in the footsteps of Capt Bligh
- Swimming at the Forty Foot in Sandycove
- Walking over Killiney Head.

Most of the seaside 'resorts' are easily accessible by bus and/or rail.

The project idea here is to find ways to unlock the even greater potential that Dublin's bay and coastal areas offer. For example, we could improve 'tourist' signposting, develop marked walks, and enhance the marketing, packaging and branding of the Dublin seaside experience. And this needs to happen in ways that offer rich learning and multi-sensory experiences.

Many *Culturally Curious* tourists, especially those from central Europe and many parts of North America live a very long way from the sea, and their most likely experience of it might be a crowded beach in southern Europe or Florida. We need to imagine just how exciting it can be for visitors to encounter a coastal environment that still retains so much of its wild and natural features.

City parks and squares

Dublin's city parks and squares come in all shapes and sizes and offer a range of leisure activities and points of interest. In the city, they offer a place to rest and relax between visiting museums and galleries; and some of them (particularly St Stephen's Green and Merrion Square) include monuments and artworks that are interesting in their own right.

Away from the city centre, Dublin has parks that are justly renowned – particularly the National Botanic Gardens in Glasnevin and the rose garden at St Anne's, Raheny, and we should bear in mind that many people in the *Culturally Curious* demographic have a keen interest in gardening (particularly those from Great Britain).

The Phoenix Park is a special case. It is Dublin's green lung, it is the largest enclosed city park in Europe and it offers a range of nature trails and cycle ways, as well as monuments and buildings of interest. It is home to Dublin Zoo which is already one of Dublin's premier attractions.

The project idea here is to find ways of packaging Dublin as a city that offers an interesting mix of the built and natural environments, where tourists can combine typical sightseeing activities with feeding the ducks or smelling the roses.

Hills, mountains and rural experiences

Dublin's proximity to the wild and beautiful hinterland of the Dublin and Wicklow mountains and to the rich farming lands of North County Dublin, Meath and Kildare is a feature that we need to make more of.

As with the coastal and bay project idea, we need to understand how shocking (in a positive sense) it can be for tourists to realise that they can get from the city to the wild landscapes of Wicklow or to a farmyard experience in the North County in less then forty minutes.

The project idea here is to look at how we might better package the combination of city and countryside, of culture and activity, of town and country. Most *Culturally Curious* tourists come to Dublin for a 'city break' – the idea that Dublin (city and region) is much more than a city is a very attractive one that we need to leverage

The Dublin food trail

Freshly-landed fish at Howth, fresh fruit and vegetables from the North County, craft beers and cheeses – these are all part of the quality food experience that Dublin offers tourists.

The idea here is to make the most of the multiple small food experiences that tourists can enjoy, and to develop structures within which each element adds value to the next, or where suppliers cross-sell complementary elements; and where the added value is more than the sum of the parts. Some kind of a food trail or network is what is required – a 'food DubLine' where tourists can savour the variety.

There are considerable opportunities here for individual companies in the private sector to work collaboratively to put such a structure in place.

Project 1.2: Development of a culture week or month idea

The success of *culture night* is very encouraging, and shows a great appetite for cultural and heritage activities both for tourists and for Dubliners. It has also been a route for Dubliners to engage more with their cultural heritage in a celebratory way. The sense of 'an event' or 'happening' that is somehow outside the routine but that opens up much that is otherwise latent is also valuable.

The idea here is to build on the success of *Culture Night* and to create a cultural event, lasting over a week, a fortnight or even a month. It should not compete with *Culture Night* and should probably take place at an 'off-peak' or 'shoulder' time of year. It should be presented as a marquee event in the cultural calendar. By contrast with the short, sharp, intense burst of activity surrounding Culture Night, it should offer more sustained and deeper engagement across a range of cultural and heritage events and activities.

The parallel with the DubLine is interesting; tourists know that they don't have to do all of it in one go – they can come back and fill in the gaps at any time, and in less haste. Among the challenges relating to a *culture week* or *month* will be:

- How to sustain the energy of what is now just one night over a longer period
- How to resource a longer run, and assessment of cost/benefits
- When to place it in the calendar – for example, February or November, when numbers tend to be lower
- Management, responsibility and branding – and achieving Dublin-wide buy-in for the idea

Project 1.3: Scaling up the festivals of Dublin

Dublin is a city and region of festivals, events, exhibitions and celebrations. Specifically within the cultural arena, there are successful festivals in theatre, film, dance, history, literature, music, and the visual arts. And these are complemented by festivals celebrating different ethnicities, food, the natural environment, crafts, and so on – many of which are patronised predominantly by people in the *Culturally Curious* demographic.

The project idea here is to look at ways in which the festivals of Dublin might be expanded (in both scale and reputation) as well as being further promoted and developed. This might include actions such as:

- Further developing the 'Dublin Festival Season' brand to lend a stronger group identity than any one festival can achieve on its own.
- Developing a stronger 'season of festivals' idea, within which complementary festivals might sit easily – cultural/heritage/history together with food/natural environment/outdoor pursuits and so on.
- Crossing boundaries within individual sectors – for example, Dublin as a city of musical experiences covering the range of genres, from traditional to jazz, and The Messiah to hip hop, and so on – building upon what is there already.
- Identifying the optimum slots in the calendar – to ensure Dublin is 'always on' – currently there are gaps in the calendar and months where there is too much going on.
- Exploring opportunities for festivals that can be shared with or alternated with other cities, either in Ireland or further afield – for example, the Twelve Points festival.

Project 1.4: Developing the role of artists as ambassadors

Across the range of art forms and art practices, Ireland's artists are key influencers in the way that Ireland is perceived abroad. We have cool musicians, acclaimed poets, award-winning novelists and theatre artists, visual artists who exhibit regularly at prestigious international shows, and renowned film-makers who have opened new ground in the way we tell our stories. Collectively, our artistic community presents a view of Ireland as a place where art practice and cultural activity really matter and are central to our identity. And we demonstrate the esteem in which we hold the arts through tax exemption and through Aosdána. Our artists are unofficial ambassadors for Ireland.

The project idea here is to find ways in which we can develop our artists' ambassadorial role abroad. The Arts Council and Culture Ireland already provide some funding for artists to perform, exhibit and work abroad. It might be useful to examine ways in which these funding programmes might be expanded. Any such programme, however, must respect the independence and autonomy of artists to pursue their practice.

In a parallel stream, we might develop the role of *local laureates* to celebrate individual quarters in a variety of art forms and art practices.

It might also be useful to look at less direct ways of presenting Dublin to wider international *Culturally Curious* audiences, particularly through the medium of film – one has only to think of what *Ryan's Daughter* did for tourism in the Dingle peninsula.

APPENDIX B3

Grow Dublin Taskforce

Sector Plan:

Business Tourism

Introduction

Dublin is Ireland's leading tourist destination and plays a pivotal role in the experience of most visitors to the island of Ireland. In an era favouring short and more frequent breaks, Dublin is also well placed to take advantage of the trend towards city breaks. Dublin is currently experiencing a recovery in its tourism fortunes unlike any other Irish tourist destination. Yet there are grounds for believing that Dublin could do much better, given its portfolio of attractions and events, its supporting infrastructure, and its multiple points of access, provided it puts in place a more coherent and appropriately funded strategy. Recent consumer research conducted within the key target markets indicates that Dublin's true potential is far from tapped.

Fáilte Ireland, as the National Tourism Development Authority, has a responsibility to progress such initiatives. It is the Authority's strongly held belief that given the very multi-faceted nature of the tourism offering and its extensive interdependencies across the Dublin economy, this task is best progressed in a collaborative manner.

To that end individuals and executives from across the public and private sectors with an interest and stake in this topic formed the Grow Dublin Taskforce. The Taskforce is led by a Steering Group which is assisted in its deliberations by supporting Working Groups comprised of executives of the various supporting agencies and which expand and contract to include representation from the wider Dublin industry throughout the process.

The Dublin proposition

The agreed *Dublin proposition* that has been developed following extensive stakeholder and consumer consultation is:

> **Dublin is *the* vibrant capital city bursting with a variety of surprising experiences – where city living thrives side by side with a natural outdoors.**

About the Business Tourism sub-working group

The Business Tourism sub-working group is one of five that have been established, each focusing on a different sector identified as having potential for growth.

Executive summary

Business Tourism has been one of Dublin's success stories over the last number of years following a cohesive strategy led by Fáilte Ireland, the Dublin Convention Bureau and Tourism Ireland in partnership with the business tourism trade. Business Tourism to Ireland grew by 10 per cent: from 943,000 in 2011 to over 1 million in 2012, and an estimated 70 per cent of business tourists go to Dublin. For that reason, GDT strategy for business tourism focuses on big idea programmes to supplement this strategy and grow the number of international business events confirmed for Dublin.

Business tourism covers people travelling for purposes related to their work such as:

- Individual business travel by those whose employment requires them to travel.
- Travel for meetings such as conferences, training and board meetings to help communication within the company and/or between producers, consumers and shareholders.
- Travel to exhibitions such as trade shows, product launches and consumer shows where businesses display and promote their products to potential customers.
- Incentive travel where groups of staff are rewarded with overseas travel for exceeding sales targets or winning a prize related to their employment, usually containing a conference element.
- Corporate hospitality travel, where companies impress potential clients by acting as hosts at major sporting or cultural events.

In most cases the advantages of business tourism for Dublin are similar to those for leisure tourism, except that the greater spending power of the business visitor means that economic benefits are higher. As a high yield sector with strong potential for growth, business events will make a significant contribution to the achievement of the Tourism 2020 objective.

The per delegate value of business tourism to Ireland is

- Conferences: €1,400
- Corporate: €1,150
- Incentive: €1,350
- Trade Exhibitions: €550

Business tourism benefits not just the hotels, conference centres and airlines but also local transport, restaurants, shops and visitor attractions. Delegates spend most of their time at a conference or meeting venue, relying on public or chartered transport to explore the city and travel to their accommodation. Business travel is also of benefit to the destination as it is less reliant on the traditional tourist season thereby helping to spread the economic benefits of tourism throughout the year. This also means that conflicting interests between the demands of leisure and business tourism are minimised.

Major business events also help to promote and internationalise Dublin to a global audience. Delegates who leave with a positive impression are likely to become unofficial ambassadors.

While there are a number of sectors within business tourism, the focus for this strategy is on those sectors that can be successfully promoted (conferences and exhibitions, incentive travel, and corporate meetings), where there is real potential to influence the decision-making process to deliver on the growth targets outlined.

The business tourism workshops identified that when Dublin is chosen as the location for a business conference, the conference achieves at least 10% more international delegates than comparison cities. The aim of the programmes outlined in this document are to increase the number of business tourism events and delegates coming to those events and to ensure that delegates spend more while in the city through the implementation of the three identified 'big ideas'.

Within the business tourism sectors mentioned above, the workshop identified the incentive sector as having one of the greatest potential for growth. This sector looks for authentic, surprising, unique experiences – providing an excellent opportunity for Dublin to reposition itself in line with Dublin's new brand proposition. Similarly, by repositioning Dublin to the international association conference market, these delegates may be encouraged to extend their stay and/or return in the future.

Presenting Dublin coherently

In order to ensure that the development of Dublin as a destination is coherently presented, all of the programme ideas and activities advanced must take into account the core elements of the ***Dublin proposition.*** This means ensuring that Dublin's core brand values are reflected in every sector plan, programme and project; these include:

- **Vibrancy** – is it dynamic, contemporary; does it add a sense of self-perpetuating energy?
- **Bursting with a variety of experiences** – does it show the variety of compelling experiences that are easily accessible?
- **Surprising** – does it surprise? Does it contain new experiences and convey existing experiences in a novel way?
- **City living thriving side by side with the natural outdoors** – does it bring the city living that thrives side by side with the natural outdoors to life in an engaging way?

Activity to date

Stakeholders met on three occasions in September 2013, setting themselves the tasks of identifying the following in relation to the *Business Tourism* sector:

- The target audience for suggested programmes, projects and actions
- The barriers that might inhibit growth, and the opportunities or needs that might overcome them
- The programme areas within which projects and actions might be focused
- Some detail of the projects and actions that might be appropriate and feasible, within each of the defined programme areas.

Definitions and participants

Definitions

Programme

The management of several related projects in a 'programme'. Examples of such programmes would be a city-wide celebration where several work streams need to work separately but are critical to the delivery of the platform. These would be managed under the programme to ensure that the dependencies are being considered – including time constraints, budgets and deliverables.

Project

A short-term or temporary piece of work with defined start and finish, undertaken to meet unique goals, objectives and challenges that are not considered 'business as usual'.

Action/task

Outcome-based activity assigned to one or several people that ensures that a small scale task (such as sending an update etc.) is completed in a defined period of time.

Participants

The following people contributed to the work of the *Business Tourism* sub-working group.

Sue Uda	A Touch of Ireland
David Monks	Double Tree by Hilton Hotel Dublin
Nicola McGrane	Conference Partners
Jenny Finegan	Dublin Convention Bureau
Keith McCormack	Fáilte Ireland
Mary Cunningham	MUSA
Willie Sheils	South Dublin County Council
Christoph Haustein	TIFCO Hotel Group
John Keogh	Aer Lingus
Paul Carnell	The Convention Centre Dublin

Barriers and opportunities

The following is a discussion of barriers to the development of the business tourism industry and of how these might be overcome.

Barriers	Opportunities: project ideas
Sales approach There is a need to refine and improve the way we go after our identified business tourism sectors; this includes identification of target audience, sales channels used, availability of product information and our sales techniques and methods.	Build industry resilience, productivity and quality providing insights to better understand and better target the international business events client.
Industry knowledge There is a high turnover of staff, lack of knowledge of client or sector, increasingly short lead in times to turn around RFPs, pinch on staff resources which affect the service which is provided during the sales process.	**Up-skill industry** With an investment in training and education from influencers and product providers these areas can be addressed which could result in immediate impact. Create Corporate Expert Programme which will incentivise industry to improve their product knowledge. Extend current industry training to wider business tourism sector which addresses sales techniques for winning Meetings and Conferences. This includes best practice for RFPs and site inspections.
Wider industry comprehension Lack of understanding by the small business/ product providers of the international sales process and the basics needed to communicate their offering and with quick turnaround (for example, floor plans, photos, availability and costs).	**Annual BT conference** The industry needs to be educated on the nature of business tourism in Dublin which will assist them with planning and deciding on which sectors to target.
Lack of business tourism bid support	**Wider city buy in for MICE bids** Fáilte Ireland to develop New BID fund to be used for winning Business Tourism Events for Dublin. Events to be selected based on their potential economic return for Dublin. Fáilte Ireland to create new Conference Incubation fund which is aimed at nurturing home grown conferences which have the potential to attract large numbers of international delegates as well as support a key industry sector e.g. technology or medical science. Web Summit to be used as a case study for developing criteria for this fund. Wider city buy in – council, DAA, transport, retail etc.

contd/

Barriers (contd)	Opportunities: project ideas (contd)
Product and experience Our product offering is not meeting customer expectations. Scale and capacity of venues and accommodation gala venues – size and options	**Update and reinvigorate incentive offering** Offer insights on previous conference to the accommodation sector when rooms are 'booked out' (held) far in advance when an international conference is booked. They may be released six weeks beforehand, to allow for better business tourist planning. The grading and communication of non-hotel accommodation could assist in overcoming this problem.
Lack of standardised business tourism accommodation – e.g. university campus	**Introduction of categorisation for BT providers** The information needs to be presented better or certainly categorised with perhaps an agreed minimum standard defined and enforced but grading may have negative results
Fragmented brand and communications approach There is not a consistent approach to how we communicate our offering	**Communication strategy – to potential clients and trade** Redress misconceptions of our product offering from the availability of different accommodation types, the standard of same, the standard in service provided from product providers on the ground to the availability of things like free wi-fi. Brand and offering needs to be updated and modernised – Sale Process i.e. using USPs and creating communication strategies for each segment and market using insights.
Fragmented local corporate leads approach	**Leverage Dublin's innovation and technology success** Develop partnerships with our corporate giants like Twitter and Google to help win/support a BID for hosting leading technology events. Specifically target technology events that are relevant to these partners.

Audience/partners and secondary target

Audience /partners

By repositioning Dublin via a motivating, differentiating and credible proposition, current perceptions of the city will be reframed and new realities formed in the minds of consumers and those who influence their choices. This will put Dublin as a destination firmly on the map as the place in which to do business.

The programmes and projects in this sector are designed to stimulate, reinvigorate and facilitate business to business promotion of Dublin as a location for business conferences, incentive travel and corporate meetings. We expect that this will deliver further growth in business tourism, and (in conjunction with the programmes and projects described) will encourage business tourists to spend more, to come before or stay after their business, to recommend Dublin to others, and to come back as leisure visitors.

Participants in the workshops identified the following as the target audience:

- **International associations:** The areas of greatest potential are those in which Ireland has an industrial or research base, a track record and an international reputation. In these areas, we have international connections and have a greater chance to win association conference business.
- **Core professional conference organisers** who will be presented with the new proposition of Dublin as a modern, vibrant, business-visitor-friendly city.
- **Universities:** We can work with the universities to help them to bring international research conferences and seminars to Dublin.
- **Research agencies**
- **International Incentive Houses, travel agents in other cities/countries, venue-finding agencies, and corporate agencies:** The new proposition will be delivered to these intermediaries in a compelling way, and backed up with new incentive packages and programmes that reflect it, so that Dublin comes to the top of their list of possible destinations
- **Corporate direct:**
  - Multinational companies with Irish operations
  - Local companies who have a link with international companies (suppliers, partners etc.)
  - Conference delegates from technology companies.

  To date any success in this area has been unstructured and there is an opportunity to grow our corporate business. This often requires a 2 pronged approach, targeting the decision makers in both Ireland and in the markets.
- **Conference delegates from technology companies** – technology conferences like the Web Summit, Localization World and many others are now taking place in Dublin, which welcome senior representatives from leading technology companies.
- **City Linkages:** We can work with our twin towns and cities to identify opportunities for Dublin – possibly with events being held in each city in alternate years.

Programmes

The Business Tourism subgroup identified three 'big idea' programmes for the business tourism sector.

- **Become the vibrant capital destination for business visitors**
- **Reposition Dublin in the international conference destination arena**
- **Create a corporate agents reward club and Incentive expert training programme**

Within each of these programmes and the projects that will see them implemented, it is important that the core elements of the proposition be used as a filter and an animating force, so that Dublin as a destination brand is coherently and consistently presented. This means ensuring that Dublin's core brand values are reflected in every sector plan, programme and project.

Each of these programmes is described in turn below.

Programme 1: Become the vibrant capital destination for business visitors

The idea is to ensure that every business visitor to Dublin has a streamlined, professional experience and that there is consistency across the board at every touch point. Refining these basic requirements of the business visitor in the first instance will underpin the Association and Corporate and Incentive programme ideas.

Project 1.1: One Dublin One Message – a coherent and consistent sales pitch

The sales process and pitch require a consistent and targeted approach. This consistency needs to exist from the first point of contact, BID and proposal pitches through to conducting the site inspection. While some are performing well in this area, many are not. This area can be addressed in the following ways.

- Industry training programmes – programmes are currently being rolled out for operators in the conference area. This needs to be rolled out more widely and further developed
- Develop updated examples of best practise including sales pitches, itineraries and BID documents
- Offer one to one mentoring
- Structured and individualised feedback for on-site inspections. A third party company will be contracted to 'conduct 'mystery shop type' inspections when they will accompany DCB on official site inspections and give detailed and individualised feedback on the inspection to the operator.

Modernise Dublin's Business Tourism Brand

Refine and modernise the Dublin tourism business tourism brand. The new Dublin Tourism Brand and key selling points as well as examples of best practise should be rolled out to all trade. New content should then be created to reflect this message. This will ensure a consistent message from anyone selling business tourism in Dublin.

New Online Portal for Dublin

There is a need for a comprehensive and integrated online portal in order to bridge the serious communication gap. This gap affects event organisers, the trade, Dubliners, and the international business community – both prospective visitors and those that are in town. This is also an issue that is a macro project for the Dublin 2020 programme, rather than specific to the business tourism sector.

Project 1.3: Wider city buy-in

Hotels, restaurants, retailers, taxi-drivers and other service providers should be made aware that a major event is in town, and should be encouraged to display the logo and a welcome message. This requires a B2B communication strategy. More generally and for smaller events, there needs to be a city-wide understanding (including among the general public) that visitors are important to Dublin, that they are good for business, and that giving them a warm welcome will benefit everyone. This is an important message, given that large events inevitably entail a certain amount of disruption to 'business as usual'. It has been agreed that this issue needs to be addressed as a macro project for the Dublin 2020 programme.

The activities to realise this project include:

- Develop B2B strategy in conjunction with relevant associations like BIDS
- Communicate with hotels and larger retailers
- Hold open day(s) for small businesses to communicate benefits of business tourism and to develop appropriate skills (sales process, experiential product development etc.)
- Make information available on organisations that can help businesses to develop their offerings
- Communicate at local level, e.g. taxis, retail outlets, and general public

Project 1.4: Easy access and navigation

A business visitor to Dublin must find it easy to get around. A number of initiatives would help to realise this.

- Getting around the city can also be a challenge for delegates; conference delegates could be given a sponsored Leap card and/or voucher for a taxi company to use for the duration of their conference and possibly for one or two days afterwards. This could be sponsored by a local company. It would encourage the visitor to see more of the city and its surroundings and to spend money away from the immediate vicinity of their conference.
- The activities necessary for this project include:
- Feasibility study on sponsored travel card
- Engagement with relevant stakeholders roll out of sponsored travel card to conference delegates on a trial basis
- Marketing and communications of the service
- Evaluation of the success of sponsored travel card
- Develop interactive map and relevant technology within the online portal

Programme 2: Reposition Dublin as an international conference destination

The new Dublin branding proposition presents an opportunity to communicate differently to target audiences with an updated message using the core elements of the proposition. The idea is to continue on the success in the conference area, focusing on the 3 main strategic areas, medical science, education and technology.

Project 2.1: Refine a new conference bid strategy

The idea emerging from the workshop was to refine the research and partnership strategies to identify 'big' business tourism events that Dublin has the potential to win. Ideally these would be multi-year events and/or new and large business events that are not currently held in Dublin.

Bidding for such events can be highly visible, with considerable media exposure, and have the effect of increasing awareness of the bidding destination, and attracting events and tourists other than the main target of the bid.

Ideally one large multi-year business event will be won and used as a test case, while research for other events will take place in parallel over the seven-year period.

Most biddable business tourism events are large events that are offered at a national or international level and it is unlikely that a destination will be chosen to host the event frequently (for example, ESOF 2012). Some, however, are hosted in the same city for a number of successive years, and the ambition is to identify multi-annual business events for which Dublin is a potential host (for example, WOMEX).

Tasks involved will include:

- Identify key stakeholders, including national and local government authorities, domestic and international media, and event facilities and service providers
- Identify potential large multi-year events that Dublin can realistically bid for in line with our overarching strategic priorities – i.e. Medical Science or Technology and that are leading events in their respective industries
- Develop partnerships with our corporate giants like Twitter and Google to help win/support a BID for hosting leading technology events
- Identify technology events which currently take place in other European cities e.g. LIFT in Geneva, BETT in London, Enterprise Summit in Paris, Social Media World Forum in London (a full calendar of technology events is available on *http://socialmedia.biz/2013/01/07/2013-conferences-social-media-tech-mobile-marketing/*)
- Work with Dublin's twin towns and cities to identify opportunities for Dublin – possibly with events being held in each city in alternate years
- Develop a coordinated business calendar of the targeted business events
- Feasibility study to look at capacity of Dublin to host the event
- Construct a stakeholder engagement plan to include top/bottom involvement
- Form business alliances; increase collaboration among trade
- Design technology platform to enable two-way communication (this will be addressed as a macro project)

Note: Disabled access needs to be considered and promoted as a review point in advance of bidding for large events, as without this many PCOs will not even consider a location.

Project 2.2: Find out why conference bids succeeded or failed

In order to develop a clear and concise communication message, we need to establish what made some bids succeed and other fail. This will enable us to fine-tune the message that we use in future bids. The tasks involved include:

- Identify business events that were successfully hosted in Dublin
- Identify business events that were tendered for but not successfully captured by Dublin
- Identify successful and unsuccessful bid characteristics
- Develop strategies to overcome negative sentiment from feedback

Project 2.3: Target past conferences with the new proposition

Many conferences and meetings have taken place in Dublin over the past few decades. One of the key characteristics of the international conference sector is that the conferences rotate on an annual basis from city to city, from country to country, and from continent to continent. This project proposes a targeting of conferences that were previously held in Dublin, emphasising the new Dublin proposition – 'come again and discover the "new" Dublin'.

- Identify list of conferences that were held in Dublin over the past two decades and have not returned
- Contact the conference organisers with the new message through the filter of Dublin's new proposition
- Communicate new products, services and experiences that will motivate in line with the brand proposition
- Include message re Dublin and Ireland's high-tech successes (enterprise and research) in bids
- Use executives in Dublin-based multinationals as ambassadors

Project 2.4: Create communications collateral for industry to tailor

The communication strategy needs to objectively examine what the consumer is seeking and how the destination can fulfil that need. It needs to articulate the destination's identity and positioning, as well as highlight its unique selling proposition.

To facilitate a cohesive communication message, a range of communication assets needs to be developed and tailored for different audiences. The more communicating synergy that can be achieved between the local organisations and service providers, the greater the destination's impact is likely to be in the marketplace.

This project highlights the need to create material for the trade to facilitate their own communication strategies in line with the new brand proposition.

Project 2.5: Leverage Dublin's innovation and technology success

Dublin has been particularly successful in attracting multinational companies in the technology sectors, and its universities becoming renowned world-wide for their scientific and technological research. The executives, researchers and academics in these organisations are well-connected internationally, and have the ability to influence the location of international business meetings and conferences. Irish-based personnel with such connections should be encouraged to use them to attract more international business to Dublin, and they should be facilitated in doing so.

- Develop collateral that can be used to promote Dublin as an attractive location for science, technology and business meetings
- Make contact with business executives and academics to encourage them to act as ambassadors for Dublin.

Project 2.6: Cluster leisure events around conferences

Business visitors are known to be high spenders across hospitality, retail, arts and culture, and many of them could be attracted to spend additional time in Dublin, either before of after their conference, if suitable leisure events were programmed at the 'shoulders' of their conference. Success in this will depend on information sharing, advance planning and coordination.

- A comprehensive business events calendar should be developed, maintained and made available to leisure events organisers.
- Leisure events should be promoted to business conference organisers in sufficient time to allow them to publicise them to conference delegates before they book their flights.

Project 2.7: Create a corporate agents reward club and incentive expert training

The idea is to ensure that corporate agents are incentivised for bringing business events to Dublin and agents both home based and overseas can become 'experts' in a selection of incentive programmes by taking part in a series of training platforms.

Corporate agents rewards club

The corporate agents Rewards Club would create a landing page so that Agents can log all business placed in Dublin.

Agents would be incentivised to log business as the top ten agents at the end of the year will be given a VIP weekend break to Dublin. (Value of business confirmed as matrix) The agents would also receive a 'Dublin Expert' badge that they could promote to potential clients wishing to place business in Dublin.

Activities

- Create landing page for UK Agents
- Create 'Dublin Expert' badge
- Direct Mail piece – Send personalised DCB Directories to our current top 20 Agents
- Invite them to sign up for Dublin rewards club
- VIP Fam trip – invite top 5 over for VIP fam trip
- Launch initiative at the 'Meet Dublin in London Event'
- Promote 'Meeting Space Deal of the Week' type offers

Objectives

- Promote Dublin as a strong contender for corporate meetings over other UK destinations
- Create stronger relationships with UK Agents
- Promote the corporate funding for conferences over 250pax – in turn win more corporate meetings for Dublin.
- Capture the business won for Dublin
- Promote Dublin Convention Bureau Services

KPI

- Become more relevant in the UK Corporate meeting market
- Grow business won for Dublin trade
- Grow UK corporate leads.

Incentive expert training programme

This project would include a programme of training for both home based and overseas agents/DMCs who can become 'experts' in a selection of incentive programmes by taking part in a series of training platforms. They would then receive a badge of accreditation.

B4

APPENDIX B4

Grow Dublin Taskforce

Sector Plan:

Events

Introduction

Dublin is Ireland's leading tourist destination and plays a pivotal role in the experience of most visitors to the island of Ireland. In an era favouring short and more frequent breaks, Dublin is also well placed to take advantage of the trend towards city breaks. Dublin is currently experiencing a recovery in its tourism fortunes unlike any other Irish tourist destination. Yet there are grounds for believing that Dublin could do much better, given its portfolio of attractions and events, its supporting infrastructure, and its multiple points of access, provided it puts in place a more coherent and appropriately funded strategy. Recent consumer research conducted within the key target markets indicates that Dublin's true potential is far from tapped.

Fáilte Ireland, as the National Tourism Development Authority, has a responsibility to progress such initiatives. It is the Authority's strongly held belief that given the multi-faceted nature of the tourism offering and its extensive interdependencies across the Dublin economy, this task is best progressed in a collaborative manner.

To that end individuals and executives from across the public and private sectors with an interest and stake in this topic formed the Grow Dublin Taskforce. The Taskforce is led by a Steering Group which is assisted in its deliberations by a supporting Working Group comprised of executives of the various supporting agencies and which expands and contracts to include representation from the wider Dublin industry throughout the process.

The Dublin proposition

The agreed Dublin proposition that has emerged is:

> **Dublin is *the* vibrant capital city bursting with a variety of surprising experiences – where city living thrives side by side with a natural outdoors.**

About the Events sub-working group

The *Events* sub-working group is one of five that have been established, each focusing on a different sector believed to have potential for growth.

Executive summary

The Events sub-working group identified a number of targets for a tourism development strategy. The strategy must work to attract potential visitors, particularly in the Social Energiser and Culturally Curious sectors which have been identified as primary target markets for the Grow Dublin Taskforce; the sub-group also identified additional audiences in Dubliners themselves, event organisers, statutory bodies such as the Gardaí, the emergency services, and industry stakeholders.

It was agreed that in order to attract the visitor market, the primary audience needs to be event organisers. Our first task, before involving industry or communicating with Dubliners, is to address the statutory bodies to ensure that appropriate structures are in place.

The areas of deficit that were identified as needing to be addressed included a widespread lack of awareness of existing events, inadequate targeting at the relevant sectors, a lack of coordinated planning, the lack of a template for event planning and development, poor packaging of groups of events in order to maximise impact, insufficient collaboration between event organisers, a lack of 'unmissable' headline events with international appeal, funding deficiencies and limitations in the transport infrastructure.

It was agreed that a number of issues, such as transport and funding, are higher-order matters that are common to several sub-groups, and that these should be dealt with separately.

A single 'big idea' that emerged from the Events sector sub-group was to make to make Dublin a vibrant, happening city, and two substantial project ideas are advanced as to how this might be brought to light. These are the establishment of an Events Dublin Forum to help streamline event planning and development, and the development of a major events strategy to establish Dublin as the location of a number of major events that are in keeping with the Dublin proposition.

Presenting Dublin coherently

In order to ensure that the development of Dublin as a destination is coherently presented, all of the programme ideas and activities advanced must take into account the core elements of the ***Dublin proposition.*** This means ensuring that Dublin's core brand values are reflected in every sector plan, programme and project; these include:

- **Vibrancy** – is it dynamic, contemporary; does it add a sense of self-perpetuating energy?
- **Bursting with a variety of experiences** – does it show the variety of compelling experiences that are easily accessible?
- **Surprising** – does it surprise? Does it contain new experiences and convey existing experiences in a novel way?
- **City living thriving side by side with the natural outdoors** – does it bring the city living that thrives side by side with the natural outdoors to life in an engaging way?

Activity to date

Stakeholders met on three occasions in September 2013, setting themselves the tasks of identifying the following in relation to the *Business Tourism* sector:

- The target audience for suggested programmes, projects and actions
- The barriers that might inhibit growth, and the opportunities or needs that might overcome them
- The programme areas within which projects and actions might be focused
- Some detail of the projects and actions that might be appropriate and feasible, within each of the defined programme areas.

Definitions and participants

Definitions

Programme
The management of several related projects in a 'programme.' Examples of such programmes would be the execution of a citywide celebration where several work streams need to work separately but are critical to the delivery of the platform; these would be managed under the programme to ensure that the dependencies are being managed (such as time constraints, budget and deliverables)

Project
A project is a short term/temporary piece of work with a defined start and finish undertaken to meet unique goals, objectives and challenges that are not considered 'business as usual'

Action/task
Outcome-based activity assigned to one or several people that ensures that a small scale task (such as sending an update etc.) is completed in a defined period of time.

Participants
Sub-group meetings were held on 17 and 25 September 2013 on the premises of Fáilte Ireland and were two hours each in duration. The following people contributed.

Keith McCormack	Fáilte Ireland
Edel Mitchell	Fáilte Ireland
Ursula Donnellan	DCC
Clyde Carroll	Dublin City BID
Adrian McLoughlin	Gibson Hotel
Mike Adamson	O2
Peter McKenna	Croke Park
Justin Green	MCD Promotions
Noeleen McHugh	Fingal County Council

An initial draft of this document was discussed at a Working Group meeting on 8 October, along with the inputs from the other sector working groups. The document was then revised to reflect the views of the wider group and to recognise that some ideas and themes were common to more than one group and should be treated independently of the sector discussions.

Barriers and opportunities

A number of barriers to growth were identified in the Events sector, and in many cases, opportunities to address these barriers were identified.

- **Awareness:** A lack of awareness of existing events, not just among visitors, but also among Dubliners and even among event organisers themselves. *This will be addressed via the Digital Network and Strategy cross-sectoral enabling project*.
- **Targeting:** Targeted communication is lacking in relation to events which might be, for example, of particular appeal to Social Energisers or the Culturally Curious.
- **Coordination:** There is a lack of the coordinated planning which would ensure optimum event timing, an even distribution of events across the year, and the avoidance of clashes. This includes a lack of shared advance planning, where an event may be in preparation for a year or more but proposed dates are not shared with other interested parties until much closer to the event's occurrence. *This is addressed through the establishment of the Dublin Events Forum.*
- **A reluctance to share information:** Some event organisers may not be willing to share the content or details of their events for reasons of commercial sensitivity.
- **Template:** There is no standardised approach for event planning and coordination with the relevant agencies *but this can be overcome through an agreement to work together as an industry.*

- **Packaging:** Many events are short-lived and are not packaged for maximum appeal (for example, by creating other related events), missing the opportunity to entice visitors to extend their stay.
- **Collaboration:** Event organisers are not communicating enough with each other, leading to insufficient cross-selling of events and a lack of appreciation of the mutual benefit of transitioning smoothly from one event to the next. *This project is addressed with the establishment of the Dublin Events Forum.*
- **Headline events:** There are not enough of the 'unmissable' mega-events of international appeal that can be a reason for visiting a city.
- **Funding:** Some events are too big to be funded by a single organiser – an innovative approach may be needed.
- **Transport:** Transport facilities between and to events is inadequate. *This barrier is tackled as a cross sectoral enabler project.*

Audience/partners and secondary target

Audience /partners

This sector plan and its projects are proposed for Dublin's Event Organisers and the broader Events Industry within the context of the ***Dublin proposition***. The purpose of this sector plan is to help event organisers and the identified sector partners to meet tourism growth targets with projects reflecting Dublin as '**the vibrant capital city where city living thrives side by side with the natural outdoors**'.

The audience for this sectoral plan includes:

- **Event organisers.** These will be particularly important in relation to the coordination of events and collaborative approaches to scheduling and promotion.
- **Statutory bodies.** Bodies such as the Garda Síochána, the Fire and Ambulance Service, the HSE's Environmental Health Services, the Health and Safety Authority, Fáilte Ireland, transport providers, and the local authorities, all of whom are likely to have a major partner role in events planning.
- **Stakeholders/Industry.** It will be important to engage the awareness and participation of experience providers (in a broad sense) to maximise the success of events and the enjoyment that participants derive from them.
- **Dubliners.** As enablers and collaborators to help deliver on the potential of the proposition to attract the target market.

Target market

The target market for the Events sector includes:

- **Visitors from outside Ireland** in the Social Energiser and Culturally Curious groups – these are the initial targets for the GDT strategy.
    - **However,** any event must appeal to Dubliners first – they are an important market in their own right and can also be useful advocates for events which are successful.

Programmes

The Events sub-group proposed 1 main programme:

- The establishment of an Events Dublin Forum; and

In parallel, the sub-group also proposed the development of a Dublin events calendar as a cross-sector enabling project. This is described briefly on page 10, and will be dealt with in more detail in the main strategy document.

Programme 1: Establish an Events Dublin Forum

Sports events, music events and festivals all have the potential to bring large numbers of visitors into Dublin. The objective of this project is to establish a forum that will make event planning and development easier for event organisers and help maximise the return on each event, both to the event itself and to Dublin as a whole.

This project aims to bring together all the main players – event organisers, venues, and service providers – to enable them to share information and to collaborate in a variety of ways to make the total offering – and the benefits arising therefrom – greater than the sum of the individual parts.

The forum would be of benefit both to existing players in the events market and also to others who have the potential to sell into that market. It would improve the event planning process, reduce the likelihood of event clashes, increase the possibility of leveraging complementary events, and help to ensure more even scheduling over the year.

Project 1.1: Develop a major events strategy

The main objective of this programme is to establish Dublin as the location of a number of major events that are in keeping with the ***Dublin proposition***. It is based on the premise that there may already exist (or could be created or imported) events that would have sufficient international appeal to raise Dublin's profile in the ranking of short break destination cities. It is expected that the development of this strategy will be an early priority of the Events Dublin Forum.

Achievement of this objective will involve:

- Identifying four or five major events (established or new) that fit with the new Dublin proposition, have specific appeal for the target segments (Social Energisers, Culturally Curious), and that will quickly reframe Dublin in the minds of our target consumers.
- Identifying the criteria used by event organisers in selecting a destination for these events.
- Making sure that Dublin can meet all of the requirements to host these events.
- Putting together a bid team and a budget.
- Bidding for the events, and analysing results (win or lose).
- Repeating this process until we secure a number of desirable events in keeping with the ***Dublin proposition*** and increase tourist numbers.

It will be vital to develop new, locally generated events, rather than relying on importing events from elsewhere, and that a creative team should be brought together to stimulate ideas for new events.

Project 1.2: Clustered and shoulder events

A major event has potential impact beyond the event itself. By strategically clustering other, complementary events before, after or around the major event, we can encourage visitors to extend their stay in Dublin. Clusters of events have the potential to boost the participation in all the events organised. For that reason we need to prioritise events that have the potential to attract clusters of other events around them. To develop this idea, we need to:

- Identify existing 'shoulder' events or events which, because of their compatibility with a given flagship event, could become a credible shoulder event, even if not currently so aligned in the calendar. Shoulder events are those that take place between peak season and low season.
- Develop events packages combining flagship and shoulder events.
- Encourage cross-marketing among the organisers of these events.

The workshops proposed that a 'Best Practice' event be found for 2014 which could be used as a case study for application in following years. An example was suggested of Halloween/ Bram Stoker Festival.

Project 1.3: The opportunity of 2016

The year 2016 was identified as a key opportunity in the calendar between now and 2020. The centenary of the Easter Rising was seen as a significant opportunity to create another 'Gathering'-style cluster of events spanning literature, music, sport and historical re-enactment that might appeal to different sectors and include different times of the year, driving tourism incrementally throughout 2016, not just for the anniversary of the Easter Rising. The actions necessary to deliver this include:

- Investigate what is planned at Government, Council and industry level.

Identify additional elements capable of being developed (examples proposed were homecoming concerts from Ireland's most successful music acts, or a GAA Diaspora All-Stars, bringing GAA clubs from all over the globe back to Croke Park). .

Project 1.4: One-stop shop for event organisers

Event organisers very often have to start working from scratch, and have a steep learning curve to develop their project. They have to find out about a wide range of regulatory and licensing issues that affect them, research the availability of suitable venues, find sources of finance, and deal with a host of other administrative details that may all be new to them. This can get in the way of them concentrating on programming and promoting their event, resulting in a less than optimal outcome, both for the event organisers and for Dublin.

To help overcome these difficulties, a 'one-stop shop' for event organisers is proposed as a single source for information and advice on regulatory requirements and processes, venues, and service providers. In its scope, this initiative should include both indoor and outdoor events (where applicable), and be relevant to large, medium, and small events. It should work with the regulatory authorities, the Gardaí and all other relevant stakeholders to reduce red tape and to streamline and standardise administrative procedures. Much of the information could be provided in the form of templates and checklists. These templates will be standardised across the four county councils.

A one-stop shop of this kind would also provide a platform for event organisers to share information with each other, build on their collective experience, and collaborate more easily.

The actions that are needed to deliver on this include:

- A study of how such processes are managed in other cities that have recognised good practice in this area. Examples include New York City Global Partners website and Ottawa's *Best Practice: One-Stop Shop for Event Organizers.*
- Identifying key individuals in the statutory bodies and capturing their knowledge and expertise, specifically: local authorities, Gardaí, fire and ambulance services, HSE Environmental Health, Health & Safety Authority, Fáilte Ireland, major venues, and so on.
- Collating the essential information in terms of procedures, standards and practices, including statutory requirements (for example in relation to health and safety).
- Developing guides, standardised templates and checklists for the efficient and compliant planning and running of an event.
- Write up an example as 'Proof of Concept'.
- Communicate all of this to current and potential event organisers.

Project 1.5: Create and maintain a central calendar of events

The creation and maintenance of a central calendar of events is regarded as a key initiative. The main objectives are to reduce the number of event clashes, increase the clustering of complementary events, and ensure that Dublin is a year-round 'always on' destination for tourists, in line with the ***Dublin proposition.***

The calendar must be comprehensive and always up to date, and this can be achieved only with the cooperation of the event organisers, whose interests it must clearly reflect. For consumers, the calendar must provide links to the websites of the events, the venues, the artists, the ticket booking agents, and the intermediaries who put together packages (including accommodation etc.), so that it becomes a real 'one-stop shop' for the visitor.

This initiative is relevant to all sectors and has been elaborated on that basis as a key cross-sector enabling project in the main strategy document.

B5

APPENDIX B5

Grow Dublin Taskforce

Sector Plan:

Cruise Tourism

Introduction

Dublin is Ireland's leading tourist destination and plays a pivotal role in the experience of most visitors to the island of Ireland. In an era favouring short and more frequent breaks, Dublin is also well placed to take advantage of the trend towards city breaks. Dublin is currently experiencing a recovery in its tourism fortunes unlike any other Irish tourist destination. Yet there are grounds for believing that Dublin could do much better, given its portfolio of attractions and events, its supporting infrastructure, and its multiple points of access, provided it puts in place a more coherent and appropriately funded strategy. Recent consumer research conducted within the key target markets indicates that Dublin's true potential is far from tapped.

Fáilte Ireland, as the National Tourism Development Authority, has a responsibility to progress such initiatives. It is the Authority's strongly held belief that given the multi-faceted nature of the tourism offering and its extensive interdependencies across the Dublin economy, this task is best progressed in a collaborative manner.

To that end individuals and executives from across the public and private sectors with an interest and stake in this topic formed the Grow Dublin Taskforce. The Taskforce is led by a Steering Group which is assisted in its deliberations by a supporting Working Group comprised of executives of the various supporting agencies and which expands and contracts to include representation from the wider Dublin industry throughout the process.

The Dublin proposition

The agreed *Dublin proposition* that has been developed following extensive stakeholder and consumer consultation is:

> **Dublin is *the* vibrant capital city bursting with a variety of surprising experiences – where city living thrives side by side with a natural outdoors.**

About the Cruise Tourism sub-working group

The Cruise Tourism sub-working group is one of five that have been established, each focusing on a different sector identified as having potential for growth.

Executive summary

Dublin has considerable natural and infrastructural advantages that make it very attractive to the cruise sector. This is an area of tourism that has increased substantially in recent years, and there is real potential to grow both the number of cruise ships that visit Dublin and the value that cruise tourists bring to the city and region[1]. Already, cruise tourists spend considerably more in Dublin than they do in other European ports.

Even in difficult economic times, the cruise industry has so far proven to be relatively recession-resistant – particularly in Northern and Western Europe – and Dublin has seen both the number of ships and the number of cruise tourists increase substantially over the past decade: from 53 ships and 32,000 cruise passengers in 2004 to over 100 ships with 106,000 passengers in 2013.

For the purpose of cruise tourism, Dublin is served by two ports – Dublin Port itself and Dún Laoghaire harbour. Dublin Port's cruise business is well-established and growing; Dún Laoghaire is in an early stage of development. In 2013, 20,000 passengers and crew arrived in Ireland via Dun Laoghaire harbour. There were also two "turnaround" calls with circa 1,400 passengers spending an average of 2 bed-nights in Dublin Port. Both ports plan to grow their cruise traffic in the years ahead.

The realisation of the potential that the cruise industry offers Dublin, however, will require concerted and collaborative efforts from the shoreline service providers, the ports, local authorities and agencies, and the providers of wider tourism services. The industry is dominated by a small number of cruise companies, based mostly in the US, and we need to engage with, develop and market effectively to these.

This report sets out some of the directions that such a programme might take with a view to achieving the strategy objectives. It is a key output from a process of engagement with stakeholders at a sub-working group level.

Presenting Dublin coherently

In order to ensure that the development of Dublin as a destination is coherently presented, all of the programme ideas and activities advanced must take into account the core elements of the ***Dublin proposition.*** This means ensuring that Dublin's core brand values are reflected in every sector plan, programme and project; these include:

- **Vibrancy** – is it dynamic, contemporary; does it add a sense of self-perpetuating energy?
- **Bursting with a variety of experiences** – does it show the variety of compelling experiences that are easily accessible?
- **Surprising** – does it surprise? Does it contain new experiences and convey existing experiences in a novel way?
- **City living thriving side by side with the natural outdoors** – does it bring the city living that thrives side by side with the natural outdoors to life in an engaging way?

Activity to date

Stakeholders met on three occasions in September 2013, setting themselves the tasks of identifying the following in relation to the *Cruise* sector:

- The target audience for suggested programmes, projects and actions
- The barriers that might inhibit growth, and the opportunities or needs that might overcome them
- The programme areas within which projects and actions might be focused
- Some detail of the projects and actions that might be appropriate and feasible, within each of the defined programme areas.

1 Throughout this document 'Dublin' is taken to include the wider Dublin region, and visitors to Dublin include visitors who are based for most or all of their time in Dublin.

Definitions and participants

Definitions

Programme
The management of several related projects in a 'programme'. Examples of such programmes would be a city-wide celebration where several work streams need to work separately but are critical to the delivery of the platform. These would be managed under the programme to ensure that the dependencies are being managed – including time constraints, budgets and deliverables.

Project
A project is a short term/temporary piece of work with a defined start and finish undertaken to meet unique goals, objectives and challenges that are not considered 'business as usual'

Action/task
Outcome-based activity assigned to one or several people that ensures that a small scale task (such as sending an update etc.) is completed in a defined period of time.

Participants
The following people contributed to the work of the *Cruise* sub-working group.

Miriam Brady	Dublin Bus
Kiela Brodigan	Fáilte Ireland
Gerry Farrell	Dublin City BID
Sam Johnston	Fáilte Ireland
John McGrane	Dublin Chamber of Commerce
Kate McManus	Old Jameson Distillery
Eamonn O'Reilly	Dublin Port
Eilish Smith	Dublin City Council
Ronan Sweeney	Excursions Ireland

Barriers and opportunities

The following barriers were identified:

- The cruise ship model is inherently rigid. Passengers have a pre-set period of time on shore, and for larger vessels this may be determined by the tides.
- There is inadequate coordination between the different bodies working in, benefiting from, and developing cruise tourism in Dublin. For example, Dublin Port has a good track record at bringing in ships, but it is not geared up to market Dublin as a destination.
- The cruise line business is a conservative business, with a high level of repeat business. Cruise line executives tend to stick to what works, and it takes considerable effort to get them to accept anything new. In most cases they will want to try out new packages in advance to satisfy themselves that they work.
- Cruises are usually planned and scheduled well over a year in advance. This means there are very long lead times for those offering to provide onshore services.
- Cruise has both a B2B and consumer element and we currently do not have adequate insight into the passengers and consumers we hope to attract to Dublin on cruise ships. This is a gap – we need to have some understanding of the cruise consumer.
- Events, attractions and packages are more geared to visitors staying in hotels. There are few products that can be promoted as 'cruise-ready'.

Opportunities to overcome barriers

The perceived barriers point to what needs to be done, the opportunities open to us, and the conditions that must be satisfied in order to grow the cruise business; these include the opportunities/needs to:

- Sell itineraries well ahead of time and plan very carefully what is offered.
- Develop strong relationships with key decision-making cruise line executives.
- Develop Dublin as a destination on cruise itineraries *and* potentially as a turnaround and interport.
- Address the inadequacies in the recording of statistics relating to cruise tourists – CSO does not count them because they don't usually overnight in Ireland; also, get more detailed information on the demographic profile of cruise tourists.
- Develop greater variety in the packages and itineraries available to cruise tourists.
- Address the acknowledged patchy quality of public WiFi in the port area.
- Retain and develop Dublin City BID collaboration in servicing the cruise ships from a tourism information perspective.
- Work with other Irish ports to strengthen the offering to cruise line executives. Because of its geographical location, there are opportunities for Dublin to be included in many itineraries.

vPromote the proximity of Dublin's ports to Dublin airport, where there are US Customs and Border Control, and direct connections to over 100 European cities.

- Encourage and facilitate the development of 'cruise ready' experiences, events, attractions and packages.

Audience/partners and secondary target

Audience /partners

The strategy needs to be understood, adopted and implemented by:

- Businesses/sectors involved in tourism – e.g. the arts/theatre sector, museums, retail, restaurants etc.
- Bodies such as the port authorities and the agencies who bring people in, shoreline executives etc.
- State organisations with responsibility for promoting tourism and for funding infrastructural and enterprise development.

Target market

The strategy needs to address the interests and practical requirements of the Cruise sector:

- Key decision makers and influencers in the international cruise business and the agencies through which cruises are booked – the cruise business is dominated by three large US-based companies.
- Tourists considering taking cruises and choosing between the options available.
- Tourists who have booked a cruise that includes Dublin on its itinerary.

Programmes

At the macro level, there are two overarching objectives that the cruise sector needs to work on:

- How to grow Dublin as a cruise ship destination in volume terms – the number of ships and number of passengers coming ashore.
- How to develop offerings that make it attractive for cruise tourists to come ashore, enjoy a rich visitor experience in Dublin, spend money while they're here and have such a good time that they want to come back for longer and to tell all their friends how good it was.

In seeking to identify ways of achieving these objectives, a number or project ideas and initiatives were identified. These come under the umbrella of a programme to position Dublin as a must-see cruise destination, as outlined below.

Programme 1: Position Dublin as a 'must see' destination for tourists choosing cruise holidays in Europe

Project 1.1: Establish Cruise Dublin Forum

In order to develop and market Dublin effectively as a cruise destination, a dedicated *Cruise Dublin* forum should be established to galvanise and coordinate the strategies and actions of the many different stakeholders that will need to act in concert in order for all to benefit.

What's new here is the shared understanding and willingness to work collaboratively among all players in the sector. The *Cruise Dublin* forum will need to:

- Gather detailed statistics on the current cruise line business into Dublin and, based on that, model the future scale of the business. This will enable us to determine what level of infrastructural development is required and to outline the business case for any such investment.
- Focus on the advantages of Dublin as a destination, both for the cruise line companies and for cruise visitors.
- Identify deficiencies in the Dublin offering for cruise companies and their customers.
- Work together to remedy the deficiencies and strengthen the offering.
- Develop and execute a marketing plan to present details of the range of facilities, itineraries, events and attractions available, both to the cruise operators and to their customers.
- Make sure that the practical information that cruise tourists need before they come to Dublin is readily available to them, so that they are better prepared to avail of what is on offer.

The early actions under this programme include agreeing the membership, terms of reference, and setting out a programme of work for the immediate and medium term.

Project 1.2: Develop a strategy for cruise tourism in Dublin

The strategy for cruise tourism should have two aims:

- To increase the number of cruise ships and cruise tourists coming to Dublin, and
- To increase the value derived from each tourist who does come. This is something that we can seek to achieve in the short term – already, cruise tourists spend more on average in Dublin than they do in other European ports.

The first people we need to address are the cruise line executives. The cruise line business is dominated by three large US-based companies, and they largely determine what ships call to Dublin. We need to ensure that they are enthusiastic about Dublin and put it on the itineraries of more ships. We need to place a strong focus on strong B2B contacts, and leverage the presence of Irish tourism agencies in North America.

To develop our offering, we need to know more about the profile of the cruise tourists who come to Dublin; we need to develop better and more appropriate itineraries for them while they are here; and we need to ensure that Dublin's tourism sector and the other potential beneficiaries understand the scale of the potential and scale up accordingly.

Profile cruise tourists

At the moment, we just don't have enough detail about cruise ship tourists. The CSO does not include them in its tourist statistics, and there is work to be done in analysing the demographics – age, nationality, income level and so on.

The better we know our target audience, the easier it will be to develop offerings that meet their needs. Activities in this project area might include:

- Gathering detailed demographic data on cruise tourists, so that we can better understand their requirements and develop products and services that will encourage them to spend more money while they are in Dublin.
- Gathering greater detail about the passengers on each ship.

Develop cruise-ready itineraries

Work needs to be done with the industry to ensure that Dublin is presented as an attractive destination for cruise visitors – either by packaging existing offerings more attractively or by developing new offerings. In this context, there is a need for education and awareness-raising among the stakeholders who have something to contribute and something to gain from the increase in business. The itineraries suggested for cruise tourists must fit within the time they have in the city, and they must be easy for the cruise lines to present and sell. Developing such itineraries will require collaboration between a number of providers.

Useful projects might be undertaken in areas such as:

- Gathering details of what other popular cruise ports, such as Antwerp, Vancouver and Copenhagen, offer.
- Tailoring standard itineraries to fit the constraints of particular cruise ships'

schedules, perhaps four or six-hour programmes that include a variety of content such as retail, dining, heritage/cultural/artistic activities, music, and so on.

- Considering the potential for out-of-hours access to retail or other facilities. The arrival and departure of ships may be determined by tidal and other scheduling factors, so, given sufficient notice, some large stores might be able to open exclusively for cruise customers early in the morning or late at night to coincide with ship arrival and departure times.
- Working with the arts/theatre sector to develop short pieces that present some flavour of Dublin's rich literary and artistic heritage – perhaps at times when theatres/venues are otherwise empty.
- Putting together itineraries that are clearly more than the sum of their parts, where passengers feel that they are somehow special and that they are getting a package that they could not assemble themselves.
- Putting together walking tours/museum tours/retail tours/dining tours that are tailored specifically for cruise tourists.
- Making it more attractive for cruise tourists to take up more of the itinerary offerings.
- Collaborating with other ports that are or might be on an itinerary that includes Dublin – such as Belfast, Cork, Waterford, Glasgow, Copenhagen, Liverpool and Southampton.

Promote our cruise-ready offerings to the trade

When we have a credible cruise-ready offering, it needs to be promoted to the cruise operators and the travel agencies. We need to:

- Develop strong personal relations at a business to business level with the key executives in the cruise line and travel agency businesses and ensure that they appreciate the value and extent of Dublin's tourist offering.
- Present executives with itineraries and other proposals that they will find easy to sell to their customers and from which they can derive revenue – they are always looking for new ideas and experiences that they can work successfully into a package.
- Give cruise line executives the opportunity to sample the offerings, so that they are confident that they work and are comfortable including them in the portfolio they offer their customers.
- Provide better and more targeted marketing collateral to cruise operators, to help them to sell the idea of Dublin to their customers.
- Leverage the idea that ships can dock very close to the heart of the city – one of Dublin's unique selling points.

Use cruise business to generate repeat business

The value of a cruise tourist's experience in Dublin is necessarily constrained by the short time they spend here. We need to ensure that the 'taster' they have had of Dublin is so good that they want to come back. Our task is to make sure that they come back to fill in the gaps in what they've seen and experienced, and that they tell their friends and families to come too.

The good opinion of cruise tourists themselves is the best marketing that we can have. We need to address cruise tourists (and potential cruise tourists) directly, using as much as possible the testimonials and reviews of those who have already experienced Dublin. In large part this is done through general consumer marketing that raises awareness of Ireland in general and Dublin in particular, and encourages people to consider Dublin as a holiday destination. Nevertheless, the potential of targeting potential cruise visitors directly should be explored. This will involve:

- Developing a marketing strategy aimed specifically at end customers.
- Finding ways to address the tourists we know are coming and to provide them with the information they need.

Develop Dublin as turnaround and interporting hub

Currently, Dublin's cruise tourism business is almost entirely 'port of call' business, where passengers arrive on the cruise ship, spend a few hours in Dublin and then depart. Cruise tourists typically do not overnight in Dublin, and add little to Dublin's night-time economy.

Dublin has considerable potential to grow as a turnaround or interporting hub where passengers either start or end their cruise in Dublin. This would greatly increase the value of such tourists, as they would in most cases spend time in the city before or after their cruise.

Dublin's advantages as an interport/turnaround hub include:

- Proximity to a major international airport, with exceptionally good air connectivity to Europe, North America and the Middle East
- Good logistics – in particular, ease of access between Dublin Port and Dublin Airport.
- A robust capacity in terms of hotel beds – over 20,000 in Dublin city and county

Dún Laoghaire also offers potential for development as a cruise port, and the two ports need to work together to make the most of what Dublin offers prospective cruise tourists.

To make progress towards this goal, we need to:

- Identify infrastructural work that may be required to support turnaround/interporting business.
- Promote Dublin as a turnaround/interport destination to cruise line executives and itinerary planners.
- Attend highly targeted cruise marketing events (such as Cruise Shipping Miami and Seatrade Europe).
- Pilot interporting and turnaround business in a structured way to demonstrate proof of concept.
- Target markets for which Dublin might be particularly attractive – for example, Central Europe and North America.
- Learn from the event and business tourism sector how they overcome perceived capacity issues.

Project 1.3: Develop Cruise Dublin portal

The development of a *Cruise Dublin* online portal was identified as a key enabling project to pull together a variety of strands in the cruise tourism sector. It is an essential element in making Dublin cruise-ready. The portal would:

- Become *the* place where shore-based companies present the different offerings they have for this market.
- Focus strongly on the needs of potential customers.
- Incorporate some mechanisms for eliciting customer opinion and reviews.

Consider the models of similar organisations/portals in cities such as Antwerp, Copenhagen and Vancouver.

This initiative is relevant to all sectors and has been elaborated on that basis as a key cross-sector enabling project in the main strategy document.

APPENDIX C

Grow Dublin Taskforce

Objective 3

Objective 3

Background

The Grow Dublin Task force is concerned with the articulation of a collaborative funding and implementation model to deliver the tourism strategy to 2020. In order to establish best practice internationally in Destination Marketing Organisations (DMOs) in the delivery of growth, thirteen international competitor DMOs were researched and analysed focussing on organisational structure, business model and stakeholder collaboration. Learnings from the analysis would (where relevant) be applied to the new Dublin implementation model.

Competitor Analysis

While Dublin has suffered a decrease in visitor numbers over the past decade, other cities within Dublin's peer group have enjoyed a period of growth achieved in a challenging global economic environment (the average growth rate year on year in Europe is 5%*). To understand the drivers behind this growth and by doing so, identify key desirable features for a new Dublin implementation model, the GDT conducted research consisting of both a review of existing documentation and one-to-one qualitative and quantitative interviews with CEOs and senior executives from the following DMOs: Amsterdam, Barcelona, Berlin, Brussels, Copenhagen, Glasgow, Hong Kong, Lisbon, Liverpool, Prague, Vancouver, Vienna and Washington.

In order to establish each city's success relative to one another and to European averages (provided by European cities marketing reports) all cities were surveyed and subsequently benchmarked in the following areas:

i. Structure and business model
ii. Stakeholder Engagement
iii. City Performance
iv. Critical Success factors

*European Cities Benchmarking Report 2013

Of all the cities surveyed, Copenhagen and Amsterdam were identified as having the models most suited to delivering Dublin's new strategy. This conclusion was based on a mixed criteria analysis which took into consideration Dublin's needs defined as follows:

- A high level of stakeholder engagement city wide with a defined engagement structure
- A structure that enables high performance in our key sectors (Leisure, Business tourism, Cruise and Events Tourism)
- A funding structure that requires those stakeholders who benefit to contribute (ie a public/private partnership with beneficiaries of promotional activities funding accordingly ensuring that those who benefit from the activity pay for the activity)
- Shared responsibility for city goals
- A DMO Structure that facilitates ambitious visitor growth (ambitious in this context can be defined as a higher rate of growth year on year than the European average of 5%)
- A Sustainable Funding Model

Copenhagen and Amsterdam scored the highest and second highest respectively under these criteria.

Key Desirable Features of the Copenhagen and Amsterdam Models

Structure and Business Model

- Wonderful Copenhagen and IAmsterdam are not for profit, public/private partnerships with a near 50/50 ratio of public to private funding
- Wonderful Copenhagen and IAmsterdam both rated their funding model as sustainable and both cities have had sustained funding over the last 10 years (in Copenhagen's case 20 years) allowing for strategic planning, vision and growth.
- Both cities have a fully collaborative city approach to tourism and a defined engagement structure is in place for all the cities sectors (eg business tourism, cruise tourism, leisure tourism etc) which include industry representatives and primary public stakeholders (eg Mayor's office)
- Wonderful Copenhagen has an organised separate industry network for each sector such as "Cruise Copenhagen" and "Meet Copenhagen" whereby all stakeholders involved in that sector are represented. Each stakeholder contributes financially to the sector that they benefit from and are involved through a representative advisory board in agreeing projects and deliverables for that sector. Each industry sector then reports back to the Wonderful Copenhagen board which comprises both public (includes politicians) and private representatives from across the city.
- Wonderful Copenhagen transitioned to being a project based organisation which

it identified as best practice in order for it to deliver an ambitious strategy. Each initiative is treated as a project, fully scoped and a project team assembled based on competencies required.

City Performance

Copenhagen

- Copenhagen has the 3rd highest year on year growth rate in Europe (Berlin and Barcelona have the highest) at 8.3% from 2008-2012. The European average is 5%
- Copenhagen moved up from 14th place in 2011 to 8th on the 2012 International Conference & Congress (ICCA) world ranking which benchmarks cities according to the number of international conferences held per year. Copenhagen's jump was the highest recorded of all world cities in 2012.
- Copenhagen (through its cruise network) grew its cruise ship performance from 220 cruise ships in 2001 to 372 in 2012 (producing 840,000 passengers)

Amsterdam

- Amsterdam ranks 9th in Europe for international bed nights delivering 8.1 million a year (Dublin delivers 6.1m international bed nights)

- Amsterdam ranks 10th on the ICCA business tourism world ranking and has been in the top 10 for the last 7 years.

Brand

- Both Copenhagen and Amsterdam have city wide brands used by both public and private sector when selling their city. Copenhagen uses Open Copenhagen and Amsterdam IAmsterdam. Copenhagen's brand was championed by Wonderful Copenhagen and employs a full time brand manager along with a separate industry network. IAmsterdam said that their city is defined by co-operation with one city, one focus, one brand: IAmsterdam

Critical Success factors from across all 13 Cities surveyed (according to two or more DMOs)

- Significant private ownership allowing independence from political motivation
- Corporate culture ("can do" attitude)
- Use of comprehensive data and analysis to inform strategic planning
- Flexibility as an organisation
- Stakeholder buy in
- Project Based Approach
- Close alignment with stakeholders/members needs
- A major event which brought all stakeholders in the city together emphasising the value of collaboration

APPENDIX D

The Process Behind the Strategy Development and Grow Dublin Task Force Membership

Background to the Establishment of the Grow Dublin Taskforce

Dublin is Ireland's leading tourist destination and plays a pivotal role in the visitor experience of most visitors to the island of Ireland. In an era favouring short and more frequent breaks, Dublin is also well placed to take advantage of the trend towards city breaks.

Tourism in Dublin has declined since its peak in 2007, although some markets are showing signs of recovery. Nevertheless, there are grounds for believing that Dublin could do much better, given its portfolio of attractions and events, supporting infrastructure and points of access. Recent consumer research conducted within the key target markets indicates that Dublin's true potential is far from tapped. Realising this potential, however, requires a coherent and appropriately funded strategy, which is owned and implemented by all major tourism stakeholders in the Dublin city and region.

Fáilte Ireland, as the National Tourism Development Authority, has a responsibility to progress the development of such a strategy. It is the Authority's strongly held belief that, given the very multi-faceted nature of the tourism offering and its extensive interdependencies across the Dublin economy, this task is best progressed in a collaborative manner.

To that end individuals and executives from across the public and private sectors with an interest and stake in the future of Dublin tourism came together in December 2012 to form the Grow Dublin Taskforce. The Taskforce was led by a Steering Group that included industry representatives and executives of the various supporting agencies, supported by Working Groups. The Working Groups comprised a broad representation from the Dublin tourism industry – both public and private - in order to ensure that appropriate expertise and experience were brought to bear on the development of the strategy.

The objective of the Taskforce was to deliver a tourism strategy and implementation plan for the period to 2020 that realises Dublin's potential to attract increased levels of tourism. This strategy will require the active collaboration of *all* involved in communicating, developing and delivering the Dublin tourism experience, including the city and county councils, the businesses involved in providing goods and services to visitors, the cruise and events sectors, and the Dubliners themselves.

The Opportunity

The rate of growth of visitor numbers into Dublin is below that of Dublin's main capital city competitors, such as Copenhagen and Amsterdam – cities that have a more clearly defined and coherent offering. Dublin fell out of the Top 10 TripAdvisor Destinations in 2013. The aim of the Taskforce is to re-establish Dublin as one of the most desirable, 'must see' visitor destinations in the world.

To achieve this, we have defined a compelling, competitive destination brand idea for Dublin city and region that is motivating to potential tourists, gives direction and inspiration to stakeholders, and is capable of sparking an implementation plan that will attract more visitors and more revenue to Dublin. The brand will unite the various elements of the visitor experience under a unifying theme that will attract more visitors and will deliver an experience that they will want to repeat and to tell their friends and family about.

This presents a considerable challenge: the development of a destination brand is fundamentally different and more complex than branding a product or service. It requires us to capture the essence of Dublin and to ensure that the articulation of this essence is both competitive *and* compelling to potential visitors – and it needs to be done in a way that supports and is supported by the Ireland brand.

The brand proposition must reflect what is relevant and motivating to potential visitors, both now and over the next seven years and beyond. A refreshed and re-energised Dublin brand will ensure growth by reframing Dublin – both for visitors and for Dubliners. It will change existing perceptions and create excitement and a focal point for all stakeholders involved in delivering the visitor experience.

The Process

The Grow Dublin Taskforce developed the strategy and the plans for implementing and promoting it in three main stages:

- Discovery and getting input to proposition areas
- Visitor proposition research in the US, mainland Europe and Great Britain
- Stakeholder research and strategy development

Review of earlier work

The Grow Dublin Taskforce began by reviewing all available reports on tourism in Dublin and competitor cities. These revealed a clear need for Dublin to develop a powerful, differentiated destination brand proposition clearly positioned in the context of the other important elements of the Ireland brand, including those developed by Tourism Ireland, Enterprise Ireland, IDA Ireland, Bord Bia, and Culture Ireland.

Substantial guidance was obtained from two separate but related projects – the Irish Tourism Industry Confederation's report *Capitalising on Dublin's Potential*, and the Creative Dublin Alliance's work on *Activating Dublin*.

Documents reviewed in the development of a differentiating proposition for Dublin:

1 **Irish Tourism Industry Confederation,** *Capitalising on Dublin's Potential* **project:**
  i. Background papers (Research material)
  ii. Executive Summary
  iii. Main Report

2 **Creative Dublin Alliance:**
  i. Brand Dublin Roadmap
  ii. Discovering Dublin's Identity
  iii. The Compendium Designing Dublin: Learning to Learn
  iv. Love the City
  v. Activating Dublin Scoping Material
  vi. City Indicators & International Benchmarking Reports
  vii. Activating Dublin City Benchmarks
  viii. Activating Dublin Destination Dublin
  ix. Activating Dublin Tourism Business Case

3 **Dublin Regional Authority:** Dublin's Role in the National and Global Economy Report 4 - Synthesis Report. Reports 1 to 3 also available.

4 **Development Plans of the four Dublin local authorities** set out the framework for the future development of the city/ county, and help to emphasise the regional importance of this work:
  i. Dublin City Council: Dublin City Development Plan 2011 – 2017
  ii. Dún Laoghaire-Rathdown County Council: Dún Laoghaire-Rathdown County Development Plan 2010 – 2016
  iii. Fingal County Council: Fingal Development Plan 2011-2017
  iv. South Dublin County Council: South Dublin County Development Plan 2010-2016

5 **Destination Branding**
  i. Destination Branding (2002) Morrison & Anderson
  ii. How to Brand Nations, Cities and Destinations (2009) Moilanen & Rainisto
  iii. Introductions to the Theory of City Branding (2011) Keith Dinnie

6 **Branding**
  i. Aaker D.A. (1991) Managing Brand Equity – Capitalising on the Brand Name
  ii. Aaker D.A. (1996) Building Strong Brands
  iii. Blackstone M. (1992) Observations: Building Brand Equity by Managing the Brand's Relationships, Journal of Advertising Research
  iv. Fyall, A.C. Callod and B. Edwards (2002) Relationship Management – The Challenge for Destinations – Annals of Tourism Research
  v. Kapferer J.N. (1992) Strategic Brand Management
  vi. Sharp B.M. (1993) Managing Brand Expectations. Journal of Customer Marketing.

7 **Global Reports**
  i. Intuit 2020 Trends Report (2010)
  ii. OECD Paper on the Middle Classes
  iii. Technology & Tourism 2020 – Vision Tourism 2020
  iv. The Economist – Special Report on Aging
  v. The Economist – Special Report on Middle Classes

8 **Fáilte Ireland Reports**
  i. Dubline Interpretative Matrix
  ii. Dubline Toolkit
  iii. Dublin Destination Study - Destination VAS Results (unweighted)
  iv. Dublin Doorstep Destination Study - Destination VAS Results (unweighted)
  v. Future Tourism Demand Insights, Internal Briefing Paper
  vi. Topline findings from Segment Research (2012)

9 **Tourism Ireland Reports**
  i. Brand Tracker, France, (2012) Millward Brown
  ii. Brand Tracker, Italy, (2012) Millward Brown
  iii. Brand Tracker, Spain (2012) Millward Brown
  iv. French Market Profile
  v. French Review Strategic Plan 2011-2014
  vi. Italian Market Profile
  vii. Spain Market Profile
  viii. TI Segmentation, MCCP & Arkenford

10 **Other Dublin Research**
  i. Blue Sail Dublin City plus marketing blueprint
  ii. Blue Sail Dublin City plus: a shared story
  iii. Business Tourism Ireland Positioning, (2009) Jump
  iv. Design Factory, Discovering Dublin Outputs from the Discovering Dublin Branding Workshop
  v. Meeting in Ireland Brand Story, (2010) Tourism Ireland

Brand Strengths and Weaknesses

The Taskforce undertook a review and distillation of brand strengths and weaknesses, as well as existing brand insights and propositions, and this led to the development of a new proposition for Dublin.

City and County Council Development Plans

Tourism is featured in all four local authorities' Local Plans in the Dublin City and Region: Dublin City Council, Fingal County Council, South Dublin County Council and Dún Laoghaire-Rathdown County Council. Vibrancy, diversity, innovation-based, sustainable tourism/ environmental focus, green, clean, tourist-friendly facilities and the need for collaboration to the benefit of tourism are all highlighted as important in the City and County Development Plans to varying degrees.

In the Dublin City Development Plan 2011-2017 all developments have tourism in mind and the core strategy highlights three necessary elements in the vision:

- A compact, quality, open, clean, connected city;
- Real economic recovery, creative networks;
- Creating sustainable neighbourhood communities.

The vision for the city is that within the next 25 to 30 years, Dublin will have an established international reputation as one of the most sustainable, dynamic and resourceful city regions in Europe, and that Dublin, through the shared vision of its citizens and civic leaders, will be a beautiful, compact city, with a distinct character, a vibrant culture and a diverse, smart, green, innovation-based economy. It will be a socially inclusive city of urban neighbourhoods, all connected by an exemplary public transport, cycling and walking system and interwoven with a quality bio-diverse green space network. In short, the vision is for a capital city where people will seek to live, work and experience as a matter of choice. Two of the key projects referred to in this document are the development of Dublin Bay and the development of Dublin's Cultural heritage.

The Fingal County Council Development Plan 2011-2017 highlights the importance of collaboration and tourism:

- Commitment to developing the airport as the principle gateway to Ireland
- Considerable scope for developing tourist friendly local resources
- A clear environmental focus that would be complimentary to the development of tourism.

The Dún Laoghaire Rathdown Development Plan 2012-2016 recognises the Council's role in promoting sustainable tourism and securing the development of tourist-orientated facilities in the county.

Maximising our Potential for Success

Dublin's Role in the Irish and Global Economy 2012 Working Paper summarises many of the threats to Dublin asserting a competitive advantage. ITIC research materials include others, such as access and signage inadequacies, lack of investment in infrastructure, lack of physical connectivity, interregional competition and products lacking sufficient cultural attractions. Media and trade reports indicate that Dublin's tourism product is becoming tired and needs new attractions for younger visitors. Existing brand reports, including the Creative Dublin Alliance documents, ITIC research materials, and Discovering Dublin's Identity Report, all point to important success factors such as the need for accessibility, increasing WiFi, and improving transport links.

All reports note that recommendations by people who have influence in and over the experience on the ground are crucial for success and in this respect the general public in Dublin and the media are important participants. Visitors also want an authentic experience and to see the living city. Thus it is essential that Dubliners take ownership and pride in their city, and be receptive to tourists. The Branding Dublin Roadmap highlights the potential of the diaspora – as evidenced by the success of The Gathering in 2013.

Competitive Brand Development

The Irish Tourism Industry Confederation's *Capitalising on Dublin's Potential* project contains a competitive analysis. This makes it clear that although history and culture are key elements in Dublin's competitive offering, they are not sufficiently unique or competitive. Dublin needs to articulate a proposition that reflects the reality of the city and its region, that differentiates it from its competitor cities, and that is compelling and attractive.

All reports reviewed emphasise that Dublin must focus on packaging and communicating itself in a way that complements and enhances its existing identity. A complete review of positive elements across all reports revealed many potential proposition elements. These were distilled into a range of propositions for industry and stakeholder comment. Six propositions were researched during July 2013. Key elements that were deemed to be important to the distinctive Dublin proposition included:

- A friendly, green, cultural and fun destination
- A compact city with a feeling of intimacy
- Using technology to market Dublin
- A global city with a small-town feel; a walkable city with 78 sq.m. of green space per person
- A city of paradoxes/contrasts (high and low, mountain and sea, playful and intense, historical and modern, traditional and quirky, etc.)
- Access to mountains and coast; on the doorstep of Europe
- Close to nature
- Outstanding literary and cultural heritage
- A mischievous, quirky and unpredictable personality
- Friendly people

The ITIC CODP report emphasises that the Dublin proposition must embrace both the city centre and the wider Dublin region.

In terms of negative image perspectives that need to be addressed, many documents reviewed acknowledge the need to redress the imbalance between alcohol and cultural activities. The Dublin Word Cloud clearly demonstrates that associations with alcohol and alcohol-based activities are stronger than historical or cultural associations. This was confirmed by subsequent research undertaken by the Grow Dublin Taskforce in four countries[1].

Addressing Visitors' Needs

The final piece of the review was to assess what visitors expect or need from a short break. A review of existing research showed visitors expressing leisure needs as follows:

- New and different – 'wow' factor
- Be entertained, enthused and to learn
- Have fun
- Enjoy a variety of experiences (from small-scale to large-scale)
- Authenticity – meet real people, see living culture
- Get to the heart of the experience quickly
- Belong
- Hear traditional and contemporary Irish music
- Sense of connection
- Hear interesting stories and learn something new about Dublin
- Experience traditional and contemporary culture/history
- Experience living culture (and the energy behind that)
- Social currency
- Easy access and navigation
- Do what the locals do
- Engaging stories
- Discover a place for myself
- Value

1 Grow Dublin Taskforce MCCP qualitative visitor research 2013

The Development of the Proposition

The next step in Dublin's destination brand project was to develop a number of propositions that capture Dublin's ability to meet the visitor needs and that incorporate the insights gained.

The Taskforce set out a number of defining characteristics of Dublin, as follows:

Dublin is different because:

- Of the diversity of the events to be experienced at any one time in any one visit
- It is on Europe's doorstep and is easy to combine with a visit to another European destination
- It is a city of paradoxes
- It is a truly interactive modern city
- It is a city of surprises
- It is the city by the sea
- It is a compact and concentrated city
- You can be in the city yet feel like you're in the countryside
- In a world where the impersonal is replacing the personal, Dublin is still a real city of real people
- It is socially inclusive and infectious

These initial ideas were developed into coherent propositions in an interactive workshop assisted by tourism branding consultants, and these were tested in a variety of ways. Accounts were created on Facebook and Twitter (#dublinislistening), and key stakeholders, bloggers and social networkers were involved to extend the reach of the campaign. Questions were posted to start the debate and real-time insights were gathered from overseas visitors to Dublin and from Dublin residents. The propositions were presented to a broad range of tourism industry stakeholders during an Engagement Day, during which they were further refined. The propositions below are those that first went to stakeholders, followed by the revised proposition after stakeholder commentary from the workshop:

Initial draft proposition	Revised proposition
Dublin is a playground of mischief & laughter: Feisty, youthful, intelligent wit, creative & smart, evolving but not losing a sense of where we come from, where you can let your fun side out	**Dublin is a city that becomes your playground**
Dublin is a city of Contrasts: Dublin is unexpected, there is something different, out of the ordinary and surprising around the next corner. Get right to the heart of it.	**Dublin, a city of surprising contrasts**
Living the Vibe of Dublin: Access to Dublin life, where the Dubs go, living city, being able to live the vibe of Dublin and experience Dublin as a living organism.	Excluded – not powerful enough on its own and covered by 'playground', above
Dublin is concentrated and compact: Not diluted or made for tourists, youthful, intelligent, feisty and full on – day and night, a mischievous playground	**Dublin, the village city**
Dublin is a place where you can connect with and experience colourful history **Dublin is the City of Stories, Engagingly told**	Merged to become: **Dublin. A city of surprising contrasts**
Dublin is a Cultural City with a Creative Edge	Excluded as a proposition in its own right – Dublin needs to be more than the cultural city, given the competitive set, but culture is a crucial element to be carried across and support all propositions.
Dublin is a city by the sea, beneath the mountains – much more than urban	**Dublin City, where mountains meet the water**

The Taskforce reviewed Dublin's main issues and reassessed the brand objectives in light of the research as follows:

- Dublin lacks a differentiating proposition in the mind of the potential visitor. This leads to a shortage of reasons to visit. There is no derived social status from visiting Dublin.
- Dublin is seen mainly in the context of brand Ireland, and thus carries some stereotypes that conflict with short break motivations.
- The Dublin image lacks vibrancy and modernity, and its cultural and historical associations can be seen as dry and dusty.

Together, these outline the key barriers to the growth of tourism in Dublin:

- Lack of awareness of what Dublin offers, and
- The distorted and limited view of Dublin as dusty and old-fashioned.

The challenge is to surprise people with the reality of a Dublin that is modern, diverse and distinctive.

In the final stage of developing the proposition, six alternative propositions were tested and validated in July 2013 in interactive workshops with key target segments (13 groups, with 90 participants across four overseas markets – Great Britain, Germany, France and the US – and a group of recent immigrants to Dublin. The six propositions that were put to these groups were:

- Dublin: the capital city where playful energy is catching
- Dublin: a capital city of surprising contrasts
- Dublin: the city that's bursting with life,

packed with things to do around every corner
- Dublin: the capital city that takes you in so you become one of us
- Dublin: the capital city where urban life thrives side by side with Mother Nature
- Dublin: the capital city of colourful stories brought to life.

Research findings were clear and unanimous in all markets – the fifth proposition above ('the capital city where urban life thrives side by side with Mother Nature') holds the most potential. It is truly competitive and distinctive as a proposition area for Dublin, but it needs to be strengthened to heighten Dublin's vibrancy and unexpectedness.

A further stakeholder engagement day was held to disseminate and validate consumer findings and to receive input into the recommended proposition developed from research. The final proposition that was agreed by the Taskforce with the support of all stakeholders was:

Dublin is the vibrant capital city bursting with a variety of surprising experiences – where city living thrives side by side with the natural outdoors.

Focus on the Visitor

The Grow Dublin Taskforce identified five sectors – Business, Events, Cruise, Social Energiser, and Culturally Curious – that have potential for significant growth:

- Visitors to Dublin for business reasons;
- Leisure: 'Social Energisers' – young couples and adult groups looking for excitement, new experiences, and fun, social getaways to novel destinations. They typically want city breaks that offer fun, laughter and lots of day- and night-time activities.; and
- Leisure: 'Culturally Curious' – mostly older couples or solo travellers with time (and money) to spend. They are independent 'active sightseers' looking to explore new places and broaden their minds. They want to 'do a place', both its culture and the beauty of its landscape. They respond well to good information, and of all the groups are best disposed towards Ireland as a destination.
- Visitors to Dublin as part of a European cruise;
- Visitors coming to Dublin for a specific event;
- Visitors arriving in Dublin as part of a European cruise.

The Taskforce set up working groups to analyse the market in each of these segments and to identify ways in which Dublin could realise its potential for attracting those visitors. These working groups met on several occasions in 2013, and drew up comprehensive plans for developing their markets, based on the new Dublin brand proposition.

The reports from these working groups were reviewed by the Taskforce, and common themes were identified and developed as key projects.

Maintaining Momentum

One of the main conclusions reached by the Grow Dublin Taskforce is that success will depend on collaboration and cooperation between the various public bodies, industry groups, and service providers. The process of developing this strategy and the sector plans in this document was an important first step in this regard, and the participants in the process are unanimously enthusiastic about continuing to engage in the implementation phase.

Together, the participants in the Grow Dublin Taskforce have subscribed to a focused and unifying commitment:

'We will work together to unlock Dublin's vibrancy and diverse, surprising experiences'.

This commitment, and the enthusiasm with which the new Dublin proposition is adopted, is the most critical element in the drive to attract more visitors. It is the catalyst that will re-energise the industry and enable participants to see the city in a new light, to talk about it in a new way and to create new business opportunities. It provides the motivation and the focus for developing new visitor experiences, for revitalising existing ones and for promoting Dublin as a destination that is a vibrant, exciting place to visit.

With the new proposition and the energy that the industry puts behind it, Dublin can be repositioned as one of Europe's top destinations, both for business travellers and for leisure tourists.

The Grow Dublin Taskforce Membership

Steering Group

Lucy McCaffrey – Chairperson
Danny McLoughlin – County Manager South Dublin County Council
Jim Dunne – Creative Dublin Alliance
Mary Kerins – Dublin Airport Authority
John McGrane – Dublin Chamber of Commerce
Richard Guiney – Dublin City BID
Brendan Kenny – Dublin City Council
Philip Maguire – Dublin City Council (from April 2013)
John Tierney – Dublin City Council (until April 2013)
Shaun Quinn – Fáilte Ireland
Philomena Poole – Fingal County Council (until June 2013)
Paul Gallagher – Irish Hotels Federation
Nicola McGrane – Irish Tourism Industry Council
Cllr. Oisín Quinn – Lord Mayor of Dublin,
Cllr. Naoise O'Muiri (until June 2013)
Niall Gibbons – Tourism Ireland
Ciarán O'Gaora – Zero G

Working Groups

Jim Dunne – Creative Dublin Alliance
Mary Kerins – Dublin Airport Authority
John McGrane – Dublin Chamber of Commerce
Richard Guiney – Dublin City BID
Paul Clegg – Dublin City Council
Lorna Maxwell – Dublin City Council
Margaret Geraghty – Dublin City Council
Kiela Brodigan – Fáilte Ireland
Keith McCormack – Fáilte Ireland
Aidan Pender – Fáilte Ireland
Miriam Kennedy – Fáilte Ireland
Orla Carroll – Fáilte Ireland
Noleen McHugh – Fingal County Council
Paul Gallagher – Irish Hotels Federation
Nicola McGrane – ITIC
Peter Nash – Tourism Ireland

Business Tourism Working Group

Sue Uda – A Touch of Ireland
David Monks – Burlington Hotel
Nicola McGrane – Conference Partners
Jenny Finegan – Dublin Convention Bureau
Keith McCormack – Fáilte Ireland
Mary Cunningham – MUSA
Willie Sheils – South Dublin County Council
Christoph Haustein – Tifco Hotel Group

Cruise Tourism Visitors Working Group

Miriam Brady – Dublin Bus
John McGrane – Dublin Chamber of Commerce
Gerry Farrell – Dublin City BID
Ailish Smyth – Dublin City Council
Eamonn O'Reilly – Dublin Port
Ronan Sweeney – Excursions Ireland
Sam Johnston – Fáilte Ireland
Kiela Brodigan – Fáilte Ireland
Sabine Sheehan – Old Jameson Distillery

Events Working Group

Peter McKenna – Croke Park
Clyde Carroll – Dublin City BID
Ursula Donnellan – Dublin City Council
Keith McCormack – Fáilte Ireland
Edel Mitchell – Fáilte Ireland
Noeleen McHugh – Fingal County Council
Adrian McLoughlin – Gibson Hotel
Mike Adamson – Live Nation
Justin Green – MCD Promotions

Social Energisers Working Group

Shane Cahill – Barnacles Hostel
Elaine Carroll – Dun Laoghaire Rathdown County Council
Keith McDonald – Extreme Ireland
Kevin Moriarty – Fáilte Ireland
Kiela Brodigan – Fáilte Ireland
Celine Weldon – Guinness Storehouse
Michael McDermott – Le Cool
Paul O'Grady – Mercantile Group
Brendan Flynn – The Church
Vera Stedman – Tourism Ireland

Culturally Curious Working Group

Eugene Garrihy – Dublin Bay Cruises
Sinead Connolly – Dublin City Council
Kevin Kidney – Fáilte Ireland
Orla Carroll – Fáilte Ireland
Eleanor Griffin – Howth is Magic
Irish Heritage Trust – Kevin Baird
Ann Daly – National Museums
Patrick Sutton – Smock Alley Theatre
Brian Twomey – Tourism Ireland
Peter Nash – Tourism Ireland

The Working Group and the strategy development process was facilitated by MCCP-The Planning Agency, Dublin.

APPENDIX E

Perceptions of fear in Dublin city centre

Perceptions of fear in Dublin city centre

Introduction

Every survey of consumer views undertaken in Dublin city centre re-affirms a wide spread view that people visiting the city feel a sense of unease or fear. The survey that most clearly articulated these concerns was the 2011 "Your City Your Voice", conducted by Dublin City Council. This survey showed that for 36% of people issues relating to anti-social behaviour particularly drug related anti-social behaviour was the aspect of the city they disliked most.

Despite a number of co-ordinated efforts, the negative perceptions of Dublin persist and are supported by media comment which in the main re-enforces the view that Dublin city centre is a threatening environment.

The latest instalment of Your City Your Voice in August 2013, notes that only 29% of the public believe that Dublin is a safe place for girls. 75% say they feel safe by day while 35% say they feel safe by night. These figures are consistent with previous findings and compare poorly to the findings of similar surveys conducted in UK cities. For example, in the city of Liverpool 99% of people feel safe by day and 78% feel safe by night. Indeed, 99% of Dubliners in Dun Loaghaire Rathdown feel safe in the neighbourhoods by day while 80% feel safe by night.

Simply speaking we need to achieve the same levels of comfort for Dublin City as has been achieved in comparable and competitor cities. Liverpool did not always enjoy a positive reputation. They began a co-ordinated campaign to improve the perception of the city in advance of being awarded the city of culture status in 2004 and have transformed the image of their city through integrated programmes addressing actual crime and fears and perceptions among the general public. If they can alter perceptions of their city we can surely do the same in Dublin.

Perception and reality

It has to be said that statistics would suggest that Dublin is a safe city. In 2012 there were 22 assaults on O' Connell, a street that has an annual footfall of 29m. While 22 assaults is always going to be 22 too many, it has to be recognised that it is less than 1 in a million on the street. Media commentary would have one believe that O' Connell Street resembles Beirut during the Lebanese civil war which is simply far removed from the truth.

In fact by international comparisons Dublin would rank as safe in terms of assaults,

muggings and thefts from the person. The levels of these crimes in the city are sufficiently low as to not register where perceptions of safety are concerned. Indeed, within Dublin, stories of friends or family being randomly assaulted or mugged do not feature in general conversation and this is because these events are extremely rare.

However, we must accept that negative perceptions about the city are widespread and genuinely held and as long as those perceptions pertain those of us with responsibility within the city have a clear job to do. There is no merit in telling the population that they are wrong to feel uncomfortable, intimidated or indeed frightened in the city, to do so will merely leave us open to the charge of being out of touch with reality.

To be successful in changing negative perceptions of the city we must address why those perceptions persist.

Drug related anti-social behaviour

In the latest version Your City Your Voice people were asked to note the first word that they would associate with Dublin. 9%, practically one in ten, said "junkie" or a variant of it. There is an association in the mind of the population between drugs and the city. This cannot be unexpected. There are regular gatherings on both sides of the river of people who are engaged in problematic drug use. There are regular and open trades of prescription medication which as far as the public is concerned is of illegal drugs. We also have public defecation on the streets both during the day and more so at night.

There is also the fact that people are seen in highly intoxicated conditions throughout the city. They are loud and boisterous and look the worst for ware. This is not necessarily something that the Gardai can prevent, however, scenes of congregation, intoxication and street dealing instils a degree of fear amongst the public.

Begging

Visitors to the city can expect to be targeted by beggars. After the introduction of begging legislation in February 2011 there was a reduction in the level of begging however, this trend has now been reversed and the 2011 levels have now been surpassed. From Wednesday to Saturday every ATM in the Grafton Street area will have a beggar in attendance. We have noted that beggars at ATM's are no longer sitting passively but have begun to seek engagement with people using the ATM. There is no doubt that this can be intimidating. We have also noted an unwelcome level of aggression in begging on the streets, where beggars approach members of the public and request a specific amount of money and ask for this money for a sustained period of time. They are not accepting no as an answer. Again this instils fear amongst the public. Patrons of public houses standing outside of the premises can expect to be asked for money by a beggar once every five minutes on average. Again this tends to be persistent begging. Any seating area outside a restaurant or café is also seen as fair game. There is evidence that tourists are being singled out and targeted by beggars and there is no doubt that this is creating a very poor impression of the city and may help to explain why repeat visit levels are lower in Dublin than competitor cities. Our ambassadors are being asked questions about the incessant begging by tourists, most particularly by passengers on cruise ships.

Solutions

We accept that resolving these issues is not entirely in the control of the Gardai, while the Gardai do have an important role to play. We believe that the drug issue in the city must be treated primarily as a health issue and that is why with DCC, HSE, Gardai and drug and homeless service providers we produced a report "Better City For All" in 2012. An implementation group was established in September 2012 to roll out the report's 60 recommendations. A copy of the report is available from the BID website.

Successful city transformations such as New York and Liverpool followed many of the principles outlined in the Better City For All recommendations. We believe that if fully implemented this report could have a significant impact on perceptions of the city.

A key finding of the better city for all process is that the concentration of large facilities in the city centre dealing with drugs and homelessness has facilitated the levels of anti-social behaviour noted above.

We were extremely disappointed and concerned when Dublin City Council, an important partner to the process opened Cedar House, a 50 bed homeless facility in on Marlborough Street.

Prior to the opening of Cedar House, we had detected a significant improvement in drug related anti-social behaviour in the general area. It was very evident in a Prime Time programme earlier in the year that Garda actions were being effective. In the Prime Time programme a number of drug users noted that they wouldn't bring drugs into the district as they believed Gardai would detect them and confiscate them. BID members commented to us that they had noted a marked improvement in the situation. However, this has fundamentally changed. We are now detecting four times as many needles in the area suggesting a significant increase in drug activity. We have photographic evidence of drug users congregating in the area and drug dealers supplying drugs to residents and non-residents of Cedar House. Business observations of drug related activity is now wide spread again. An organisation dealing with recovering drug addicts also advised that their clients are being targeted by drug dealers. This was not previously the case.

Our members are despondent and are noting that the situation is as bad as it ever was. The National Theatre has experienced a significant rise in anti-social behaviour around its premises. There is interest in significant development on Marlborough Street which with the additional of luas and redevelopment of the Abbey Theatre could lead to a very attractive area. At present and with the maintenance of Cedar House it will remain a no go area 100 metres from O' Connell Street.

The above enforces the view that this situation cannot be addressed entirely through policing actions alone. The concentration of services within the city centre has created unintended consequences which we have to manage and this needs the constructive engagement of all partners.

While the policy of placing the city and country's problems within the commercial/tourist core of the city remains it seems improbable that perceptions of the city will improve.

Anti-Social Behaviour Orders (ASBO's)

We welcome the securing of 5 ASBO's by Store Street Gardai. Based on experience in the UK, we would advocate the securing of additional ASBO's, thereby excluding persons whose behaviour within the city negatively impacts on the ability of others to fully enjoy the city. It is an unfortunate fact that those who have created the widely held negative impression of Dublin constitute a tiny minority of those in the city. We estimate that approximately 100-200 people are involved in behaviours that create difficulties for others. This is within the context of a city that has an average daily footfall of 328,000. Thus 0.03-0.06% of those in the city are causing distress to the remaining 99.95%. The question has to be asked is it acceptable that such a small number of people have such a disproportionate impact.

It should be noted that it is easier to secure

ASBO's in the UK. Cities such as Liverpool note that ASBO's are a key tool in their armoury in dealing with unacceptable behaviour. This would include those who persistently drink to excess and come to the attention of the police. We would recommend that ASBO's be imposed by a Garda Chief Superintendent without recourse to the Courts.

We would advocate ASBO's for both drug related anti-social behaviour and aggressive/ persistent begging.

We accept that prima facia, people may feel that ASBO's are draconian but in research conducted by Dr. Susan Fitzgerald from University of York it was found that the serving of ASBO's when matched with service provision actually benefited the majority of recipients.

This is in large part due to the fact that ASBO's help break up larger congregations of vulnerable people who can be used by members of the group for involvement in crime and prostitution.

It is also argued that in many cases there is a need for punishment of persistent difficult behaviour but a prison sentence is not always the best solution. ASBO's merely exclude individuals for a period of time from specific and defined areas of high footfall but they are free to get on with the rest of their lives. The ASBO is only served after 3 formal Garda warnings within a 6 month period so the person concerned can safely be assumed to be in fairly constant breach of acceptable behaviour. Based on the number of difficult people, 50-

60 ASBO's would dramatically impact on the public perception of the city. Based on these numbers it would be very feasible to provide care workers to work with the individuals concerned to point them in the direction of supports that are available. Again, this approach has been shown to work in the UK & USA. The final point that I would make in this context, is that on a visit to Tiglin Rehabilitation Centre we met a man that we

recognised. He had decided to seek help in sorting out his life after being served with ASBO warnings. He is now drug free. Stories like this are more common than one would think. A prison sentence is likely to have merely intensified his drug addiction.

Diverted Giving

BID has established a campaign in which members of the public are encouraged to provide funding to registered charities rather than to beggars on the street. The simple message in this campaign is for the public to know where their money is going. Money given on the streets may be going to professional beggars – we estimate that the majority of street beggars in Dublin are professional, or it will be used to buy drink or drugs. Would you purchase heroin from a criminal for the use of a drug addict, knowing those drugs are killing them? Then why give them the money to do so?

We have designed posters, beer mats and collection boxes for distribution to relevant businesses. We are also working in conjunction with the Gardai, Ana Liffey Drug Project, Coolmine, Tiglin through Business in the Community in a scheme to provide employment opportunities to people who have come out of rehabilitation programmes.

Businesses, particularly in the hospitality industry in both the BID and Temple Bar will support this campaign. We will renew it within the coming weeks.