

National Diaspora Centre - Feasibility Study

April 2013

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Executive Summary

For a number of years now, there has been growing recognition of the importance of the Irish Diaspora in the cultural, political and economic development of Ireland - Northern Ireland and the Republic, as well as in host communities. This recognition has come at a period in which cultural tourism is growing rapidly worldwide and is of particular significance. It is also a period in which there seems to be a weakening of kinship ties to Ireland, through ageing of first and second generation emigrants, particularly from the very important North American visitor market. There continues to be interest in genealogical research and in academic diaspora studies in which Ireland, as the country with the largest overseas diaspora compared to its native population, has taken a leading part.

The Government has taken the position that a National Diaspora Centre is desirable. An apparent opportunity to establish an Irish Diaspora Centre has led to a number of preliminary proposals being put forward for development, mainly by public sector bodies. Fáilte Ireland has been tasked to consider whether a National Diaspora Centre is feasible and, if so, what parameters need to be considered, financially, operationally and about location. An Advisory Group, under Chairman John Bowman, set out a series of challenges to be investigated by the Feasibility Study. Following competitive tender, Event Communications with CHL Consulting was appointed to carry out the study.

The study team consulted with stakeholders, parties interested in the project and potentially affected by it, including the existing genealogical industry, institutions with genealogical resources and promoters of versions of the National Diaspora Centre. Desk research established market opportunity. Competitive and comparative bodies were analysed. An outline exhibition concept gives a basis for operational and financial models, as well as giving flesh as to how the National Diaspora displays might be approached. It opens with a focus on the lives of the present diaspora, the major events of the historic diaspora in host countries, challenges encountered and the social, political and economic impacts of the Irish abroad. This approach is considered appealing to its potential visitor markets and avoids conflict with famine/emigration-related presentations.

A National Diaspora Centre appears to be a significant opportunity to add a c.250-300,000 visitors p.a. to Ireland's tourism product which would have strong appeal to the Irish Diaspora, to overseas visitors to Ireland and to the local Irish Market. It could provide a focal point for the fragmented genealogical market and a centre for contact with and from the Irish Diaspora, strengthening ties to mutual advantage. To achieve this result a project of substantial scale needs to be developed. This could be approached in a number of different ways, as a new build landmark attraction or inserted into an existing building. Exhibitions must be of international standard with appropriate quality and number of staff. The location needs to be suited to the level of visitation and access.

The financial appraisal indicates that the centre could operate sustainably on a revenue basis. Use of an existing building and sponsorship would reduce the capital required appreciably. There is an option of installing a reduced exhibition in an existing facility or institution in the event that total available funds are €5 million or less.

At a time of increased emigration from Ireland, the National Diaspora Centre could help to recast the relationship between Ireland and its diaspora, by developing key linkages and resources. It has the potential to enhance the image and appeal of Ireland, both at home and abroad, not just for the benefit of tourism but also for economic, academic and socio-cultural benefit.

Introduction

The Medium Term Exchequer Framework (Infrastructure and Capital Investment 2012-2016) published in November 2011, noted that *'in terms of iconic projects, support will be given to a Diaspora Centre or Diaspora Museum should a suitable project and partner be available'* (p24). Since then, a number of project proposals have emerged laying claim to the title National Diaspora Centre. As a result, Fáilte Ireland was asked by the Minister of Transport, Tourism and Sport to carry out a scoping study on the development of such a centre and the most suitable means by which it could be financed, developed and managed. This report, prepared on behalf of Fáilte Ireland by Event Communications with CHL Consulting, is the outcome of that study.

Context for this study

The question of creating a Diaspora Centre reflects a number of developments and themes that have emerged in recent years. The announcement in 2011 of *The Gathering 2013*, and subsequent work since then on project implementation, has served to remind us of the unique national attribute and asset which is represented in the global Irish Diaspora. The advent of digitised census data, and the increasing availability of such data on-line has accelerated an interest in genealogy across many countries, and has made meaningful the concept of 'genealogical tourism'. These trends have been reinforced in the broadcast media where ancestry, genealogy and roots have emerged as the foundations for a new programme genre.

The growing international interest in ancestry and genealogy, and the fact that for many decades Ireland has been a country from which people have emigrated, provide a contextual setting within which the development of a Diaspora Centre is now being considered.

Basic proposition

The immediate intention in this project is that while such a centre may act as a focus for those with an interest in the Irish Diaspora, more importantly, it must in its form and function serve as a significant attraction, contributing to the further development of Irish tourism. The centre should be of a scale commensurate with the weight of its subject, underscoring the importance of the diaspora to Ireland. It should be flexible in design and have the capacity to address the needs and interests of a broad community of users. It should also facilitate the development of links with and within the diaspora, including the fostering of networks within the academic, educational and business communities.

Brief

Event's brief from Fáilte Ireland was to scope out what a National Diaspora Centre could and should offer in terms of meeting its goal as a major tourist attraction and driver of tourism.

The tender outlined a number of challenges to be addressed. Identified by an Advisory Group convened by Fáilte Ireland in 2012 and chaired by John Bowman, these include:

- Definition
- Location
- Creative Commons
- Future Proofing
- Sustainability
- Dispersal
- Form and Function
- Market
- Brand
- Funding Model
- Business Model
- Stakeholders
- Governance and Management
- Comparator Benchmarking

Study Methods and Timeframe

Stakeholders to be consulted included a broad range of bodies and individuals involved in the genealogical sector, as well as Diaspora Project Proposers. Further consultees were selected by the project team in consultation with Fáilte Ireland, and these are included in Appendix 1.

Market analysis and comparative benchmarking were undertaken through research, investigation and consultation. The issues and parameters that emerged have informed the development of an outline Diaspora Centre concept. A financial assessment of the proposed project was developed.

This study was carried out between January and April 2013. Event and CHL would like to extend their thanks to everyone who so generously gave of their time and ideas during the consultation process.

Market Environment

Background

Ireland occupies a unique position in the pattern of emigration worldwide because of the numbers of its emigrants relative to the total population of the country.

For over a thousand years, Irish people have left this island to seek a better life or to bring their vision of the world to others. Their stories are part of one of the truly defining narratives of Irish history – the Irish Diaspora. People from all segments of the Irish community who made up this diaspora played integral, even pivotal, roles in the history of many nations: the United States, Australia, Canada, Britain, New Zealand, Chile, Argentina and Brazil, as well as in the countries of Europe and in many locations at less than national level. The ‘Irish Empire’ is a patchwork quilt of individual lives, success and failure, wealth and poverty, achievement and vulnerability, hero and villain. These lives impacted often unexpectedly on the cultures with which they made contact.

This is a story worth telling.

Market Environment for a National Diaspora Centre

According to Mark Boyle and Rob Kitchin at NUI Maynooth, ‘Ireland’s relationship with its diaspora is now in unchartered territory’¹.

‘For much of its history, the relationship between Ireland and its diaspora has been characterised by flows of support from the diaspora to nationalist political movements in Ireland and flows of remittances from the diaspora to impoverished families in Ireland. Indeed, many of the seminal moments in Irish history have been shaped by, and occasionally even triggered by, political, military, financial, and soldiering initiatives sponsored by the diaspora. And in its darkest hours were it not for migrant remittances it is indisputable that Ireland might have been visited by greater poverty and starvation. But times have changed. The peace process in Northern Ireland has calmed political activism in the diaspora, the emergence of Ireland as an advanced economy (notwithstanding the crash) has removed the need for remittances, and with socio-economic advancement and a historically unprecedented prominence in their (new) countries of residence, the Irish Diaspora has new concerns, resources, motivations, tastes, and capacities.

Against this backdrop, the Irish government has been revisiting and refreshing its relationships with its overseas communities for nearly 20 years now.

¹ Boyle M and Kitchin R (forthcoming) A diaspora strategy for Ireland (Publisher TBC)

President Mary Robinson’s lighting of a candle in a window at Áras an Uachtaráin in 1995 in solidarity with the Irish worldwide marked the beginning of a new phase in diaspora-homeland relations. Since then the Irish government has steadily scaled up its capacity to interface with the Irish abroad and rolled out a number of programmes. Landmarks include the 2002 Task Force on Policy Regarding Emigrants which mapped the extent and geography of the Irish Diaspora, identified the scale and nature of the welfare needs of vulnerable emigrants, and provided a roadmap for affirmative action in their support. In 2004 the Department of Foreign Affairs established the Irish Abroad Unit which has in turn administered Ireland’s pioneering Emigrant Support Programme. In 2009 the Global Irish Forum held at Farmleigh led to the establishment of the Global Irish Network. The Gathering, a tourism-led campaign designed to encourage all those who consider themselves part of the Irish Diaspora to visit during 2013, constitutes another milestone.

Throughout, the Irish government has undertaken periodic consultations with stakeholder groups with a direct interest in diaspora strategising. As the country’s highest profile and most symbolic event of 2013, the Gathering has the potential to amplify this conversation and actively incorporate the views of the wider public. The furore which followed in the wake of Gabriel Byrne’s criticisms of the Gathering in November 2012 suggests that there is an appetite for debate. Given that Ireland’s diaspora strategy remains at an embryonic stage, a public conversation would help the Irish government to generate and harness an untapped pool of creative ideas, promote greater awareness and more effective consultation, maximise buy-in and participation, allow concerns and problems to be aired and pre-emptive and remedial actions to be taken.

The Irish state is approaching its centenary and now is the time to take stock of the country’s journey thus far and the possibilities which lie ahead. With over 1 million Irish born citizens and 3.1 million Irish passport holders living overseas, and with 70 million people around the world claiming Irish heritage, Ireland has the largest diaspora in the world in relation to its population at home. Given the central role of emigration in Irish history, and the waves of emigration which have marked the past 100 years, the status, meaning, and implications of the idea of the global Irish family are a core resource for Ireland’s future.’

This thinking has formed the context for the creation of the National Diaspora Centre. In many respects its success will be based on it becoming more than a tourism project. *The Gathering*, which began as a tourism project has become a domestic engagement and a conversation with the global Irish, as well as an international tourism drive. There is also a belief that the National Diaspora Centre (NDC) may have a role to play in the legacy of *The Gathering*.

Market Environment

Key Markets for the National Diaspora Centre

The key markets identified for analysis are:

- The Global Irish Diaspora Community
- The Existing Overseas Tourism Market
- The Domestic Tourism Market
- The Genealogy Market

The Global Irish Diaspora Community has been identified as a key market on the basis that the story to be told is their story. Genealogy is a route by which those living outside their country of origin can reconnect with their ancestral home – one aim of the NDC. This sector was identified in the tender documentation as having untapped tourism potential. In order to be sustainable the NDC must attract the visitors that are already choosing Ireland as a destination so that it can achieve reasonable numbers from the first year. In a market as small as Ireland, the NDC must also be a compelling attraction for the domestic market living on the doorstep.

The Global Irish Diaspora Community

There are frequent references in documents about the diaspora to an estimated 70 million people globally who claim Irish heritage or ancestry. Of this 70 million:

- Over one million people born in Ireland are living overseas (estimates vary with some as high as 1.2 million)
- A further estimated 3.1 million Irish citizens/passport holders living overseas are entitled to citizenship through parents or grandparents.
- The commonly used figure of an Irish Diaspora of 70 million has been estimated from census statistics in countries where Irish communities are most numerous and where the census allows for ethnic origin to be indicated. It is impossible to get a complete picture. The most accurate statistics come from the US, Canada and Australia. Very little hard information is available for the rest of the world. Based on available data, it appears that the actual figure for the Irish Diaspora may be between 60 and 65 million – see Table 1.

Table 1: Geographical Distribution of the Irish Diaspora

Country	Approx. population of Irish Descent (millions)
United States	34.7
Britain	14.0
Canada	4.5
Australia	2.0
Mainland Europe	3.0
Rest of World	4.0 – 7.0
Total	62.2 – 65.2

Profile of the Irish Diaspora by Region (Figure 1)

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United States

- By far the largest Irish Diaspora is to be found in the United States.
- The number of US residents claiming Irish ancestry:
2010: US Census 34.7 million (144,588 Irish born).
2000: US Census 30.5 million
1990: US Census 38.7 million
1980: US Census 40.2 million.
- America's ethnic make-up is changing and there is some debate about whether the Irish connection is weakening or getting stronger. The census does not record generational levels and whether those who are 3rd, 4th, 5th generation Irish maintain that strong sense of Irish heritage or if they even respond to having Irish ethnicity. This is important to consider when looking at the American Irish Diaspora market. As more generations pass, the Irish Diaspora in America appears to shrink as the Irish connection becomes more removed – indeed, this likelihood is borne out by successive U.S. censuses, as indicated above.
- According to the CSO Estimates of Destinations of emigrants, 1987-2001, there was an increase in the number and proportion of new emigrants choosing to go to the USA in the 1990s. This was primarily as a result of visa lottery programs. The movement reached a peak in the years 1994-95 when over 10,000 of the 40,000 Irish emigrants went to the USA compared with 16,000 to Britain. But the burst was short-lived and returned to the 1988-92 proportion of around 12% of the total. By 2001 this was much smaller than the proportions going to Rest of the World (mainly Australia, Britain or Rest of the EU).
- Those of reported Irish Ancestry in the US represent a higher percentage of third level education, high school graduation, home ownership and median household income than the national average.

- The USA occupies a very different place in the Irish Diaspora from that of Britain. As a country of immigration, the USA openly encouraged entry from Ireland until the 1920s. There have been opportunities to move up the social, economic and political hierarchies to occupy key positions while retaining and proclaiming an Irish identity.
- Irish people in the USA tend to be concentrated into certain parts of the country. The large majority are in the most heavily urbanised and earlier-settled North-East States.
- The Irish immigrant and ethnic population in the United States is divided into many more groups with very different identities than the community in Britain. There is a far more visible and very large number of Irish Americans spanning several generations. In fact, however, the number of second-generation people is substantially smaller than in Britain where over 80% of 1950s migrants settled, so that many Irish Americans have more distant connections with Ireland.

Britain

- More than three-quarters of the Irish-born living outside Ireland now live in Britain.
- In the post-1945 period, Britain has replaced the USA as the primary destination.
- Although numbers declined from a peak of 957,000 Irish-born in 1971, the total was still high at 850,000 in 1991. In the 2011 census, 531,087 Irish-born were living in England and Wales.
- It is estimated that a further 1.7 million children have been born to Irish parents. Many second and third-generation children are raised with a strong sense of their Irish heritage, especially in large centres of Irish settlement.
- Figures on the Irish Diaspora in Britain vary widely and are in constant flux but there were an estimated 5 million people with an Irish parent or grandparent in the 1991 census, accounting for 10% of the population.
- In the 2011 Census, 606,000 people were Irish passport holders.
- A 2001 survey sponsored by Guinness suggested that 14 million people in Britain lay claim to Irish heritage though this is likely to be an exaggerated figure or at least going back many generations. The desire to claim Irish descent seemed most prevalent in the 18 – 34 age-group (42%).
- Much of the Irish Diaspora in Britain goes back only two or three generations. The family connection is often sufficiently strong that their visits to Ireland may be characterised as VFR (visiting friends and relatives) rather than diaspora tourism or tracing of ancestry.

- Britain occupies a distinctive place in the Irish Diaspora for a number of reasons which relate to the proximity between the two countries. As the closest destination Britain has attracted migrants who saw the move as temporary rather than permanent. Secondly, the political relationship between Britain and Ireland until recently left a legacy of distrust of Irish people as potentially subversive. Thirdly, Britain was an imperial centre for Ireland rather than a settler destination. Finally, educated Irish were not considered 'foreign' and easily assimilated into the professional, business and elite social communities.

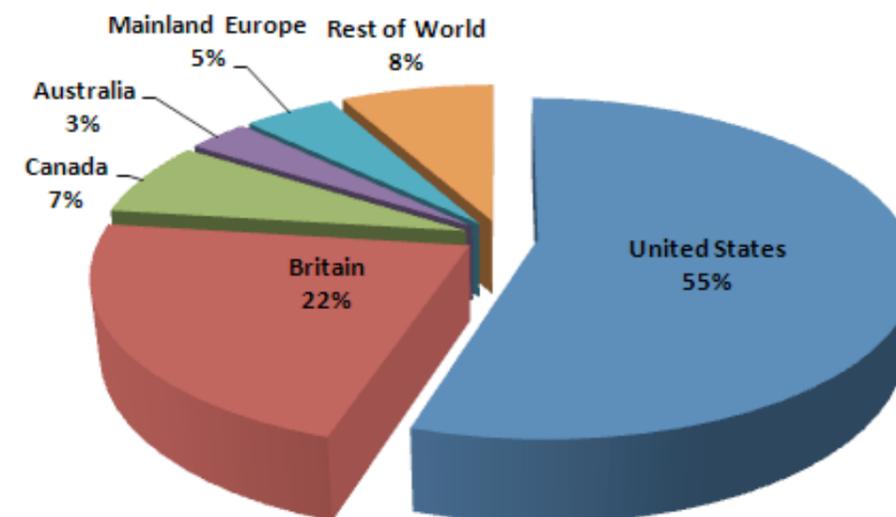
Canada

- The 2006 Canadian Census revealed that the Irish were the 4th largest ethnic group with 4,354,155 Canadians claiming full or partial Irish descent, representing 14% of the nation's total population. This may understate the Irish contribution to Canada's population, as many of those describing themselves as 'Canadian' in census surveys are thought to be largely of British or Irish descent.

Australia

- In the 2006 census, 1.8 million (9.1%) of the population claimed Irish ancestry.
- Australia has the third largest Irish-born population outside Ireland, after Britain and the USA.
- Throughout the later nineteenth and twentieth centuries, it has accounted for a small but remarkably steady proportion of Irish emigrants. In 1861 the census recorded 177,405 people as having Irish ancestry, 6.2% of the total in the four major destinations. This rose to 7.9% in 1891 but fell to 3.5% in 1951. However, as in other destinations with large nineteenth century immigrant populations, the number proclaiming Irish ancestry rose steadily and reached 803,372 by 1986.
- The relative importance of Australia as a destination for very recent emigrants has changed dramatically. In the annual emigration figures published by the CSO, Australia forms a large proportion of the residual category 'Rest of World' which rose from 13.4% of the total in 1987 to 40.7% in 2001.

Figure 1: Distribution of Global Diaspora



Mainland Europe

- Although there have been close connections between Ireland and European countries other than Britain for centuries, migration for employment on a significant scale is a very recent phenomenon (apart from the extensive recruitment of Irish soldiers in the 17th and 18th centuries.)
- As yet there is very limited information available on the destinations of Irish emigrants in Europe. This is partly due to scope of census data in Europe, where birthplace has often not been recorded.
- The most useful statistic comes from embassies in the 1990s for the Harvey Report which reported approximately half a million Irish-born people living in Europe, predominantly in France, Germany, Belgium and Spain. However, it is impossible to estimate the number of people of Irish descent living in Mainland Europe.

Rest of the World

- Other parts of the world which experienced some levels of migration from Ireland during the 18th, 19th and 20th centuries were Mexico, Argentina, Chile and South Africa. It is difficult to get a realistic picture of the number of people of Irish descent in these areas due to poor record keeping, assimilation into the local culture and generational distance.
- 19th century South Africa did not attract mass Irish immigration, but Irish communities are to be found in Cape Town, Port Elizabeth, Kimberley, and Johannesburg, with smaller communities in Pretoria, Barberton, Durban and East London. A third of the Cape's governors were Irish, as were many of the judges and politicians. Both the Cape Colony and the Colony of Natal had Irish prime ministers. A large contingent of Irish troops fought in the Anglo-Boer War on both sides and a few of them stayed in South Africa after the war. Others returned home but later returned to settle in South Africa with their families. Between 1902 and 1905, there were about 5,000 Irish immigrants. No records of immigration from Ireland were kept until the 20th century, but many of the Catholics of South Africa are Irish or of Irish descent and so give some indication of an Irish Diaspora. In 2003, statistics from Catholic Dioceses in South Africa recorded 3.8 million Catholics but it is most unlikely that all or even most of these are of Irish descent. On the other hand, this does not account for the Protestant Irish who may also be a substantial number.

- Argentina is home to South America's largest Irish community. The true numbers of Irish descendants is unknown due to poor record keeping during the early immigration wave. The fact that the Irish were counted as English until 1920 further confuses the issue. There are currently approximately half a million people of Irish descent reported though some reports put this number as high as 1 million.
- Chile has an English-speaking proportion of about 4.5% of the population, almost all of whom are of British or Irish descent. Unfortunately it is difficult to find a clear distinction between British or Irish ancestry in Chile. Of the 700,000 or so angloparlantes in Chile, half live in Santiago, 100,000 are in the Valparaiso-Viña del Mar area, and 200,000 are in Patagonia and the Lake District. The far south feels like an extension of angloparlante Argentina. In the southernmost region of Chile, the British/Irish population of 60,000 makes up 40% of the total. A bit further north, the Aisén region is almost 30% of British or Irish descent.

- The majority of Irish immigrants to Mexico were Catholic and arrived during the time when Ireland was under British rule. Mexican Irish communities existed in Mexican Texas until the Texas Revolution. Many Irish then sided with Catholic Mexico against Protestant pro-U.S. elements. The Batallón de San Patricio was a largely ethnically Irish battalion of U.S. troops who deserted and fought alongside the Mexican Army against the United States in the Mexican-American War of 1846 to 1848. In some cases, Irish immigrants or Americans left California (the Irish Confederate army of Fort Yuma, Arizona during the American Civil War in 1861) and blended into Mexican society. Today it is estimated that there are between 300,000 – 600,000 people of Irish descent living in Mexico City and the Northern region of Mexico.
- Many Irish people migrated to Uruguay from the 1700s up until the 1900s. There are currently approximately 120,000 people in Uruguay of Irish descent.
- Recent economic events have led to emigration to the Middle East and Asia though it is unlikely that these represent permanent migrants given the residency regulations of these countries.

Irish Diaspora Market Survey

A substantial number (32%) of overseas visitors to Ireland feel some level of connection or ancestral tie and is therefore worth pursuing as a target market segment. However, the profile of the Irish Diaspora is very varied, depending on where in the world they live and how far back their Irish connection goes. For example, Irish Americans consider their Irishness in the context of first being American within what developed as a migrant country. After Germany, Ireland has provided the second highest number of emigrants to the US.

The Irish story in South America is more removed from Ireland and assimilated into the local culture, yet a strong history remains particularly with regard to the military experience and revolutions. The story of the Irish in Britain is a very different and, for most, more recent experience. Not being so far away from the 'home country', the Irish Diaspora in the UK does not seem to demonstrate as much interest in seeking out its Irish connections in a touristic way. The Irish connection means very different things to different groups and therefore the question arises as to whether all these groups be catered to in a Diaspora Centre and, if so, how can this be done in a successful and meaningful way.

The Overseas Tourism Market

Overseas Visitors to Ireland

Total overseas tourism to Ireland peaked in 2007, with 7,739,000 visitors, and subsequently fell back sharply with 2010 seeing the lowest numbers experienced in a decade. However some ground has been made up since then. Britain is the largest source of overseas tourism followed by Mainland Europe. North America, including Canada, constitutes 15% of our overseas tourism market.

Profile of Existing Tourist Market (Figure 2, Table 2)

Britain

Britain is Ireland's biggest tourism market at 45% of total arrivals in 2011.

39% of British visitors come during the off peak season.

72% of British visitors make up the short break holiday market stays of 1 to 5 nights.

Dublin, the South West and Northern Ireland are the most popular destinations with British visitors.

60% of British visitors are repeat visitors. 45% of British visitors are interested in culture.

United States

In 2011, 70% of American visitors came between May and September.

71% of visitors from the US in 2011 were first time visitors.

33% of visitors from the US come on package holidays while approximately 29% book online.

83% of US visitors are interested in sightseeing and culture.

Canada

114,000 visitors in 2011.

42% stay 9-14 nights while 37% do a 1-5 night stay as part of a wider European tour.

75% of visitors in 2011 were first time visitors.

Highest proportion of ABC1s (92%).

Australia

132,000 visitors in 2011.

33% came during off-peak times.

Typical stay of 6-8 nights.

Tendency to travel widely.

83% of Australian visitors are culture seekers.

Mainland Europe

The highest numbers from Mainland Europe came from Germany and France with 420,000 and 400,000 visitors respectively in 2011.

Diaspora Visitors to Ireland

In the 2011 Survey of Overseas Travellers by Fáilte Ireland, it was found that 32% of overseas visitors had some ancestral family connection with Ireland, whether it was an Irish parent, grandparent or other ancestor (Table 3). Britain had the highest number of visitors who were born in Ireland or had Irish parents. North America had the highest number of visitors with Irish grandparents while North America and Australia had the highest number of visitors with older Irish ancestry.

Overseas Tourism Market Summary

Overseas visitor numbers are improving after a substantial drop off in 2010. Sightseers and culture seekers have been identified by Tourism Ireland as the strongest prospect tourists from Britain, US, France and Germany. The success of a Diaspora Centre in terms of visitor numbers would be dependent on engaging not only the 32% of overseas visitors with Irish heritage but also the 68% who have no connection with Ireland but seek an Irish cultural experience.

Figure 2: Profile of Overseas Visitors to Ireland, 2011

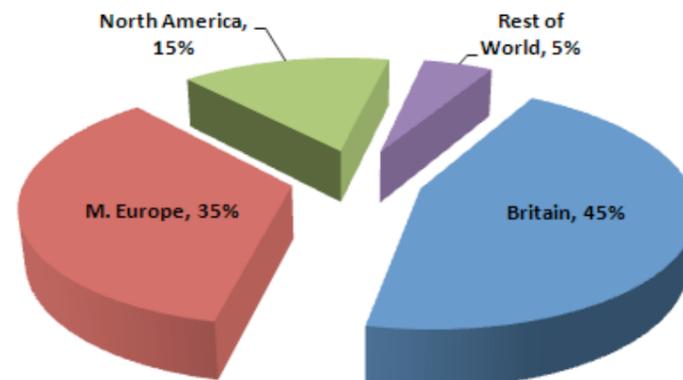


Table 2: Overseas Visitors to Ireland, 2009-2011 (000s)

Market	2009	2010	2011
Britain	3,034	2,759	2,825
Mainland Europe	2,323	2,011	2,231
North America	920	864	917
Rest of World	301	311	352
Total	6,578	5,945	6,325

Source: Fáilte Ireland, 2012

Table 3: Survey of Irish Connection of Overseas Visitors, 2011 (%)

	Britain %	N. America %	M. Europe %	Australia %	All Visitors %
Born Here	25	11	6	20	15
Parent Born Here	11	5	1	4	6
Grandparent Born Here	6	10	1	4	4
Any Ancestor Born Here	6	21	1	23	7
No Personal Link	53	52	92	49	68

The Market for Genealogy

Overview of Genealogical Tourism

An estimated 92,000 overseas visitors engaged in tracing roots/genealogical activities in 2011 (Table 4). This is a reduction from the 2009 figure of 120,000. These figures are derived from the Survey of Overseas Travellers conducted by Fáilte Ireland. The findings however may not give a particularly accurate picture as they are taken from a small sample. Moreover, the questions asked in the survey did not give any detail on what level of genealogical interest the visitors had. North America was the most important market for this activity in 2011, accounting for more than half of such visitors.

- Over the three year period from 2009 to 2011, North America (the USA and Canada) produced the greatest number of genealogical tourists at 133,000, followed by Britain at 95,000. Mainland Europeans showed the lowest interest at only 25,000, whilst 49,000 were visitors from other parts of the world.
- The total number of recorded visitors engaging in genealogical activities over three years was a meagre 302,000. The total number of overseas visitors to Ireland during this same period was 16,899,000; therefore visitors recorded as having engaged in genealogical activities during their stay accounted for only 1.7% of total overseas visitors.

As shown in Table 5, the number of genealogical tourists as a proportion of total arrivals is highest for the Other Overseas and North American markets. A very small proportion of British tourists is interested in this activity. This is indicative both of the profile of the British Diaspora, discussed in Section 2.3, and of the consumer behaviour of our British Tourists, almost three quarters of whom engage in short break holidays in Ireland.

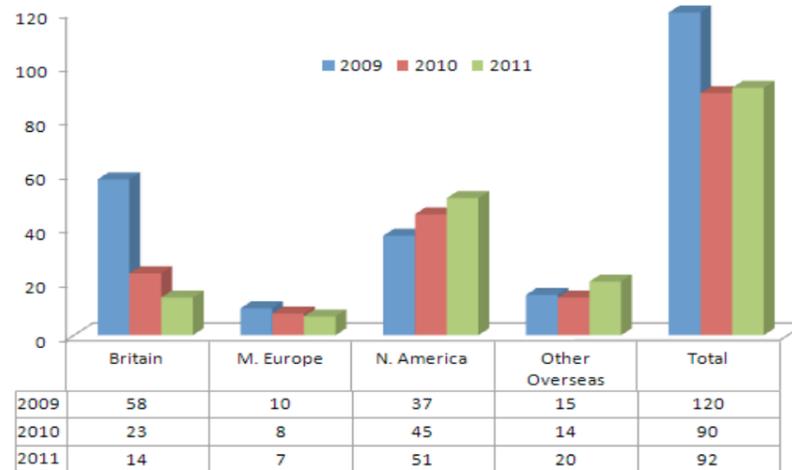
It is also important to bear in mind that very little detailed research has been conducted into the number of visitors tracing ancestral roots. There are also many visitors who do in fact have an Irish connection, be it an Irish parent, grandparent or an ancestor from further back, who do not actively engage in tracing their Irish links but may be interested in other facilities or events that a Diaspora Centre may provide, or in a fun form of genealogy.

See Appendix 3 for providers of Genealogical services in Ireland.

Genealogy Market Summary

- The genealogical market currently represents a very slim segment of our overall market and therefore it would be very hard to justify making this the primary focus of a Diaspora Centre. If anything, genealogy represents a niche market within the broader cultural tourism sector.
- While there is a broad range of primary genealogical sources available, it is difficult for a genealogical tourist to know where to find them and there is a need for a coherent pulling together of the various sources of records.
- Genealogical tourism could be further encouraged through a more user-friendly system of accessing records.
- There is already a range of online genealogical resources. It seems to make sense to have one main portal that would accommodate all the different sources of records in digitised format. www.findmypast.ie is already moving in this direction, and both www.rootsireland.ie and www.genealogyireland.ie have ambitions to be portal sites. This throws up the question as to whether there is a gap in the online space to be filled by a Diaspora Centre or even if this should be the role of a Diaspora Centre.
- There is a need for standardisation across the sector in terms of fees and level of services.
- There is agreement within the genealogical sector that mere access to records is not enough. Due to the number and complexity of Irish records, interpretation is crucial and there is a need for trained genealogists to guide visitors seeking their ancestry.
- A visitor who has travelled specifically to trace their ancestry is likely to want to see more than a digitised record. They may want to see originals to get a feel for their story. The National Library can provide this and can also advise the visitor on where to look next through their genealogical advisory service. The national network of county genealogy centres affiliated to the Irish Family History Foundation provides personal advisory services at county level.
- The National Library currently provides the principal central advisory service to the genealogical tourist and is best positioned to continue to do so, given that they, together with the National Archives, are the main keeper of documents and archives. They are currently the main hub of genealogical research in Ireland and arguably should remain so. This raises the question of whether there is a gap in the genealogy market. What can a Diaspora Centre provide to the genealogy market that is not already there?

Table 4: Overseas Visitors with an Interest in Genealogy, (000s)



Source: Fáilte Ireland Survey of Overseas Travellers

Table 5: Genealogical Tourists as a % of Overall Visitors, 2009-2011

	2009	2010	2011
Britain	2	>1	>1
Mainland Europe	>1	>1	>1
North America	4.2	5.4	5.6
Other Overseas	5.7	5.2	6.2

The Domestic Market

Overview

The domestic market is hugely important not only in terms of visitor numbers and expenditure but also in terms of involving the Irish at home in the Irish Diaspora debate and the on-going story of the Irish abroad.

In 2011, just under 9 million overnight trips were taken by Irish residents within the Republic (Table 6), with an associated expenditure of €1.8 billion. Total expenditure by overseas visitors (including Northern Ireland) for the same year was €3.2 billion; thus the domestic market yields a considerable proportion of overall tourism revenue. It is also worth noting that, while overseas visitor numbers have decreased since 2007, domestic trips have increased.

Domestic visitors are also more likely to be repeat visitors to a Diaspora Centre particularly if there is an on-going programme of events, educational resources and family appeal.

The people of Ireland will be key influencers in introducing the NDC to its overseas visitors.

Engagement of Domestic Tourists in Culture / Heritage Attractions

In 2011 6% of domestic tourists cited culture/history as a reason for choosing a holiday while 9% travelled for a specific event or festival. However in both 2010 and 2011, 14% of domestic holiday makers visited a heritage or interpretative centre, and 13% visited a museum or gallery in 2011.

Domestic market visitation at cultural attractions varies considerably from site to site. For example, in 2011, only 7% of visitors to Ireland's number one attraction, the Guinness Storehouse, were from the domestic market. In 2012, 30% of The Dunbrody Famine Ship Experience were domestic visitors. At the Ulster American Folk Park in Omagh, 68% of visitors in 2010 were from Northern Ireland. Attractions which are family-oriented tend to attract a higher proportion of domestic visitors compared with those that do not have family appeal. Potential domestic visitor numbers will very much depend on the form and function of an attraction and will also rely heavily on a programme of changing exhibitions and events. A strong education programme and family appeal can boost domestic visitor numbers and go some way to keep visitor numbers up during the off peak times of year when overseas visitor numbers are relatively low.

Table 6: Consumer Behaviour of Domestic Tourism, 2008-2011

	2008	2009	2010	2011
Overseas Visitors	7,436	6,578	5,945	6,326
Northern Ireland Visitors	636	985	1,189	1,304
Domestic Trips	8,339	8,340	8,614	8,994

Cultural Tourism and Existing Attractions with a Diaspora Theme

This section of the study looks at existing organisations in Ireland that tell a piece of the diaspora story to determine whether there is a gap in the market which could be filled.

Cultural Tourism

When looking at existing overseas tourism as a market for a Diaspora Centre it is relevant to look at it in terms of cultural/heritage tourism and what proportion of existing leisure tourists have an interest in engaging in cultural activities while staying in Ireland. Currently, approximately 83% of overseas visitors cite culture and heritage as a reason for choosing Ireland as a holiday destination.

In 2011 an estimated 3.5 million overseas visitors engaged in cultural activities while in Ireland, including visits to places of historical/cultural interest and gardens, attending festivals/events and tracing roots/genealogy. Overseas visitors who engaged in cultural activities spent an estimated €2.8 billion while in Ireland. Mainland Europe is a key market for this cultural heritage product, accounting for 43% of those visiting cultural/historical attractions. Visitor numbers at National Cultural Institutions are shown in Table 7.

Table 7: Visitor Numbers at Selected Cultural Tourist Attractions, 2009-2011

Name	Location	Visitor Numbers 2011
Book of Kells	Dublin	524,119
Ulster Museum	Belfast	471,451
National Museum, Kildare St.	Dublin	402,582
National Museum, Collins Barracks	Dublin	295,488
Kilmainham Gaol	Co. Clare	294,095
Bunratty Castle & Folk Park	Dublin	275,986
Bru na Boinne Visitor Centre	Co. Meath	228,550
National Library	Dublin	206,342

Source: Fáilte Ireland, 2012

Historical/Cultural visits during 2011 comprised the following:

- Houses/Castles: 2.7 million visitors
- Monuments: 2.2 million overseas visitors
- Museums/Art Galleries: 1.9 million visitors
- Heritage/Interpretive Centres: 1.8 million visitors

It may be noted that almost all of these visitors will have engaged in more than one cultural visit during their stay.

Diaspora-Related Attractions

Ulster American Folk Park, Omagh

- An outdoor museum which tells the story of emigration from Ulster to America in the 18th and 19th centuries. Presented as a living history experience with costumed demonstrators and a series of buildings taking you through the experience.
- Admission: for adults £7.00, children £4.50.
- There are also collections relating to emigration.
- There were 167,000 visitors in 2010 with 68% of visitors to attractions in that year coming from Northern Ireland.
- An on-going programme of events and exhibitions complements the core exhibition.
- The site also houses the Mellon Centre for Immigration Studies which includes a library of books on migration history and also an Irish Emigration Database containing 33,000 primary source documents, passenger lists and letters. Up until 2011, this was only available to the library users but is now accessible online through the DIPPAM website <http://ied.dippam.ac.uk/>. (see 5.2)
- 2010 20,434 visitors
- 2011 20,475 visitors
- 2012 22,028 visitors
- Entry to the library is free and visitor numbers at Mellon Centre for Emigration are based on an electronic entry gate.

Jeanie Johnston Famine Ship, Dublin

- Guided tours of a replica of the Jeanie Johnston Ship which carried many Irish emigrants to North America between 1847 and 1855
- Admission and Tour Price: €8.50 for adults and €4.50 for children
- Also offers Segway tours of The Docklands and river tours.
- Disappointing visitor numbers for its first year with 17,500 visitors from July 2010 when it opened until November 2011. However, Fáilte Ireland says preliminary figures for 2011 show a 50% rise in visitor numbers at the tall ship over last year, with an average of 1,250 per month compared to 833 monthly in 2010.

Dunbrody Famine Ship and Irish Emigrant Experience, New Ross, Co. Wexford

- An interpretation of the Irish emigrant experience aboard a replica of an 1840's ship. The experience of what became known as 'coffin ships' includes guided tours, costumed performers and themed exhibitions.
- Admission price of €8.50 for adults and €5.00 for children.
- Irish America Hall of Fame.
- Irish Emigrant Wall of Honour, a memorial to the Irish Diaspora. For a 'donation' of €100, the names of ancestors can be carved onto the memorial.
- Irish Emigration Database (not to be confused with the Irish Emigration Database at the Mellon Centre compiled under the broader DIPPAM database). Since 2001, this database has been compiled by the JFK Trust as a comprehensive database of Irish emigration to the United States, in conjunction with the Balch Institute of Ethnic Studies in Philadelphia, the Ellis Island Restoration Commission in New York and the Battery Conservancy in New York. The database is compiled from the original Ships' Passenger Manifests recording Irish, English, Scottish, and Welsh immigrants arriving at the main US ports. Access to the database is free through this website: www.dunbrody.com/get-involved/irish-emigration-database Printouts are available for a small fee.
- Visitor numbers for 2012 were over 60,000. Of these 30% were domestic. Of the 70% of overseas visitors, half came from Germany, 27.5% from North America, 15% from the UK, 7.5% from France and the remaining 5% from other areas. It is hoped to increase the visitor numbers to 100,000 in 2013.

Kennedy Homestead, Dunganstown, Co. Wexford

- The Kennedy Homestead, birthplace of President John F. Kennedy's great-grandfather Patrick Kennedy, celebrates the story of five generations of the Kennedy dynasty. It is still owned by his descendants.
- A visitor centre was opened in 1999 but a new visitor centre is currently under construction by the OPW and is due to open in the summer of 2013.

The Famine Museum at Strokestown Park, Co. Roscommon

- Located in the original Stable Yards of Strokestown Park House, the Famine Museum was designed to commemorate the history of the Great Famine and provides a stark contrast to the lifestyle of the 'landlord class' residing in the main house. The Famine Museum displays unique documents that were discovered in the estate office, dealing with the administration of the estate during the famine years.
- Admission Prices: €8 per adult (one attraction only); €12 - combined House, Famine Museum and Garden; €5.00 per child (all 3 attractions).
- Visitor numbers are between 50,000 to 60,000 for general entry though not everyone visits the Famine Museum.

The Queenstown Story, Cobh, Co. Cork

- Cobh Heritage Centre presents the Queenstown Story, an exhibition of the story of emigration of 2.5 million people through the port of Cobh. It also chronicles Cobh's connections with the ill-fated Titanic.
- Adult admission price is €7.00. Children under 8 are free.
- They offer a genealogical referral service for €10 for 30 minutes.
- There is a wall of dedication for ancestors who passed through Cobh to Queenstown. Names can be engraved on-site for a fee or added to an online E-Wall.
- 2009 81,145 visitors
- 2010 78,642 visitors
- 2011 86,173 visitors.

Glasnevin Museum, Dublin

- Glasnevin Museum tells the story of Ireland's past through a celebration of the lives of the 1.5million people buried there.
- Adult admission price is €12, Children/Seniors/Students €8 and School Groups €6.
- They offer a genealogical service with a €3 charge starting point for online visitors. The entry ticket includes a complimentary €10 genealogy voucher and a number of computer terminals where you can begin your research.
- Visitor numbers of 50,000 in 2012 with c200,000 visitors to the genealogy website when it was launched but that number has declined dramatically.
- The challenge of encouraging visitors to Dublin to make the 3 mile journey from the City Centre to Glasnevin was highlighted during the consultations. This is an important point when considering the location of the National Diaspora Centre.

Cultural Tourism Market Summary

There is already a range of visitor attractions in Ireland which cater to the themes of emigration and famine, some more successful than others. What is important is that there does not seem to be a gap in the market for another visitor attraction which focuses on the grim history of emigration, coffin ships, and the Great Famine. This is not the story that needs to be told and the form and content of a future Diaspora Centre would need to take this into consideration.

International Diaspora Centre Comparators

A review of major international comparator institutions is given in Appendix 2.

Common features include:

Physical

- Core exhibition
- Events and temporary exhibitions
- Lectures and cultural events
- Educational facilities (schools)
- Conference facilities
- Café/gift store
- Genealogical research facility
- Memorabilia centre (visitors bring their stories to the centre).

Intangible/Virtual

- Visitor experience and connection
- Relevance and context
- Broad appeal
- Links to academic institutions
- Links to other diaspora attractions globally
- Connections with influential diaspora
- Links to genealogical services globally. Opportunity to bring together various archives, genealogical facilities and organisations in a coherent manner.
- Visitor interactive engagement is part of the experience.

The objectives of the Beit Hatfutsot Museum in Israel would appear to most closely reflect those of an Irish Diaspora Centre. The successful Ellis Island, Bremerhaven and Melbourne organisations are based on important historical sites with strong local and political support. It would seem useful to engage in dialogue with all of the above.

Overall Market Summary and Recommendations

It is evident from the analysis of the potential markets for a Diaspora Centre that it is not enough to cater primarily to visitors with an ethnic Irish connection. While this market would certainly be part of a target audience, a successful Diaspora Centre would need to have broader appeal and attract a proportion of the 68% of overseas visitors who do not have Irish roots. It will also be challenging when targeting the diaspora market to cater to the expectations of the very different diaspora profiles.

Cultural tourism is an expanding segment of the general tourism industry, with 83% of overseas visitors citing culture and heritage as a reason for choosing Ireland as a destination. A Diaspora Centre appealing to the general overseas visitor would tap into this expanding market segment.

The domestic market should also be targeted. Not only are the Irish at home part of the diaspora story, they could also form a crucial audience through a programme of events, changing exhibitions and a vibrant education programme.

There is certainly scope to use a Diaspora Centre as a platform to encourage more visitors to explore their Irish roots in a way that looks forward as opposed to the conventional emigration story. There is also an opportunity to forge greater connections with successful diaspora museums such as Ellis Island and the Immigration Museum in Melbourne, both of which have clear connections to the Irish story. These museums present the arrival of the Irish to their countries and how their stories unravelled there as opposed to Ireland which was the departure point.

SWOT Analysis for the Market Positioning of an Irish Diaspora Centre

Strengths	Vast Global Diaspora. Existing overseas and domestic markets already engaging in cultural tourism. Currently no facility in Ireland that shows the complete and evolving Irish story. Support from Fáilte Ireland.
Weaknesses	Very small genealogy market. Existence of already well developed genealogy services online. Diverse Diaspora profiles are challenging to engage with. Current economic climate and associated lack of capital.
Opportunities	Provide a new perspective on the Irish Diaspora as an on-going story. Provide a strong link with Irish and other Diaspora Centres globally. Enable the people of Ireland to be engaged with the global Irish Diaspora. Create an educational centre as a starting point of a global story celebrating Irish culture and how and why the Diaspora feel that Irish connection. Further develop the Diaspora community outside the US. With the largest visitor numbers coming from the UK, there is room to create a greater connection with the British Irish community through a Diaspora Centre. Develop links and share exhibitions and records with other organisations such as Ellis Island and Melbourne Immigration Museum. Academic links and conference potential.
Threats	Virtual and online services will to some extent dictate the format a physical Diaspora Centre should take. Already a range of visitor attractions in Ireland with a focus on emigration and the famine. The challenge to be relevant, forward looking and appeal to all markets and Diaspora groups.

Table 8 sets out some considerations regarding the content of the proposed Diaspora Centre arising from the market analysis.

Table 8: Potential Functions and Form of Centre

Markets	Content
General Overseas Tourist with no specific Irish connection	Programme of cultural events and changing exhibitions. Story of the Irish exhibition which is interactive. Hub for Irish culture and heritage, which will appeal to the culture-seekers.
Genealogical Tourist and visitors with any Irish connection	A small but potentially expandable market particularly from Britain. Genealogy Centre pulling together all the different resources available for tracing ancestry. A central genealogy centre offering interpretation of documents and advisory services.
Tourists with an Irish Connection	Exploration of the story of the diaspora. Exploration of Irish culture. Contemporary diaspora contact / interaction. A way to weave visitors' personal stories, memorabilia etc. into the exhibition. Links with all the Irish Diaspora Centres globally.
Domestic Visitor	Evolving story of the Irish and an interactive exhibition with means to enable visitors to contribute to the story. Cultural events (music, dance, poetry, cinema, etc.) from home and the Diaspora abroad. Temporary exhibitions relevant to the on-going story. Family events/exhibitions. Engage with children and younger visitors.
Virtual/Online	Bringing together of Records/Archives. Ability to interact with physical exhibition on-site by sending memorabilia/photos/documents online. Blog. Online exhibitions.

Target Markets

The NDC will target a very wide range of market segments as it is anticipated that it will have a wide market appeal. The selection of segments to be targeted will be influenced by the project content, by the national tourism agencies' priority target markets and by those market segments which are productive for the visitor attraction sector.

The domestic market will be an important source of business, especially in the early years. The domestic audiences will be drawn from the local catchment population and the domestic tourist market. Relevant segments include family and adult holidaymakers looking for a good day out, those with an interest in family history, those with an interest in Irish cultural heritage and identity, the education market (schools and colleges), and those who wish to enjoy the entertainment offered on site.

As previously noted, the NDC will need to attract a wider tourist audience than those interested in genealogy or having an ethnic connection to Ireland. The Centre should target the wider, and much larger, cultural tourism market. As referenced on Page 12, an estimated 3.5 million overseas tourists engaged in visits to places of historical/cultural interest and gardens in Ireland in 2011. These visits are broken down by type in Table 9.

Mainland Europe is the largest market for this type of product, accounting for 43% of those visiting cultural/historic attractions. However, Britain is by far the largest individual market, generating 28% of all visits to places of historical/cultural interest. Recent research on the important British market has identified three key target segments for Ireland of which the segment considered the warmest for Ireland is described as 'the Culturally Curious'. This segment which comprises an older, more educated audience, is interested in exploring Irish culture and will be an important target market for the NDC.

A second target segment in the British market called 'Social Energisers' is also relevant to the NDC: this segment comprises 'young, fun-loving urban adventurers' who would be drawn by the contemporary nature of the proposed exhibition including the use of social media for lively interaction.

The range of offerings at the NDC will be well suited to bespoke packages targeting niche markets including those with particular interests in different aspects of Irish culture and identity, which will be the subject of regular temporary exhibitions.

In addition to the immediate links with the main diaspora markets (North America, UK, Australia, New Zealand etc.), the cultural and identity themes of the NDC should attract tourists from the main European markets and elsewhere. Tourism Ireland Ltd. have also identified new markets with long-term potential in Asia, including India, China and Japan, which should be factored into the marketing strategy as the NDC establishes itself in the medium to long term.

Within the target markets, motivations to visit the NDC will include:

- cultural heritage and Irish identity
- Irish Diaspora history
- genealogy
- education and research in diaspora and cultural identity themes
- Irish traditional and contemporary arts.

The target markets and market segments for the NDC are summarised in Table 10.

Table 10: NDC - Key Markets / Target Market Segments

Category	Main Market	Target Segments
Catchment Population	Residents 0-60 mins	Families Special interests Schools, colleges Community groups General adult population (couples, empty nesters, retired).
Population within 100 miles	Republic of Ireland	Families Community groups Special interests (military historians etc.) Day tours Schools, colleges General adult population (couples, empty nesters, retired) Culture seekers Business / event tourists.
Domestic ROI / NI Tourists	Republic of Ireland Northern Ireland	Families City breaks/short breaks Genealogy Special interests (military historians etc.) Coach groups/tour operators Independent holidaymakers Culture seekers Business / event tourists.
Overseas Tourists	Great Britain Mainland Europe (France, Germany, Spain, Other) USA & Canada Australia/N.Zealand Other Overseas	VFR and genealogy City breaks/short breaks Culturally curious sightseers/culture seekers/heritage explorers Social energisers Cruise visitors Business / event tourists Coach tour groups Self-drive tourists/independent holidaymakers.

Table 9: Visits by Overseas Tourists to Places of Historical/Cultural Interest, 2011

Category	No. of Visits (000s)	Market Distribution %			
		Britain	Mainland Europe	North America	Other
Houses/Castles	2,666	23	46	23	8
Monuments	2,157	20	47	24	8
Museums/Art Galleries	1,969	23	46	24	8
Heritage/Interpretive Centres	1,833	21	46	26	8
Gardens	1,554	22	46	23	9
Festivals	510	33	36	21	10
Total	3,231	28	43	21	7

Source: Fáilte Ireland

Existing Embryonic Schemes for a National Diaspora Centre

This section outlines current project schemes for a Diaspora Centre at various locations around Ireland. These are listed in alphabetical order. The proposals are not assessed and are set out here for the study to be cognizant of their background and development to date.

Cork City Council

The concept put forward by Cork City Council is of a World Centre for Irish Heritage. This would include a substantial exhibition, a genealogy service (including DNA testing of visitors), and an education and research centre. The proposed themes of the exhibition broadly cover:

- the origins of the Irish people
- the inward influences from elsewhere
- the scattering of Irish people and their contribution to other countries.

The centre in Cork City would complement the Queenstown Story in Cobh, which deals with emigration, and the proposed exhibition on transportation to be presented on Spike Island in Cork Harbour. The original proposal was to locate the Cork City exhibition at the former Butter Exchange in Shandon. However, as this would be dependent on the wider regeneration of Shandon, the focus has shifted to the City Centre and docklands. Various buildings have been suggested, including the former Beamish & Crawford Brewery, the Port of Cork Company buildings, and other sites in Cork docklands.

In the absence of a defined location, the scale of the facility and its exhibition area are uncertain at present. The proposal for the former Butter Exchange envisaged attracting 300,000 visitors a year, and incorporated

- Diaspora exhibition: 1,508 m²
- Temporary exhibition space: 259 m²
- Butter Museum: 582 m²
- Education / research: 190 m²

The size of these spaces is dictated by the configuration of the building at Shandon, and the Butter Museum component is specific to that site. The use of an alternative location would probably result in a different scale of facility. A business plan has recently been commissioned by Cork City Council, with a view to targeting private and public sources of funding.

Dublin City Council

Dublin City Council has suggested two locations in Dublin to be considered as potential venues for the National Diaspora Centre. These are the Vat House Digital Hub site and the CHQ Building in the IFSC next to George's Dock. Both are brown field sites and have many of the required services in place.

The suggested sites have the flexibility to be developed as an information & research centre, an exhibition, a museum, an attraction or entertainment centre, or some amalgam of these. The sites could be developed in phases or clusters. One idea proposed is to create a partnership with John McColgan's World Irish (<http://worldirish.com>), an Irish online network which brings Irish people and those with an affinity for Ireland together, with the Diaspora Centre becoming the physical home for World Irish and its 51,000 members.

The Vat House Digital Hub Site

The Vat House Building (No.7) is located on a corner site at the junction of Crane Street and Rainsford Street in Dublin 8. It is therefore hoping to capitalise on the footfall to the Guinness Storehouse. The building, a former vathouse dating to 1860, was built as part of the extensive Guinness brewery complex. The building has lain idle since 1990 and is currently in the ownership of the Digital Hub Development Agency and there are extensive plans to develop their campus. The Vat House Building footprint is 313m² in its disused state. The shell of the building is in good condition. There is scope to create floor levels as required by the concept thus increasing the overall square footage.

Dublin City Council's view is that the Vat House Complex could potentially contain:

- A new City Museum
- A Digital Technology Experience
- The Jeanie Johnston famine ship experience
- An Ambassador Hub 'Ireland of the 1,000 welcomes'
- A new city library
- A temporary exhibition space
- An International Visitor Experience
- An interactive, dramatic based experience

CHQ Building, Museum of Irish Creativity

This proposal has been in development over the past two years, and is being led by Declan Fearon, managing director of Tipperary Crystal. The proposal involves installing a number of tourism and leisure facilities in the CHQ building on Dublin's Custom House Quay. This is a very large building, comprising 13,760 m² on the basement (vaults) and ground levels, plus potentially a further 2,300 m² of mezzanine space (currently not installed).

The proposal includes:

- Museum of Irish Creativity (c. 1,625 m²)
- a dance museum, studios and performance space
- genealogy centre (c. 850 m²)
- other facilities including retail, restaurants, banqueting area, and a Tipperary Crystal experience / exhibition.

It must be emphasised that none of these components or their size allocations are either certain or unchangeable. The concepts must therefore be considered to be illustrative only. The proposed Museum of Irish Creativity includes references to the Diaspora but is mainly concerned with the story of Irish literature and visual art over the ages from pre-history to the present.

The building has now been put up for sale by Dublin Docklands Development Authority with an asking price of €10 million. It is an historic cast iron and brick warehouse, built in 1820/21 and formerly known as Stack A. It was refurbished and converted for use as a shopping mall by DDDA at a cost of approximately €45 million. However, to date, this use has proved unsuccessful, and only 11 of the 25 units are currently occupied.

Dún Laoghaire Harbour Company – New Build at Carlisle Pier

The National Diaspora Centre in Dún Laoghaire is part of a masterplan for the Harbour which was adopted in October 2011 and is due to be completed over a period of 15 to 20 years. The aim is to realise the harbour's potential as a major marine, leisure, cultural and tourism destination, as well as securing its long-term viability. The Harbour Company has set up an associate company, the Irish International Diaspora Centre Trust Ltd. to develop the project.

Location

A new building will be constructed on Carlisle Pier, which was originally built between 1855 and 1859 and used by the mailboat between Dún Laoghaire and Holyhead for over 100 years. Many Irish people emigrated from the Pier.

Concept: Irish International Diaspora Centre

The project envisages the construction of a large building of up to 15,000 m² incorporating the Diaspora Centre, a 350-seat auditorium and an unidentified second attraction to complement the Diaspora Centre. Inclusive of a shop, restaurant and genealogy centre, the Diaspora Centre extends over about 6,000m² of which about 4,600m² is occupied by exhibitions. The proposed exhibition includes:

- 8 themed Emigrant Journey spaces
- Hall of Fame
- Temporary exhibitions
- DNA and Genealogy space

Dún Laoghaire will co-host the third annual Global Diaspora Forum. Other Forum events will take place in Washington, Los Angeles and Silicon Valley in May 2013.

Limerick City Council – Riverside Site

Background

Limerick City Council has created a Diaspora Working Group consisting of representatives from the Council, Fine Gael, the University of Limerick, Shannon Development as well as the Limerick City Business Association.

Location

The Diaspora Centre would be part of a cultural campus that would include a new city archive and library, a new city museum, performance space and tourism information centre. There are a number of sites that they have in mind depending on the scale and scope of the attraction – at this stage they have not developed a detailed concept.

Their ideal location is the Riverside site given its prominent position on the River Shannon. It is currently owned by Dunnes Stores but has been empty for a number of years. The plan is to acquire the site, demolish the existing building and build a modest (but iconic) riverside building. Other locations – the Opera Site, Granary Building, Potato Market, Limerick Courthouse – will undergo development in the coming years and might also prove to be good locations.

The Diaspora Centre Concept

The exhibition is intended to be dynamic rather than static. There are many angles they are considering that are relevant to Limerick (shipping, links with the American Army, more recent diaspora, young entrepreneurs, links with school of art and fashion world, music - Mícheál Ó Súilleabháin Irish Music connection, etc.) and they are working towards a broad concept that utilises the most up-to-date technologies.

The Irish Ancestral Research Centre (IARC) currently based in the University of Limerick would become part of the cultural campus bringing with them genealogical expertise. They have identified potential collections that could be displayed as part of the diaspora exhibition.

Longford County Enterprise Board – Granard site

Background

A proposal to set up a National Diaspora Centre in Granard is linked to a community plan to purchase a building there from the National Asset Management Agency. An alternative site, also being discussed, is the Connolly Barracks in Longford Town.

Concept

The concept proposed by Longford is 'triumph over adversity'. The proposed content would explore the stories of Irish people who were forced from their homes and arrived desperate and penniless on foreign shores. However, the story would also highlight the success of these emigrants in their adopted countries.

The themes proposed by Longford County Enterprise Board are as follows:

- Who: Who emigrated? What can census and other records tell us about them?
- When: When did emigration take place? Using maritime records and linking with databases housed abroad to paint a picture of emigration in the past.
- Why: Why were people forced to emigrate?
- How: How did people survive? What are the stories from the other side?

Shannon Development

Shannon Development has been involved in promoting two locations in the Shannon Region. The first, 'The World of Irish' is proposed to be co-located with the Bunratty Castle and Folk Park. The second is Birr Workhouse.

Bunratty Folk Park

Background

Shannon Development first developed the concept of a Diaspora Centre in 2001. The Centre for International Co-operation prepared a report in 2001, which assessed the market potential for providing a world-class visitor attraction in the Shannon region. The attraction will depict the history of Ireland and the global impact made by the many people who emigrated from this land. This report was followed up in April 2007 with a 'Scoping Study for a Diaspora Centre.'

Concept

The overriding theme of the World of Ireland is Ireland, its people and their contributions abroad. The two main themes (a) The Story of the Irish at Home, and (b) The Story of the Irish Abroad. The subthemes will chronicle Irish success in many spheres of life, namely, political, economic, social and cultural.

Visitors to the world of Irish will be brought on a worldwide journey of Irish success and achievement, the story being told also along the way of the many hardships emigrants had to endure. The concept of leaving Ireland on a journey to the New World will be reflected in the design of the facility. The Irish Centre will act as the focal point of the facility representing the logical start and finish of the journey. In addition, each continent will be represented by its own sub-centre. All sub-centres will be interlinked with one another.

Birr Workhouse

Background

The workhouse at Birr, Co. Offaly, is believed to be the best preserved and least altered of all those left standing in Ireland. It is very close to being in the exact condition, both internally and externally, in which it and other Irish pre-Famine Wilkinson workhouses were built and given its architecture and historical importance, the workhouse is now listed as a protected structure.

Concept

The project proposers aim to build a website and search engine that focuses on Irish genealogy records at present online. The aim is to create a single gateway to the country's genealogical records. The Workhouse in Birr would become the base for online operations.

A Diaspora Centre would contain multimedia, pictorial material, 3D models, hands-on activities, interactive, reproductions, facilities for education, facilities for adults and children, a library and facilities for research. Different levels of interest and sophistication would be catered for: genealogy, social history, folklore, music, drama, literature, nostalgia, etc.

An Irish Diaspora Attraction

Further work needs to be done on the mission, goals, form, content and functionality of a National Diaspora Centre (NDC), in the context of likely location, building, funding, visitor numbers and flow, before a final concept emerges, but certain principles need to be considered in the course of development. These include examination of the diversity of visitor segments, from overseas visitors, (with & without an Irish affinity), family groups, education parties, genealogy experts, etc. The solution must be far more than a synthesis of ideas from other centres; it must be a leading-edge institution of the 21st century, tapping into many sources of expertise in Ireland and around the world.

We need to establish:-

- A unique and overarching Vision which belongs to the Irish Diaspora and the People of Ireland and reflects a forward looking culture.
- The National Diaspora Centre must become one of Ireland's top attractions, high on the list of 'must sees' for overseas tourists and a major leisure destination for Irish people.
- A competitive brand, including an attractive name and strong visual identity, which will provide differentiation and reinforce the value of what the NDC delivers to its visitors.
- A clear and robust storyline with optimum potential for engaging interpretation.
- Interpretative concepts fully integrated in the built space.
- A memorable introductory display which sets the mood for the visit, captures visitors' imaginations, builds anticipation and offers a framework for making sense of the displays.
- A rich variety of media and display techniques to encourage every visitor's participation at a level and direction they feel comfortable with.

Throughout the consultations it was apparent that, in general, stakeholders envisaged that the NDC should have a physical entity. While a virtual presence NDC has been considered, it is clear that virtual exhibitions are not a substitute for the concrete expression of a story, supported by authentic material and historical insights, in a physical location. The scale and diversity of the Irish Diaspora requires a broad introduction as well as the provision of detail, which is the power of the virtual. We anticipate a geographic/thematic/chronological matrix structure underpinning interpretative exhibits and displays. Visitors need to find themselves – or their part of the world – so that their direct knowledge and experience connects with the extraordinary richness of the Irish Diaspora story. Technology/internet access facilitates investigation, study and communication on and off site. Through digital media, the NDC enables people, worldwide, to participate in its programmes and contribute to its work, building greater awareness of Ireland and increasing its attractiveness for visitation.

Consultations, market research and desk research have all suggested that the focus of the National Diaspora Centre should be a more modern interpretation of emigration and the 'scattering' of the Irish worldwide. The contemporary experience of emigration is not to leave forever. Even when the physical separation is for an extended period of time, or indeed a lifetime, technology has connected the world in new ways. There is a coming and going of ideas and people in a globalised world. Ireland, as the third most globalised economy in the world in 2013, knows this better than most. The concept of 'brain drain' has been surpassed by 'brain gain'. Cultures have gained from the mix rather than lost. Ireland's culture, a leading aspect of its brand, is no different. We have changed the world and it has changed us. The lines on the map may have stayed the same, but the geography of identity has altered dramatically. This is the core of the story being explored in the NDC.

Academic links

The present and historic Diaspora is a topic of great importance to Ireland and to the Diaspora. The content of the exhibition presentations requires disciplined curatorial development and monitoring. This is likely to be achieved best through the appointment of an academic group or through formal linkage with an appropriate academic institution.

The form of any connection would need to be scoped out but there is no doubt that a partnership with a leading university has potential for both the NDC and the partner University. For example, NUI Maynooth offers a course in The Irish Diaspora as part of the Department of Geography's range of undergraduate modules, while University College Cork has an MA in Contemporary Migration and Diaspora Studies.

A Conceptual Framework for a National Diaspora Centre

The Concept

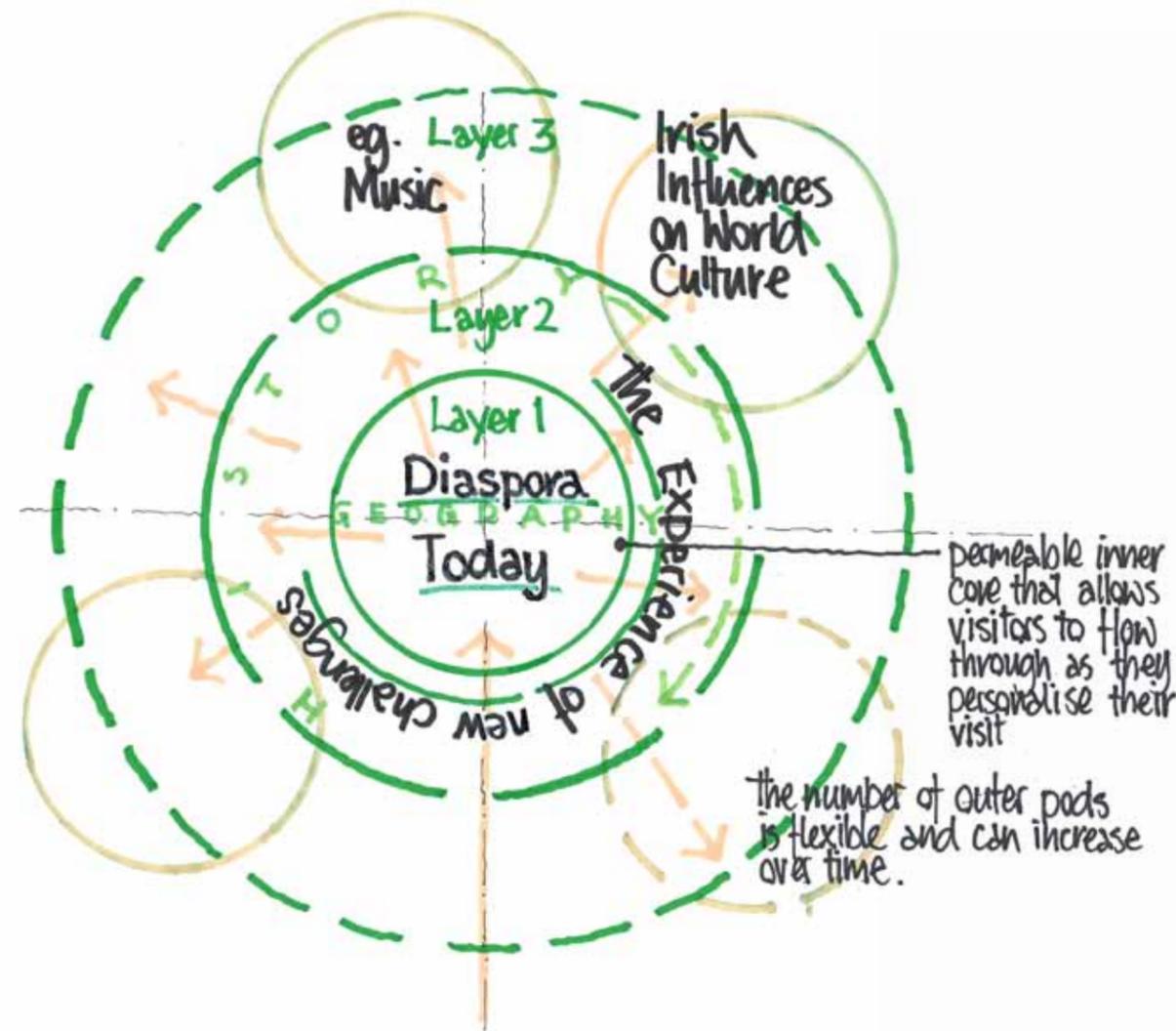
The 'why' for the NDC is clear and has been expressed elsewhere in this document. The Market Analysis clearly identifies 'for whom'. 'Where' has yet to be decided and the scale of the enterprise requires clarification and debate. The following pages endeavour to establish a vision of 'what' and 'how'.

The overarching concept for the NDC is that the Irish Diaspora is a reflection of Ireland: in exploring stories of the Diaspora, visitors gain a better sense of what it means to be Irish - yesterday, today and tomorrow. The Irish Diaspora exhibition is conceived as a continually developing dynamic experience, a living laboratory of Irish spirit, culture, character and achievement. We envisage three core elements supported as required by back of house, education facilities, retail, catering etc. These are:

- The Diaspora Today
- Encountering Challenge – Yesterday & Today
- How Ireland Changed World Culture and Society

These elements are related and interdependent. In aggregate, they stimulate discovery, understanding and appreciation of the scale and impact of the Irish Diaspora.

The three elements of the structure can be thought of as the skins of an onion where each layer coalesces with the next and the sum becomes the entire.



The diaspora community permeates the layers of the story:
...inhabiting the past
...engage with the present
...and make an adventure of the future

Three Skins

Visitors enter directly into the first 'skin' at the heart of the experience, which presents the world. Here visitors can select any part of the world and discover Ireland's real time presence in a particular continent, country or city. It is an immersive hub connecting the Centre to Ireland's current Diaspora.

A second 'skin' is shown surrounding the first. It might run parallel or equally be on another floor. Visitors are able to explore how Irish immigrants assimilated, how they affected the countries they established themselves in and how they impacted the cultures they joined. Cross access between these two 'skins' encourages cross references and reinforces understanding of social development over time.

The third 'skin' consists of a series of pods: self-contained experiences, each dedicated to a genre or discipline in which Irish migrants have impacted world culture. Each pod will have its own look and feel, drawing inspiration from the subject at hand, but the pods will work together as a suite of experiences, amplifying the message of shared identity.

Perhaps the most obvious subject to explore within the third 'skin' is music. The influence of the Irish on music, particularly in America but also in Britain and mainland Europe, has been, and is extraordinary. Much of the contemporary international music scene possesses an Irish gene or two!

Further pods might explore the influence of Irish writers on the development and direction of 20th century and

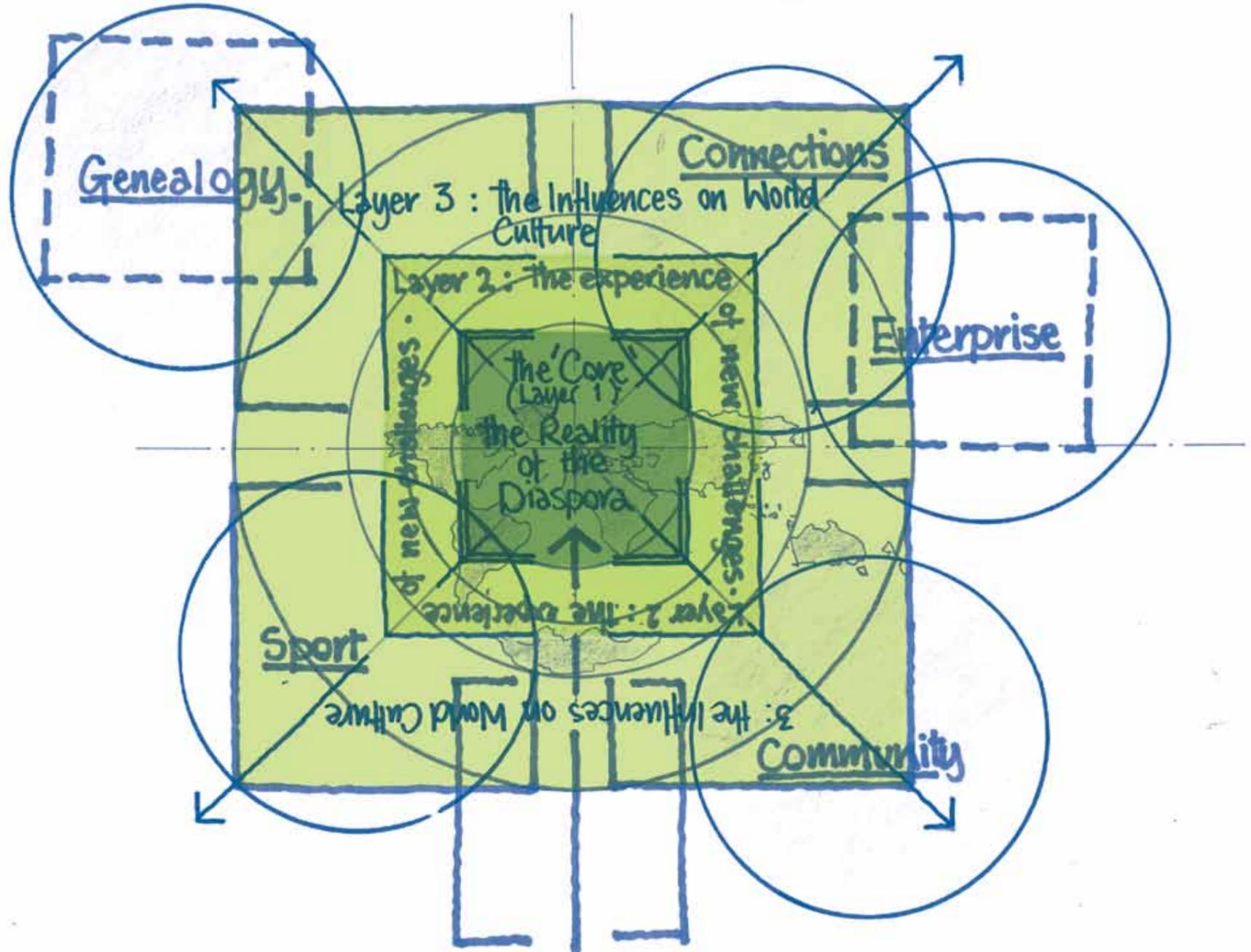
contemporary literature - or politics, or medicine, or enterprise, or charity work. The content of the pods could change on an ongoing basis, with the choice of subject matter at any given time reflecting Irish or world events.

What is proposed overall is a complex and rich presentation which establishes itself in the hearts and minds of both local and international audiences.

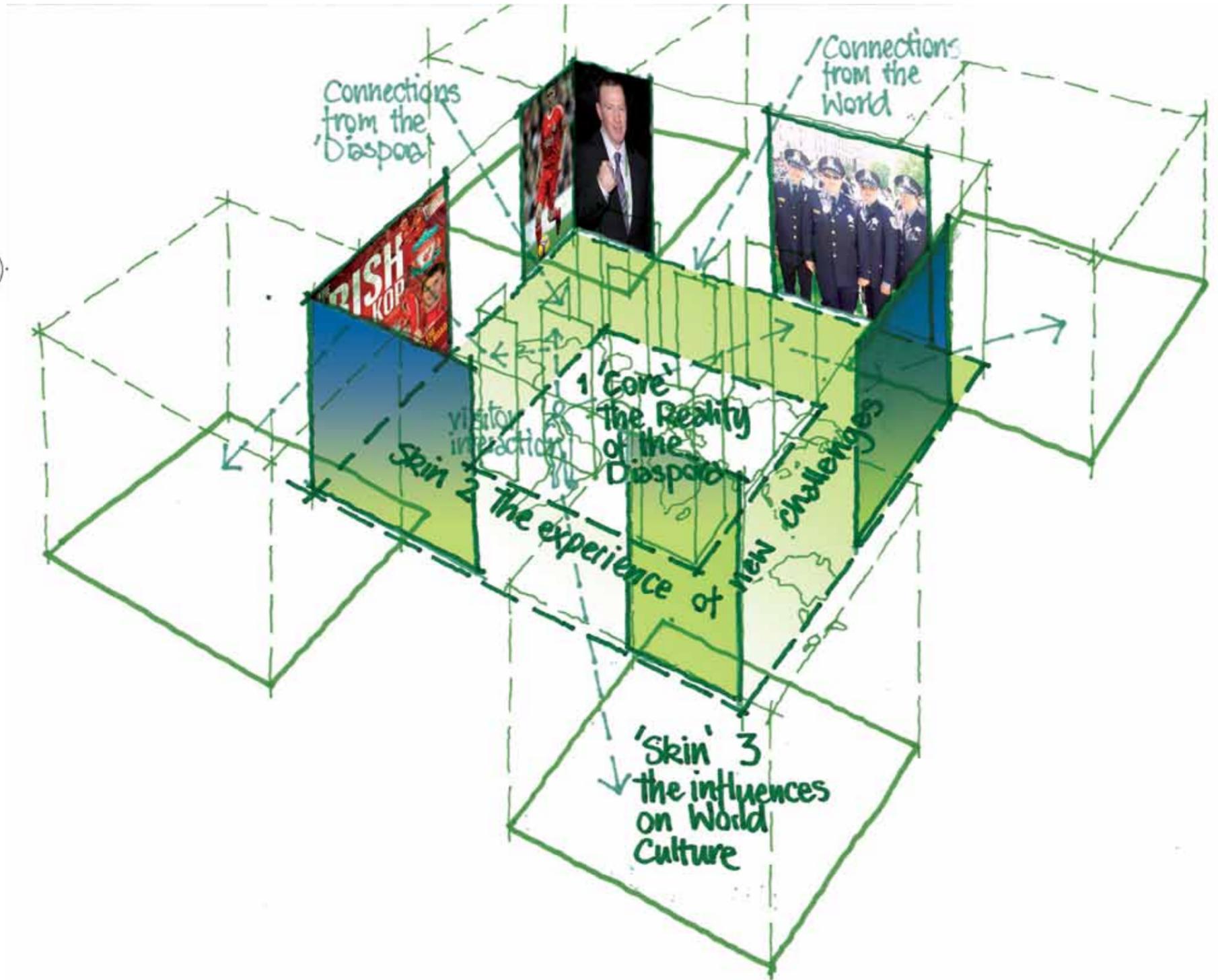
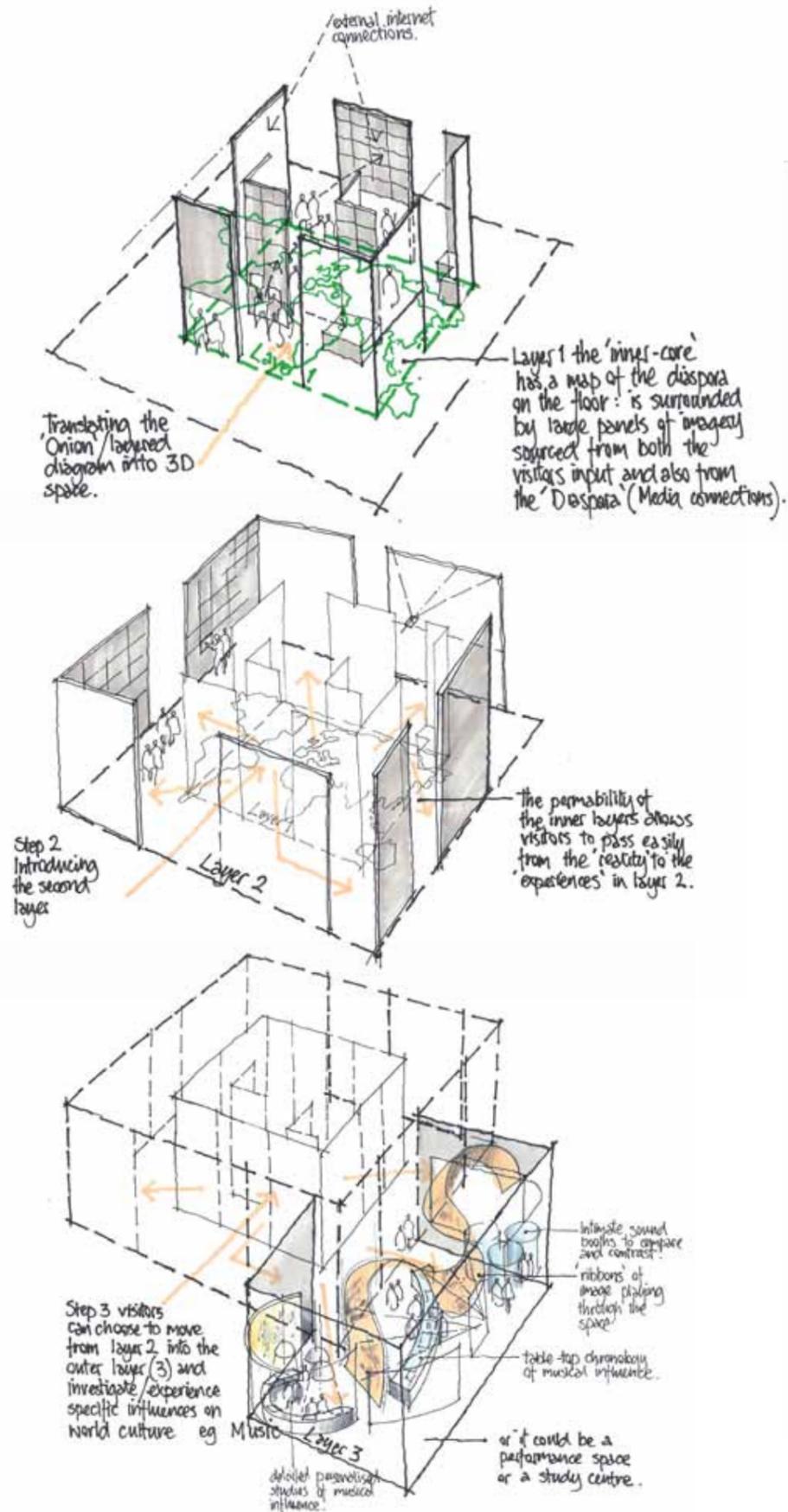
It will take time to establish the connections around the world which will ensure continuing freshness and relevance. Ideally, when fully established, the NDC will enable access to any diaspora organisation that wishes to contribute. At the start it will explore the current reality of the Irish Diaspora by filming individuals and communities across a number of countries, demonstrating the huge variety of experience and connections.

The motif we have taken for the NDC is *connectivity* – between Ireland's Diaspora and the Irish at home, between visitors to Ireland and one of the central cultural experiences of the Irish people, between immigrants to Ireland as well as migrant communities across the world - and the challenges faced by the Irish as immigrants - between the past and the present.

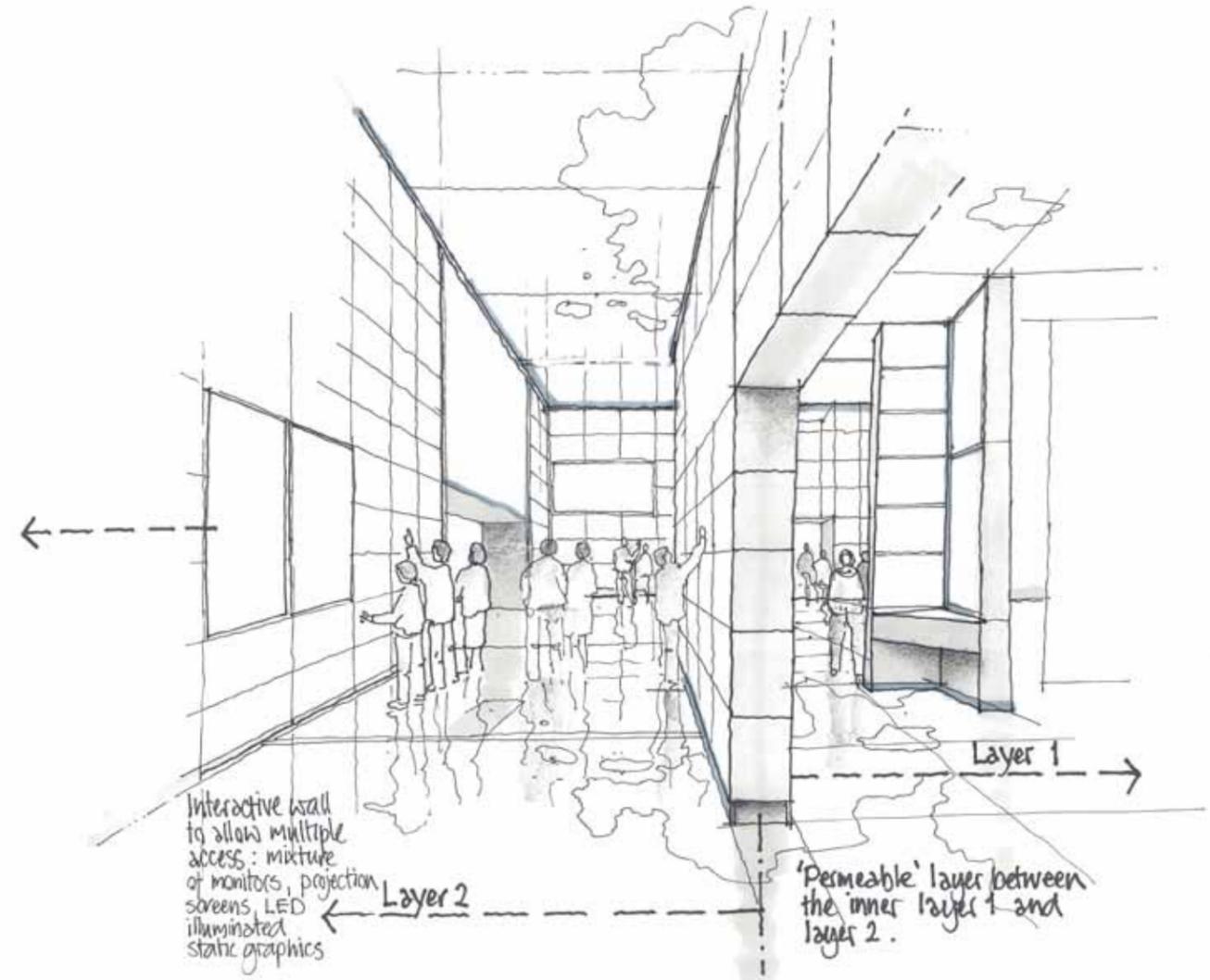
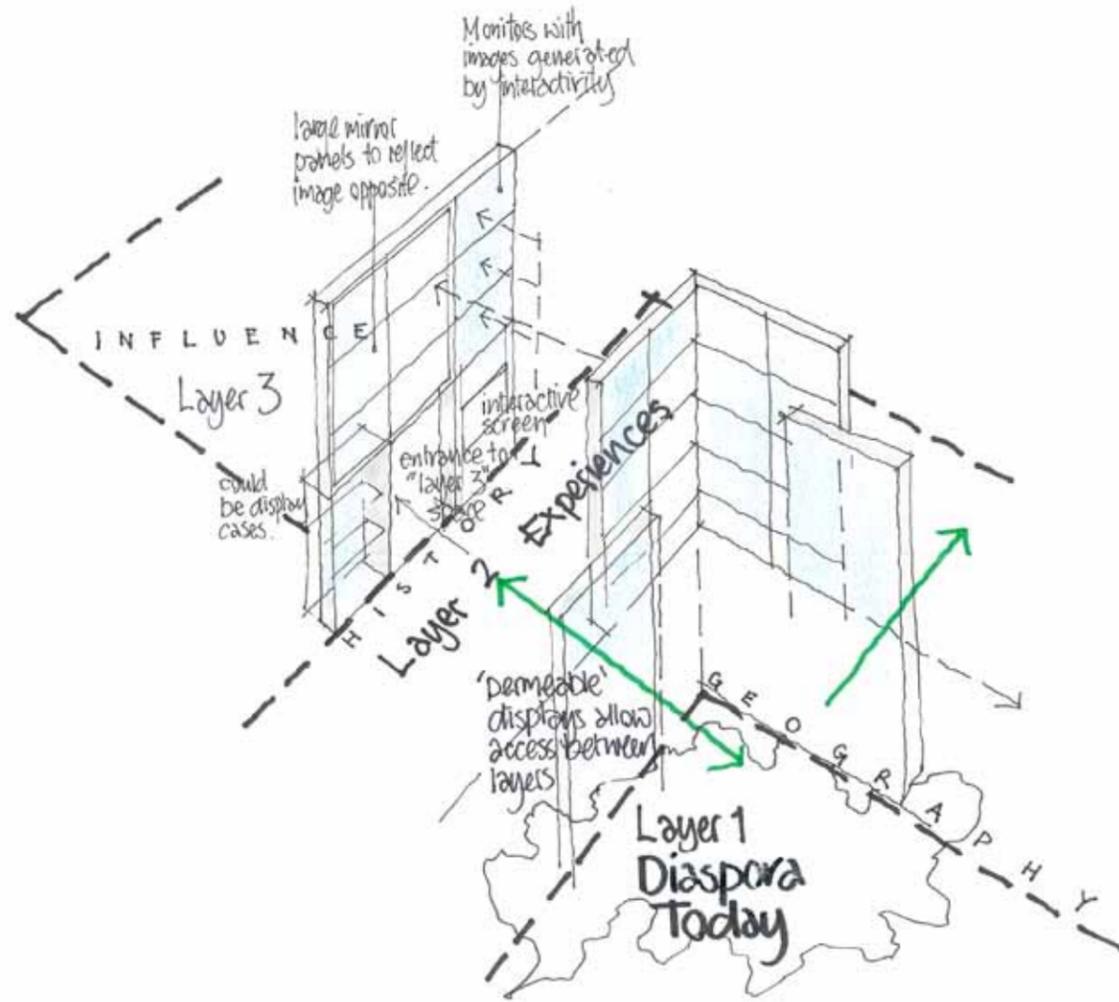
While there is much to debate and resolve prior to content selection, this project represents an opportunity to develop a major tourist attraction which will foster a sense of self awareness, ownership and engagement among all these diverse communities.



Three Skins



Three Skins - Permeable



Skin 1

Just Imagine – How the National Diaspora Centre might be

The starting point we propose is the *Diaspora Today*. Why? Because 'today' is immediate, meaningful and involving. Because Ireland's young people are once again colonising – making a contribution in health, education, media, banking... as entrepreneurs and charity workers. As ever, the reasons for leaving are harsh – no job or no suitable job and a family to support, a career to develop and a life to make. But gone are the days, as described by Detta O'Cathain, who remembers her grandmother in the late 1950s bursting into tears and saying: 'No one ever comes back from New York'.

To be truly successful, the National Diaspora Centre needs to resonate with the Diaspora as it exists now. As well as hosting stories of the Diaspora, past and present, the Centre needs to consider how it can play a role in the lives of the Irish Diaspora. The Centre might do this in a number of ways: by offering resources to members of the Diaspora, by hosting a link with home, by inviting emigrants to use the Centre as a platform to share their stories and experiences.

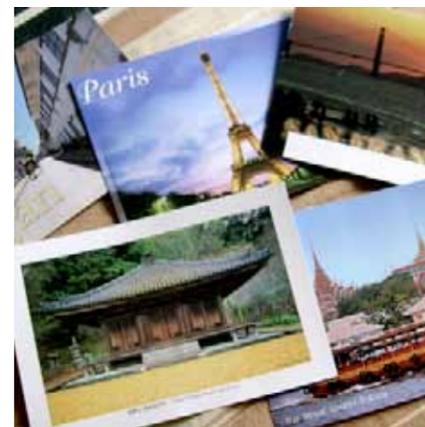
The core display of this 'skin' is an immersive, live feed, real time presentation of Ireland's Diaspora today. Content is determined by physical and virtual interaction to create a 'viral exhibition' that takes on a life of its own in the same way that a story on Facebook or Twitter takes on a life of its own through the interactions of individuals. It shows the Diaspora's current and ever changing presence in the world, as well as identifying where in the world Ireland is being talked about at any moment in time.

Our emigrants go wherever opportunity exists and, often, where others have gone before them - by and large with a good education, a 'can do' attitude and well-honed interpersonal skills. These young people have been described by author/philosopher Charles Handy as 'Ireland's gift to the world'. Technology and social media form integral parts of their lives. They stay in touch with one another and with home. Many of them subscribe to professional social networks. One way of bringing their voices into the NDC would be to create a specific presence on one or more social media platforms, such as LinkedIn or Facebook, where the stories of Irish people working and living abroad can be brought together and, from there, linked to the NDC's physical and virtual site.

We propose a major online project which gets Irish people all over the world to contribute. We kick-start the project with – say – a thousand stories. In this way people are encouraged to contribute another story... another... another. Included in the live/current mix would be links – some physical - that the public could visit in Melbourne, Milan, Montreal or Manchester - to name just four. The Diaspora Centre would host its own presence on social media sites and build its own up to date social network. *The City of a Thousand Welcomes* project in Dublin has successfully matched visitors to the city with Dubliners, in an effort to maximise the warmth and welcome the city is famous for. The Centre might adapt this idea by matching visitors with members of the Diaspora overseas, allowing them to connect and share experiences.

Another source of content might be provided by digital storytelling pods set up in Ireland's main airports. Departing or arriving emigrants could record their stories or emotions on leaving (or returning to) Ireland and these could be uploaded to provide an ever-changing picture of emigration. Analytics might be used to create a digital representation of the 'mood' of the diaspora using the most frequently referenced words e.g. 'optimistic', 'pessimistic', 'scared', 'excited', 'hopeful', 'homesick' etc. Large scale displays are awash with interactive/social media opportunities.

There are numerous online resources for the Irish Diaspora – for example, during the last general election, many websites hosted mock elections that emigrants could vote in. The Centre, virtually and on-site, could become a hub for these resources and a way for emigrants to keep in touch with each other and with home. The World Irish site (www.worldirish.com) already offers this kind of platform for the Irish worldwide. Among its innovations is the @Ireland account on Twitter, curated by a different person every week – always with an Irish connection but not necessarily in Ireland. Twitter is an invaluable resource for constantly refreshed content. Content from Ireland-relevant accounts and hashtags could form a changing element of the content within this 'skin'.



...sparking and facilitating user-generated content
...sharing and creating dialogue
...contributing and accessing experiences



Skin 1

The Irish Diaspora Today

The central hub of this skin is an immersive, live feed, real time presentation of Ireland's Diaspora today. Content is determined by physical and virtual interaction to create a 'viral exhibition' that takes on a life of its own. It shows the Diaspora's current and ever changing presence in the world with its people telling their own stories, as well as identifying where in the world Ireland is being talked about at any moment in time.





The Irish Diaspora Today
Visual showing interaction



Skin 2

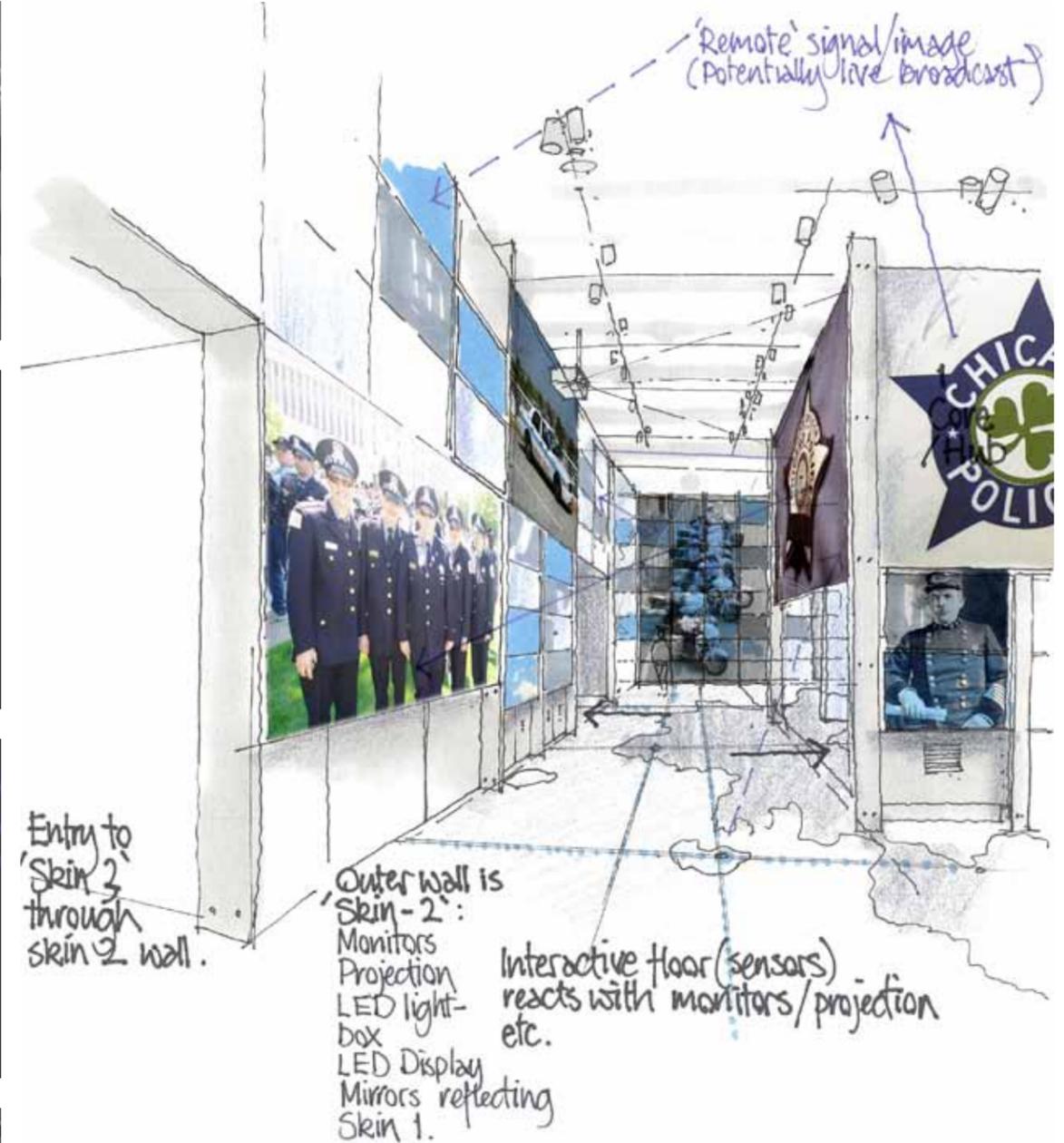
Encountering Challenge – Yesterday and Today

Exploring the challenges faced and wonders experienced by those who emigrate, *Encountering Challenge – Yesterday & Today* includes historical and modern day contexts and takes the form of an exploration of the challenges, new and old, faced by those leaving their homeland. It includes the history of Irish migration from the first millennium through to the present day. The driving forces of Religion, Economics, Sociology and Politics are reflected in outcomes in host countries. The Irish presence, formal and informal, as well as Ireland's institutional links to each country are recognised. A global story which finds a place here is the huge contemporary growth in people living outside their country of origin / birth across the world and the challenges they too encounter. The issues faced by Irish migrants overseas might be interspersed with the experience of emigrants to Ireland – the voices of Polish or Nigerian residents reminding visitors that migration is increasingly part of life in the 21st century.

A valuable contribution the National Diaspora Centre can make is to query, honestly and incisively, why emigration has been a near-constant feature of Irish life over the centuries. Is it inevitable that the inhabitants of a small island would travel beyond its shores to seek out new lives and new experiences? What are the comparisons and contrasts that might be drawn with other countries – for example, with New Zealand, where 'the Big OE' ('overseas experience') has become a part of the national identity, regarded as a milestone in a person's formation.

One of the biggest changes in the lives of the Diaspora is the resource provided by technology to keep in touch with home. A display might powerfully contrast the letters written home by previous generations with the skype, facetime and whatsapp conversations of today. Although the media may have changed, the content deals with many of the same issues (*how are you settling in? are you making friends? finding work? interleaved with how are things at home? how's Mary/John/Colm?*) Do emigrants feel less far from home, knowing that they can see their friends and family on a computer screen? Or does the tyranny of distance still create a feeling of isolation?

Content cannot gloss over the hardships faced by Irish emigrants, not least the racism and negative stereotyping members of the diaspora have had to face. Although no member of the current generation of emigrants will have faced the infamous 'no dogs, no Irish' signs of the past, casual racism still abounds. The Centre can offer a platform to discuss Irish stereotypes, both negative and positive, and to interrogate Irish identity in the 21st century.



Creating connections across:
...time
...space
...consciousness

Skin 3

How Ireland Changed World Culture and Society

An outer circle expresses the overarching theme of how the Irish have left their mark on the world. *Ireland's Contribution to World Culture and Society* examines an eclectic diversity of experience and achievement. Displays within the third 'skin' explore the science, the artistry and the emotion behind Irish contributions to the world. From DNA, through genealogy, to achievement – what makes success stories like U2, JFK, *Once*, Jim Stynes - fundamentally Irish stories?

Ireland's strong sense of connectedness with the Diaspora is never more obvious that when an Irish person (or person of Irish descent) makes a name for him or herself on the international stage. This seems to be connected to the notion of the Irish punching above their weight – but is there more to it than that? The Irish are known for their success in the fields of music and literature, but Irish accomplishment cuts across every walk of life. Are there particularly 'Irish' traits or skills that yield this kind of success? Visitors might nominate the traits that they see as being characteristically Irish, while experts (geneticists, genealogists, historians, cultural commentators) debate their opinions.

Next, a presentation of the science of genetic identity – *where did the Irish come from? who are our ancestors? What is our genetic make-up?* An exploration of the evolution of the Irish people and culture a la Robert Winston. This space could also offer a fun DNA testing experience for visitors and even generate the possibility of building a huge genetic database for research on Irish identity.

Genealogy is a key content element for exploration within the NDC. The success of programmes like *Who Do You Think You Are?* attests to the public's interest in the subject, but also give clues to making it fun and engaging. One light-hearted way of pulling visitors into the topic is to present a version of 'six degrees of separation': pick a famous Irish person

and see how you're connected ... visitors will be delighted to know that they're sixth cousins seven times removed of Barack Obama, or that they went to school with the great-great-niece of Michael Collins. Family tree-building software enables visitors to create (or start) a family tree on the spot, drawing on genealogical resources such as the online censuses and registers of births, marriages and deaths. *Show and tell* sessions with genealogists might be arranged on a regular basis to help interested visitors get started.

The emotional impact of music, stage and screen can be used to great effect within this 'skin'. Live sessions and performances can take place in the multi-purpose space, while at other times visitors select from a virtual 'greatest hits' of Irish talent. Visitors' hair stands up on the back of their necks when they encounter the tunes that speak to their Irish roots, whether this be U2's 'Pride in the Name of Love', Christy Moore's 'The City of Chicago', Bing Crosby's 'Irish Eyes are Smiling' or a performance of Riverdance. You cannot escape the influence that Irish music and musicians have had and continue to have. The 'Bringing All Back Home' documentary represents an invaluable resource in exploring its roots and influence.

The influence that Irish music had on world music is essentially an American/Irish and British/Irish phenomenon. Australasia, Canada and parts of Europe however also have stories to tell. Irish music itself changed with the journeys that the emigrants made but by far the most fascinating story tells of the meetings that took place between Irish musicians and those of the New World and its African associates!

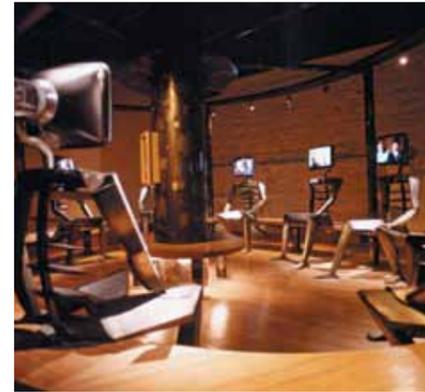
Dance music left Ireland in the heads, hands and feet of the emigrants. In America its seductive rhythms influenced a host of diverse traditions, from Bluegrass to Country and Rock. When Irish music met the Blues a whole new genre was born and Irish influences can be heard in most of the musical genres of the mid to late twentieth century. In the 1950's, when the Clancy Brothers were perfecting their style in the clubs of Greenwich Village, the young Bob Dylan was in the audience. Would Bob Dylan sound the same if he had never heard Irish Music? Numerous such encounters have added up to make modern music what it has become today. What started as a mere flirtation soon turned into a full-blooded marriage of styles – Modern Music.

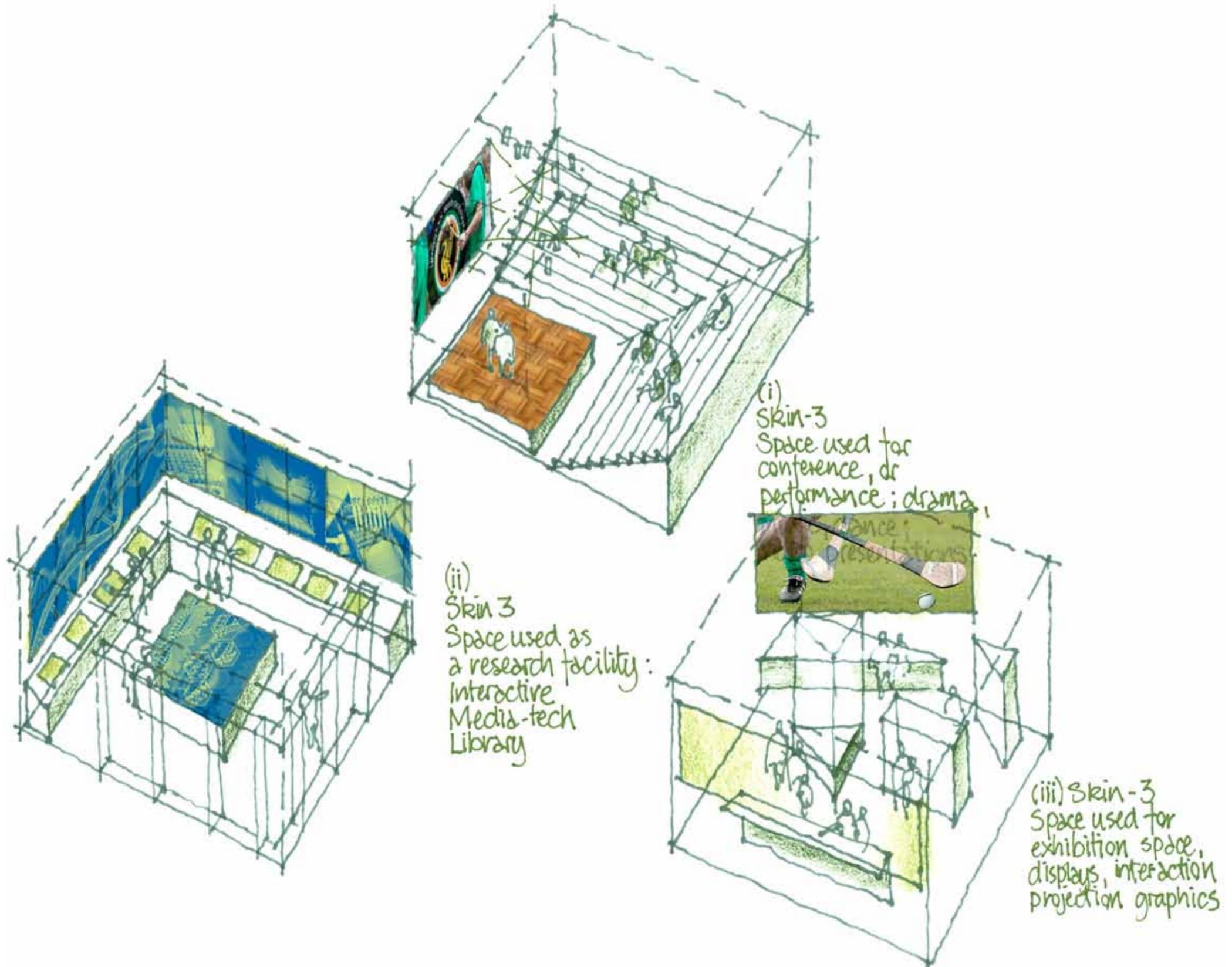
In the Diaspora project the complex story of the part that the musicians of Ireland played in this monumental music phenomenon can finally be celebrated in a dynamic series of interactive encounters and digital performances.

For the sake of this study we have grouped the myriad possible subjects that offer themselves for exploration within this third 'skin' under the following headings:

- Genealogy** – Roots, Families, Records, DNA
- Culture** – Language, Literature, Drama, Music, Art & Design
- Enterprise** – Industry & Commerce, Banking & Finance, Science
- Community** – Politics, Military, Education, Health, Missions, Public Service, Trade Unions
- Sport** – in all its aspects.

A celebration of "Irishness" ...its legacy ...its influence





Location

The rationale for the selection of a location for the proposed NDC depends on the role and objectives of the promoters. Most of the current NDC proposals have been developed within a wider context of urban regeneration and overall destination development. This reflects the goals of the respective promoters. The criteria that we propose below are related solely to maximising the chances of success for the NDC as a sustainable operation, attracting large numbers of overseas tourists and Irish residents.

At present, a Dublin city-centre location is the most likely option to meet these requirements.

- **Locate in or near large population centres:** most tourist attractions with high visitation levels are to be located in or near large urban centres. The principal exceptions are major natural heritage sites such as the Giant's Causeway and the Cliffs of Moher.
- **Locate close to tourist concentrations:** it is essential that the NDC be located, where or very close to where, there is significant tourist footfall. A major influence on decision-making by tourists is the limited time that they have available on a holiday or city-break. Research into tourist behaviour in Dublin has found that by far the most common reason for not visiting an attraction of which they are aware is insufficient time. A Fáilte Ireland survey in 2010 also found that there is a very wide gulf between the number of attractions that tourists plan to visit in Dublin, and the number they actually visit.
- **Locate close to transport connections:** one of the obstacles to generating large visitor numbers is the relative difficulty of access, which is a function of distance, availability of transport and any challenges arising from topography (e.g. steep hills etc.). The NDC should be located adjacent to major roads and public transport services.
- **Locate close to the sea:** as an island nation, the subject of our diaspora and emigration has a strong emotional connection with the sea, and the vast majority of emigrants over the centuries left by boat. Air transport only became a good alternative in the 1960s, and has since become the primary mode of emigrant transportation.
- **Proximity to supporting attractions and other facilities:** visitor attractions are more likely to prosper when located in an area where there is a selection of supporting tourist services – cafés, bars, shops etc. – and other, complementary attractions.

One of the most significant questions facing the developers of any new visitor attraction or museum is 'how big should it be?' The answer to this question is not straightforward and lies in the consideration and analysis of a host of issues from availability of funding to forecast levels of visitor throughput. Any analysis of scale is further complicated in circumstances where the attraction being developed is supply rather than demand-led as is the case with the NDC.

Certainly, there is no simple answer and Europe is littered with projects that have either been too ambitious in terms of their scale and have suffered on-going financial difficulty - or even failure - from the outset (such as the Centre for Popular Music in Sheffield, The Lowry Centre in Salford or the Baltic Centre for Contemporary Art in Gateshead) or have been too modest in their initial assessment of success and have sought almost immediate extension (such as the Eden Project in Devon). Analysis in support of museum or attraction development is a critical first step but it must always be remembered that it is an art rather than a science and that there is never an exact or finite response to the question 'how big should it be?'.

Notwithstanding the above, part of a visitor attraction's success lies in its scale. With appropriate scale comes the ability to create an impact through market presence and to attract visitors. If an attraction is small there is a sense that there is not much to see, but too big and there is a risk it becomes hard to maintain interest throughout the whole experience. Equally, too small and the ability to generate revenues can be inhibited, too big and the operational costs fall out of kilter with the ability to generate income and financial sustainability becomes a challenge.

As referenced above the rationale for scale must be based on a close understanding of a series of factors – including expected visitor numbers, availability of funding and the extent and range of the non-core programming. What follows is an overview of these key issues. Since there are many unknowns with respect to the NDC at this point, the discussion is necessarily focused on general principles.

While a virtual presence NDC has been considered, it is clear that virtual exhibitions are not a substitute for the concrete expression of a story, supported by authentic material and historical insights, in a physical location. The scale and diversity of the Irish Diaspora requires a broad introduction as well as the provision of detail, which is the power of the virtual. Optimal impact will be achieved by combining the virtues of a web platform and a physical site.

Scale of Ambition

At the outset it is important to assess the scale of a project's ambition. Is the project to be of local, regional, national or international scale? If local, the initiative is likely to be of a lesser size than a project designed for an international audience. For example, the Titanic project in Belfast was, from the outset, designed to be of international scale and impact and was conceived as such with a budget, design and location to match. This contrasts with the new visitor centre at the Giant's Causeway which, while still an important project of significant architectural merit, has a more national focus.

Given the subject matter being considered by the NDC, it is essential that it has presence and scale so that it has real stand-out positioning for members of the diaspora and Irish residents. It can justifiably be regarded as an initiative of international import, and its scale needs to reflect this.

Availability of Capital Funding

Notwithstanding the standing and positioning of the project, the availability of capital funding is a major determining factor when thinking about the scale of a project. New attractions are capital intense undertakings that demand funding for land, buildings (either refurbishment or new build), exhibition development, fit-out and launch. It stands to reason therefore that a major determinant of a project's scale is the availability of funding.

In the case of the NDC it is unclear at present the extent of capital funding available in support of the project either from Fáilte Ireland alone or from a more pluralistic collection of sources. This factor needs consideration both in absolute terms and in the context of the wider economic benefits that will flow from the development: *what is the economic case in support of the development?* The present economic climate is unfavourable for raising project finance, and different options for project delivery are outlined in the Financial Analysis.

Availability of Operational Funding

While the availability of capital funding is, more often than not, regarded as a higher order consideration than operational funding, the availability of ongoing funding is nevertheless a vitally important consideration. It is worth noting that over the 50 year life of any project it is likely that the capital cost will represent less than 10% of the total life time cost of the project. Given this is the case the issue of operation is of vital import and a central question at the outset must be: *how is the project to be operated and is it to be run as a subsidised or a self-sustaining undertaking?*

It is therefore important to determine whether or not the NDC is to be established as a self-sustaining undertaking with responsibility for its own income and expenditure account or as a subsidised facility reliant on public funding. If the former, it will be essential that it generates a sufficient surplus to provide for its own renewal. If the latter, what is the appetite for supporting the initiative, either in perpetuity or for a fixed term?

Is the Development within an Existing Building?

While a new build project (on either a brown or greenfield site) has the luxury of flexibility in terms of determining the shape, form and scale of its accommodation, an attraction that is to be located within an existing building has less flexibility. Not surprisingly, this is a factor that plays a major role in determining the overall scale of an attraction and very often a design solution is required to maximise the opportunity inherent within the physical constraints of a particular building (or set of buildings). An existing building will have to be adapted if it is to house collections or AV installations, both of which are sensitive to light and environment.

However, developing within an existing building means a large cost will already be covered. Timescales will reduce because of the shortened development process. The existing building may already be a presence on the tourist or local radar. Heritage buildings may also be eligible for grants to aid refurbishment.

At present it is unclear whether or not the NDC is to be accommodated within an existing or new build facility. Alternatives may exist for both scenarios and once these alternatives are to hand the preferred solution will need to be considered alongside a host of other factors.

Visitor Numbers

Perhaps the single most influential factor when considering the scale of any new development (and particularly its public facing component) is the expected level of visitor throughput. As mentioned above, if an attraction is too small there is a sense that there is not much to see, but too big and there is a risk it becomes hard to maintain interest. As ever, balance is important.

There are 'rules of thumb' that help guide design and development thinking and these build from expectations of visitor throughput and make assumptions about the peaks and troughs of visitor flow across an operational year.

A key factor is the 'Peak-in-Ground' figure. 'Peak-in-Ground' (P-in-G) is defined as the peak number of visitors within an attraction at the busiest time on the busiest day in any given operational year. It is driven by expected levels of annual visitation and makes assumptions about flow through the high and low seasons and across an operational day.

For example, for an attraction that expects 100,000 visits per year, the P-in-G figure is estimated at 480. Assuming an allowance of 2.0 m per person, this would suggest a requirement for an exhibition space of c. 960 sqm.

By contrast, a visitor attraction that expects to receive 300,000 visits per annum would generate a P-in-G figure of 1,440. At an allowance of 2.0 m per person this would generate a requirement for an exhibition area of 2,880 sqm.

It is important to note that this analysis generates an exhibition-only scale estimate. Depending on the events and activities programme of a facility (see below), the exhibition space might be between 40% and 60% of the attraction's total floor space.

So, a facility expecting 100,000 visits per annum might have a total sqm of between 1,600 sqm and 2,400 sqm. A facility expecting in the region of 300,000 visits per annum might reasonably expect to total between 4,800 sqm and 7,200 sqm. A facility of such a scale would enable a free flow of visitors at peak times, and also provide for the inclusion of capacious support and ancillary facilities.

Approach to Ticketing

The ability of a space (or set of spaces) to accommodate visitors is also influenced by the manner in which the space is managed. There are principally two approaches: free flow or controlled. The majority of attractions are free flow and allow a visitor to turn up, buy a ticket and wander through the galleries at their own pace. However, more popular, time- or space-limited attractions often seek to maximise visitor throughput with the use of timed tickets. This enables the operator to 'smooth' the peaks and troughs of visitor movement and increase throughput. Good examples of this include difficult spaces like warships and submarines, the newly opened Shard viewing gallery in London or the Titanic Belfast on its busiest days.

Strength of the Offer

A further consideration is the strength of the offer; its story and its collections and the appeal of the offer to the market. It is important to assess the proposed scale of any attraction development against prevailing market conditions. In this context a judgment needs to be made about the size of a development. While the story of the Titanic - with its international reach and levels of brand awareness and central city location - can justify a new building of c 12,000 sqm, other attractions cannot (cf. the Robert Burns Birthplace Museum in Alloway, Scotland or the John Murray Archive in Edinburgh both of which have gallery spaces of under 1,000 sqm).

Events and Activities Programme

The scale and intensity of an attraction's events and activities programme has a major impact on the overall scale of a development. Typically, a national museum development will seek to offer a broad and varied programme of events that require a range of non-gallery spaces in which to operate. These spaces might include classrooms, corporate spaces and an auditorium (perhaps more than one) and are required to be flexible and accommodate a host of activities from traditional school activities to the hosting of functions and events.

By contrast, some attractions may have limited interest in such extensive facilities and seek a more modest and utilitarian approach to such space through the provision of a single multi-functional area. An attraction with a significant events and activities programme is likely to find its gallery spaces comprising closer to 40% of total floor space rather than 60% (see above). It is anticipated that the NDC should operate a vibrant events and activities programme to fulfil its remit as a centre for engagement with the Diaspora.

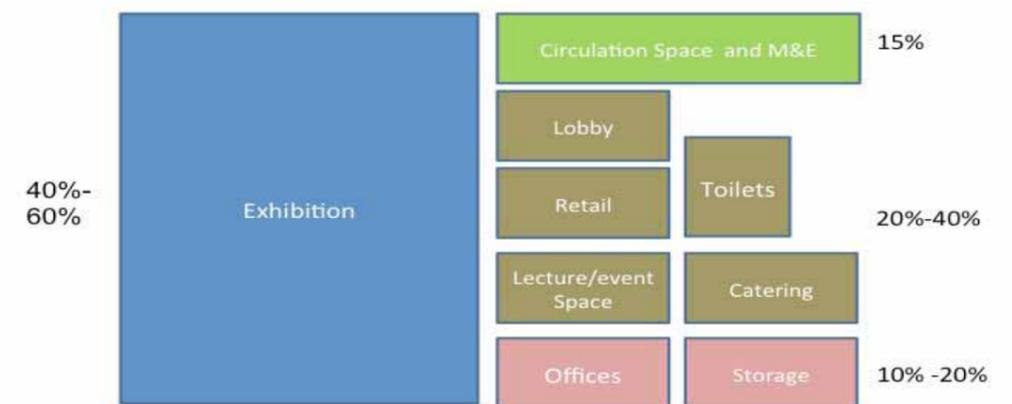
Ancillary Functions

There is an increasing expectation on the part of visitors that an attraction will have both a shop and a café / restaurant outlet. These components will vary in scale (depending on location and expected visitor throughput) and may either be operated in-house or by a specialist third party.

It is important to be able to assess accurately the demand for such facilities and shape provision accordingly. While commercial activities of this nature can make a valuable financial contribution they can also be loss making if poorly planned and operated. It is essential that appropriate retail and catering expertise are brought to bear on these functions.

Overall, the allocation of space within an attraction will vary according to the promoter's objectives, the form and content of the attraction and the emphasis on or need for ancillary services. An illustration of the average allocation of space is shown in Figure 3. As noted previously, the space allocation to exhibition typically ranges between 40% and 60% of the total - those at the lower end of this range tend to be in attractions that either occupy very large buildings, or that incorporate extensive ancillary functions.

Figure 3: Range of Uses in an Attraction (% of floor area)



Approach to Operations

A final factor that needs to be considered is how a new attraction is to be managed. This has an impact on scale by virtue of the requirement to accommodate staff. An attraction that is to be set up with a new and wholly independent operating team needs to be able to accommodate those staff (with offices, breakout space, back of house etc.). However, a facility that is either a satellite of an existing organisation or perhaps being operated by a specialist third party operator may have a reduced requirement for on-site staff accommodation by virtue of the fact that a series of shared support functions are accommodated elsewhere.

Once the operational approach to the NDC has been decided this factor should be taken into account in the detailed design process.

Given the above and based on the understanding of the NDC project from discussion and conversation over the past weeks it has been concluded by the project team that the NDC is a project that needs to be of a certain critical mass to succeed. Set out below is a rationale in support of this argument

Scale of the National Diaspora Centre

We envisage that the building required to create the National Diaspora Centre should be c 6,000 sqm. Of that, the exhibition would take up approximately 3,000sqm. Visitor experiences that tell a linear story tend to be more cost effective in terms of space. This is the appropriate scale to achieve the visitor projection of 300,000 visitors and would also provide sufficient space to tell a compelling story. Details of the visitor projection are set out in the Financial Analysis.

The proposed scale of the NDC is placed in context in Figure 4. This shows that major attractions and museums occupy large buildings. It also shows that it is possible for smaller scale attractions to achieve substantial visitor numbers. For example, the Science Gallery at Trinity College occupies a modest space of under 1,500 sqm, but it achieved a throughput of 243,000 visitors in 2011, based on innovative programming of temporary exhibitions (it does not have a permanent exhibition), an educational audience focus, visitor management and free admission. However, a small scale facility does not create presence or enable the creation of a significant visitor experience with both permanent and temporary exhibitions, nor the provision of extensive ancillary functions

The cost of delivering a brand new 6,000 sqm facility would be very substantial, and the availability of sufficient capital funding is undoubtedly an issue in the current economic climate. There are options to consider with regard to reducing the front-end cost. These include

- reducing the size and sophistication of the exhibition
- reducing the size and/or range of ancillary functions
- using an existing building that requires little work to convert it for use as an NDC.

If, having worked through these capital cost reduction options, there are still insufficient funds, it is recommended that the focus shift to an alternative solution. Rather than develop a weak centre of insufficient scale and quality to attract a large audience and be a facility worthy of the title NDC, the possibility of having a centre at an appropriate existing site should be considered. This would involve co-locating the NDC with an established institution, either as a separately operated tenant or as an integrated feature. Examples of such locations would be a university campus, where there is already a diaspora research programme, or a major national cultural institution such as the National Museum at Collins Barracks.

Size and Breakdown

An exhibition in the region of 3,000 sqm represents an ideal size to house the complexity of the NDC's objectives and to fully realise the importance of the subject matter. The space might reasonably be allocated as follows: The first and central exhibit dealing with the Diaspora Today needs to provide a comprehensive overview of each of the countries where the Irish have settled and where they make a difference. As explained, we envisage that the complexity of the space will grow as the countries involved become a living part of the presentation. 750 sqm has been allowed for this first skin.

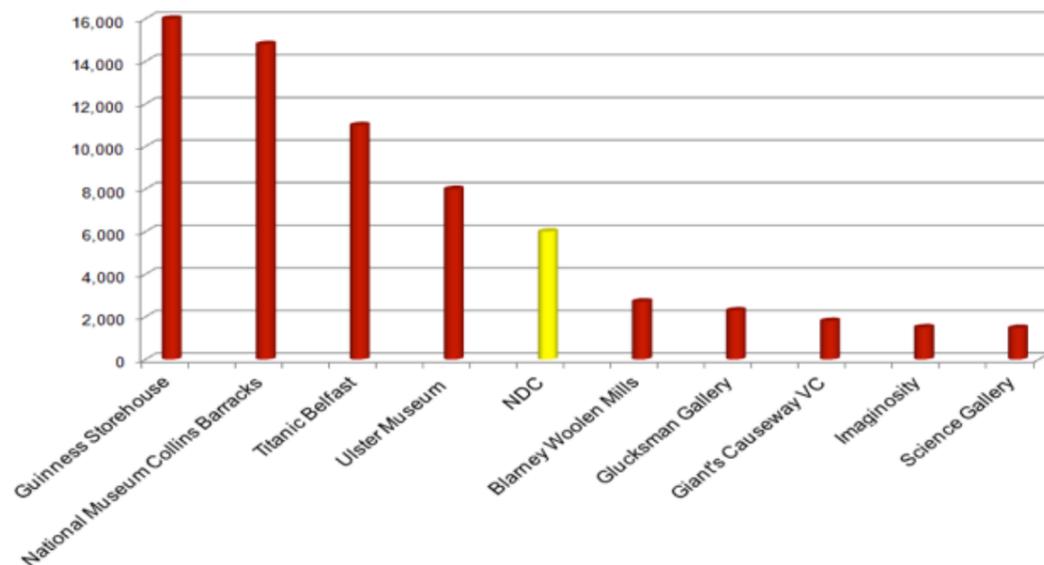
The second skin deals with the history of arrival and absorption into host communities. If only 150 sqm were to be allowed per continent, this space would need to be 750 sqm.

As far as the changing pod displays in the third skin are concerned, it is not yet clear how many are required/can be afforded but a subject like the Irish influence on world music could hardly be done justice to in less than 400 sqm. Others could be smaller, say between 150-200 sqm, but one could easily envisage five or more topics if a rounded picture of Ireland's influences on world culture is given. The third skin would therefore need in the region of 1,200 sqm.

A central orientation/introduction space could be between 250-350 sqm.

In addition to the allocation of c. 3,000 sqm for the main exhibition, a further 500 sqm should be provided for temporary exhibitions.

Figure 4: Attraction Comparative Sizes



A Virtual and Web Presence

It is difficult to think of a museum, visitor attraction, gallery, destination, or brand that does not have a web presence. This is the communication medium of choice for the majority. And this is no surprise. Whilst physical outlets are restricted by the location or how far they can travel, the power of the virtual world is that it is boundless.

The new centre for the Irish Diaspora must be supported by a virtual presence.

At the outset, it is worth clarifying that there is a distinction between an attraction with a web site and a virtual attraction. Simply put, a virtual attraction (or centre, or museum) is an online exhibition and resource. It has no physical presence and while it might include a number of components, all its assets are virtual. It is distinct from a regular attraction web site by virtue of the fact that it is not aligned to a physical space in any way.

By contrast, an attraction with a web site might use its virtual presence to introduce, characterise, reflect and promote its destination, its content, its brand and its concept. The site is used to magnify the reach of the physical space and offer visitor information to and about the main site (or sites). It offers access to resources and content, activities and programmes and enables new connections with community members.

A good web site will work in harness with the physical institution and add an additional dimension that expands the museum's presence beyond that which is possible within the physical institution, its collections and programmes.

It is clear that the National Diaspora Centre needs to think about an integrated strategy that brings together its physical presence with a virtual one. Given this context the website might be designed:

- To connect the virtual visitor to Ireland, the Irish and concept of belonging
- To act as a portal for Ireland's Genealogical Resources
- To offer access to archival material (objects, imagery, interpretive and original texts, oral testimony, interactivity, works of art, stories)
- To include a social aspect / collaborative platforms such as an online research and opportunities to input conversations and contributions
- To include an educational experience
- To provide high-resolution virtual tours of the site galleries
- To personalise experiences
- To highlight programmes, events and activities
- To highlight partnerships (subject-related, regional, national and international)
- To connect with visitors using different online and multi-media tools – for consultation, contribution, collaboration or participation

Any online presence for the centre should also reflect the feel, character and sense of place of the Centre itself and provide:

- A unique experience with exciting user-friendly appeal
- Dynamic and intuitive software interfaces
- A fluid and intriguing interactive menu that enables exploration of rich content
- Layered content for different user types and levels of engagement
- Engaging ways to interact with the digitised collections
- Meet best practice accessibility and usability standards

The benefits of an online presence are significant and potentially far reaching and include:

- The creation of an online destination with a different feel from the Centre's physical home.
- The promotion of an inclusive approach and encourage user participation.
- Making the Centre seem more approachable.
- Making the Centre more meaningful to the public.
- Provision of access to content on demand.
- Deepening of visitor dialogue and engagement.
- Increased marketing of brand and image.
- Better position the Centre competitively in the (already fragmented) market place.
- Provision of the opportunity for ongoing consultation.

Key Issues / Considerations

Needless to say there is a host of issues that require thought and considerations in moving towards the planning and technical set-up of a virtual presence. Whilst knowledge and understanding of technology and its capabilities are essential, what is more important is a clear strategy for the web site and how it relates to the Centre itself; what should it be, who should it serve and how will it evolve?

The following give an indication of some of the issues:

- What content is included on the website? Are there collections to be shown online? Are these digitised? How can online collections be protected?
- To what extent are the structure and content of the centre mirrored in the structure and content of the website? Can audiences 'visit' the exhibition(s) remotely?
- Who is the target audience? What is the demographic? How might the website reflect audience needs and be relevant to these audiences? Is any part of the website solely aimed at children specifically?
- Is the website open to all? Does it engage with the Diaspora community alone or is it open for all. Does it attract the right users? Does the website keep and attract new users?
- Is the interface user-friendly? Does it use familiar, recurring and consistent navigational aids? Is the layout easy to follow and information easy to find?
- How future-proofed is the website? What level of flexibility is provided?
- How personalised is the website? Does it prompt needs and interests (the Amazon model)?

- Can users take a virtual tour of the Centre?
- Can users input text, stories, opinions, interpretations, recorded conversations, pictures, video content? If yes, how will the Centre collect appropriate material? How will it facilitate and respond to user generated content within reasonable time? How will contributions be moderated? Does the website encourage connections between experts and the general public? Does it enable visitors to co-curate (online) exhibitions?
- Is the website compatible with other multimedia devices such as mobile phones?

Genealogy at the NDC

Many of the players in the genealogical space were interviewed during the consultation phase as it was considered that there was a large untapped tourism market for genealogy and that it would form a key market for a National Diaspora Centre.

Those working in genealogy were very positive about the idea of a National Diaspora Centre because they saw it as a physical space that would enable them to provide their expertise in interpreting records for individuals interested in finding their roots. The genealogical industry is highly fragmented and there was a belief amongst the genealogists that the online aspect of the Centre would provide the single portal for genealogical research.

There are many reasons why genealogy is not a primary driver of the National Diaspora Centre:

- Market research shows that the potential for genealogical tourism is much smaller than anticipated.
- To attempt to create a single portal for genealogical records would represent an overlapping of resources. The Department of Arts, Heritage and Gaeltacht is working towards the creation of a single portal at www.irishgenealogy.ie. At the same time, www.findmypast.ie is attempting the same from a commercial perspective.
- The National Library Genealogy Advisory Services is a highly rated and popular service (13,000 people used the service in 2001) providing individual guidance on genealogical research. Other organisations providing services in this area are listed in Appendix 3.
- Genealogy is an individual's search for an ancestor and also a search for 'place' – the family's historical homestead. With the increasing digitization of records and their availability online (either free or paid for) people tend to complete their research online and then, if really interested, visit the homestead rather than a visitor attraction.

- Genealogy is about having roots in Ireland and the consultations suggested that people's affinity with Ireland is broader than one purely based on blood ties.

While genealogy should not be the primary driver of the National Diaspora Centre, there is potential for a more accessible and fun presentation of the subject. A number of the proposed Diaspora Centres – notably Cork and Dún Laoghaire – contained the idea of including genetic genealogy or DNA testing. In 2010 it was used to identify the remains of Australian soldiers from the First World War at Fromelles and allow them to be buried with full military honours. Three generations on, hundreds of relatives and descendants traveled from Australia to see their loved ones finally laid to rest. DNA testing relies on analysis of the Y-DNA that is passed on, along with a surname, down the male line. DNA surname projects are a natural partner to genealogy research. Because both surnames and y-DNA are passed from father to son down the generations, bringing together lots of people who share the same family name offers the opportunity to find matches, compare genealogical findings and extend family trees. Scoping out the possibilities for DNA testing all visitors to the NDC should be explored.

Operations at the National Diaspora Centre

This section provides an overview of key considerations regarding the operation of an NDC. Since there are many unknowns at this point, the discussion is necessarily focused on general principles.

Ownership and Organisation Structure

Promoter / Owner

The organisational structure and business model for the NDC will depend on the organisation(s) promoting it. The main options for promoter are:

- an existing local authority or other public body
- a new body established by an existing public body
- a private sector promoter
- a public-private partnership.

Existing Public Body: the majority of the organisations who are proposing to develop an NDC are public sector bodies, mainly local authorities. However, few, if any, are proposing to operate the NDC directly within their existing organisation structure. The generally preferred approach is to establish a subsidiary corporate entity, usually in the form of a company limited by guarantee, that would take on the development and operation of the Centre.

New Public Body: the development and operation of the NDC could be assigned to an independent, new public body, created specifically for this purpose. Such a corporate entity, as a commercial public body, would have to be established either by or pursuant to statute (e.g. ESB, funded by statute, or Dublin Port Co., established pursuant to the Harbours Act 1996.), or as a subsidiary company to an existing body (e.g. Viking Triangle Trust in Waterford), or as an independent entity established by one or more existing public bodies (e.g. Titanic Foundation Ltd. which owns Titanic Belfast).

Private Sector Promoter: a number of the NDC proposals - e.g. CHQ and Birr Workhouse - are being promoted by private sector interests. The promoters intend to establish a limited company to develop and operate the NDC.

Public-Private Partnership: a number of the public sector promoters have indicated that they plan to raise money from private investors and/or philanthropic sources. To facilitate this, they intend to set up a company which may be limited by shares, if they are securing investors, or by guarantee if they plan to seek charitable status and attract philanthropic donations rather than commercial investment. The contributions by partners to the public-private venture could be in the form of cash, property or other hard and soft assets. A public-private partnership could also be created in the delivery of the project through one of a number of contract options, including Design and Build, Design/Build/Operate or Design/Build/Operate/Finance.

Management Company

Most of the ownership options listed above ultimately involve the creation of a private limited company to own and operate the NDC. In cases where the public sector is involved, it is likely that the company would be limited by guarantee. In such a company, all profits would be retained for the future maintenance of the Centre and to build a fund to renew the exhibition on a periodic basis.

If the Centre is to hold valuable collections, the latter might be protected by retaining their ownership in a separate entity or trust which then lends collections to the management company for exhibition and maintenance. Such a structure is applied by the Hunt Museum in Limerick. Another approach would be for the owner of the facility – building and contents – to lease or licence the facility to an operator, again to protect the primary asset in the event of an operational failure. This model has been used at a number of attractions including Titanic Belfast.

If established on a not-for-profit basis, the company should seek charitable status to enable it to attract donations under favourable terms and to be granted exemptions from certain taxes, including corporation tax, income tax, deposit interest retention tax, capital acquisitions tax and stamp duty. The ‘advancement of the arts, culture, heritage or science’ is defined as a charitable purpose by the Charities Act 2009; this Act has yet to be implemented in full. The Minister for Justice recently announced further deferral on the grounds of cost. In the interim, cultural activities may be eligible for charitable tax exemption under the ‘advancement of education’ category. To gain exemption, the company, inter alia, must satisfy the Revenue Commissioners that its income and property will be applied for charitable purposes only,

and that it is bound to these purposes by its governing instrument, i.e. its memorandum and articles of association. The company will assume full responsibility for the management of the NDC. Its responsibilities will include:

- the operation and maintenance of the NDC and its exhibits.
- the development, organisation, management and marketing of tourism, education, cultural and commercial activities, including the organisation of events and temporary exhibitions.
- recruitment, training and management of necessary staff.
- development of partnerships with key stakeholders in the Diaspora and tourism fields, including academic institutions and other Diaspora centres and initiatives.
- the security of the NDC, and the safety of employees, tenants and visitors to the Centre.

The board of the company should comprise nominees of the major stakeholders/funders of the project. It will be important to ensure that the board includes an appropriate mix of skills and experience among its members so that it can guide the future management and development of the NDC successfully. It needs to be efficient and certain in its decision-making and be capable of bringing influence to bear on other bodies where required by the interests of the NDC.

In addition to the members nominated by major stakeholders, provision might be made for a number of further members who may be co-opted by the board. This would enable the board to ensure that there is a good balance of relevant skills and experience among the directors. It may be noted that most of the current proposals for an NDC do not include specific visitor attraction management expertise or commercial tourism experience in their project teams. Such expertise is highly desirable for a new visitor attraction.

The board would have overall responsibility for the governance of the company, including its strategy, operations, staffing and finance. In order to work efficiently, it would be useful to establish committees of the board covering, for example, marketing, development and finance. This committee structure would facilitate a more even distribution of the overall workload among directors. Moreover, it would not be necessary that the committees be comprised solely of board members - non-board members could also be invited to participate in order to enhance the skills and experience available. This would be particularly valuable in relation to planning and programming exhibitions and cultural events.

Management and Staffing

The management team at the NDC will comprise the following:

- Chief Executive
- Operations Manager
- Exhibitions Manager / Curator
- Marketing Manager
- Finance Manager
- Heads of genealogy, education and events.

An illustrative organisation structure is provided in Figure 5. The organisation is structured into 5 main operating departments: Operations, Marketing, Retail, Administration and Genealogy. Catering operations are assumed to be let to a specialist contractor. There would be flexibility in the staffing of each front-of-house section, with staff being enabled to move between visitor experience guiding, box office, retail and events. This would enhance the skills of front-line staff, offer a more interesting work experience, and facilitate rostering and operational management.

It is envisaged that the Centre would operate on a year-round basis. The core management and staff team would work year-round, and would be augmented by seasonal staff for the Easter – October season.

The management and staff complement necessary to operate the NDC efficiently and successfully is based on an assessment of the functional requirements and the labour time inputs. The assumption is that the Centre will be open 7-days a week, for 361 days a year; opening hours will extend from 10 a.m. to 5 p.m. in the low season, and 9 a.m. to 7 p.m. in the summer and shoulder months. Based on a detailed analysis, the staff complement is assessed at 34 full-time positions, supported by defined pools of 9 seasonal and up to 14 casual part-time staff. The latter group would be on zero hours contracts to allow for the flexibility essential to efficient operation. The distribution of the staffing complement by category is set out in Table 11.

Figure 5: NDC Organisational Structure

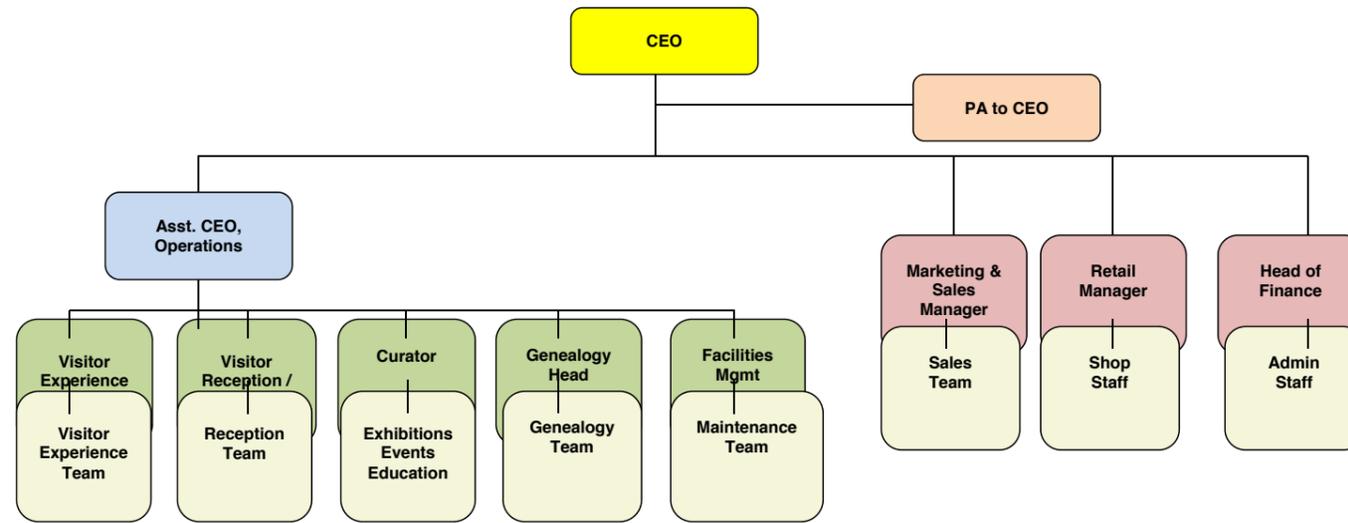


Table 11: NDC Staff Complement

	No. of Employees	Full Time	Casual / Seasonal Pools
Chief Executive	1	1	
Assistant CEO/ Operations Manager	1	1	
Exhibitions Manager/ Curator	1	1	
Events & Programming Head	1	1	
Education & Outreach Officer	1	1	
Genealogy Head	1	1	
Genealogy Assistant	1	1	
Genealogy Team - seasonal	2		
Visitor Experience Head	1	1	
Visitor Experience Team - full time	5	5	
Visitor Experience Team - seasonal	2		6
Visitor Reception Head	1	1	
Admissions & Ticketing - full time	5	5	
Admissions & Ticketing - seasonal	3		4
Marketing Manager	1	1	
Marketing/Sales Assistant	1	1	
Retail manager	1	1	
Shop staff - full time	3	3	
Shop staff - seasonal	2		4
Finance & Admin Manager	1	1	
Accounts Assistant / Credit Controller	1	1	
Administration Support Staff	2	2	
Secretary / PA to CEO + Asst. CEO	1	1	
Facilities Manager	1	1	
IT Specialist	1	1	
Maintenance	2	2	
Total Staff	43	34	14

Detailed projections are provided in Tables A2.1 – A2.5 in Appendix 4. The underlying assumptions and a summary of the main points are presented in this section. It should be noted that, as is the case with any projections, achievement of the results indicated is entirely dependent on the various explicit assumptions being fulfilled. While these have been calculated carefully and conscientiously, and with reference to extensive research and experience, there can be no guarantee that they will be fulfilled. Reference should also be made to the disclaimer at the beginning of Appendix 2.

Visitor Numbers

Introduction

Making projections of the number of visitors that a future attraction will draw is an inexact science. There are numerous examples of museums and other heritage attractions that have achieved visitor numbers far below the over-ambitious targets that had been set for them. The experience of these attractions has provided a useful set of reference points and has given rise to a greater sense of realism in the planning of new cultural attractions. By the same token, a number of attractions that have opened in recent years have outperformed their pre-opening projections – for example, Titanic Belfast, Tayto Park and the Titanic Experience Cobh. In general, the majority of leading visitor attractions in Ireland have achieved good results over the past two years as tourism has picked up.

The following factors have a significant influence on demand:

- the inherent drawing power of the attraction (content, presentation, etc.)
- location and access
- overall expertise and experience of management/promotor's team
- supporting attractions and other facilities
- pricing
- marketing
- overall market size.

The inherent drawing power of the visitor centre

The inherent drawing power of an attraction is derived from its theme, content, how this is presented, its overall scale and the range of visitor services and facilities on offer. Themes of local interest tend to attract local audiences, whereas themes of international interest - which include those of the NDC - have much greater drawing power. The nature of the content and its presentation are also critical factors - are there unique features, is it authentic, and does it have a wide market appeal? Scale is also relevant: small attractions tend to have small audiences. Moreover, even if the content is a compelling draw, small size will limit capacity. The NDC must respond well to all of these criteria – uniqueness, authenticity, market appeal and scale.

Location and Access

The primary factors to consider in location choice were outlined on page 29. These are vital considerations for any tourist facility and it will be essential that the NDC be located where, or very close to where, there is a significant tourist footfall. Proximity to a large residential population is also important. Distance from tourism hubs, main roads and cities impacts heavily on the potential demand for an attraction. Remote attractions must be of destination standard, offering a sufficient range of features and activities to promote longer dwell-times and thus make the journey worthwhile. Experience suggests that entertainment attractions have greater appeal than museums, brand centres and education attractions in terms of drawing people over longer distances. Ease of access to an attraction and around its features is also an important consideration, and a location adjacent to main transport arteries and public transport services should be preferred.

Supporting attractions and other facilities

Experience shows that isolated attractions can find it difficult to draw large numbers. Those in locations where there is a range of retail outlets, cafés, bars and other attractions as well as accommodation, tend to have greater levels of visitation due both to higher footfall in the surrounding area and the perception among potential visitors that there is a lot to do in the area. The NDC would benefit from a location close to other significant attractions which have high visitation levels.

Marketing

It is evident from the experience of other sites that marketing plays a significant role in building visitor numbers. The most successful sites are also those with the most effective marketing. For this reason, we have made provision for a substantial marketing budget in the financial projections. The marketing message is highly influential. Even one glimpse at the cover of a brochure or a logo can be enough to convey the impression of whether a visitor attraction would welcome particular groups. The marketing messages implicit in all communications will help determine the audience. It is assumed for the estimation of demand that the marketing messages will be broad and appealing to a wide audience.

Total market size and repeatability

The total size of the market and key target market segments both defines opportunity and sets limits to that opportunity. Tourist attractions with high levels of visitation tend to be located in or near large population centres – the principal exceptions are major natural heritage sites, such as the Giant’s Causeway, Glendalough and the Cliffs of Moher.

The effective size of the available market can be significantly increased if the NDC attracts repeat visits. This will depend on the quality and range of the visitor experience and whether the exhibition and supporting facilities and services provide a rich enough experience to warrant repeat visits.

Pricing

This is an important factor - the experience in the Irish visitor attraction industry is that the market is price-sensitive and few sites command premium prices. The Guinness Storehouse is a good example of a premium-priced site, and CHL Consulting have very recently conducted a detailed analysis of its pricing strategy. CHL have also advised on pricing at Titanic Belfast for 2013-2014. Premium prices can be justified by scale, strong market positioning, unique content and long dwell times. However, attractions that may not have this combination of attributes must pitch their prices at a level consistent with prevailing market rates. The price points selected for the NDC place it at a level below the premium sites, but consistent with quality products offering a rich experience with an extended dwell-time.

Experience of Other Attractions

In addition to the factors outlined above, the experience of relevant attractions also informs the projection of visitor numbers. Table 7 (page 12) shows the number of admissions to leading cultural attractions in 2011. On the assumption that the ambition of the NDC is to be a major cultural attraction for both the domestic and overseas tourist markets, and also assuming that a positive stance is taken to the factors noted above, it is reasonable to project admissions to the NDC at comparable levels to mainstream cultural attractions in Ireland.

Co-Location to Increase Visitor Numbers

The number of visitors to the NDC could be increased significantly above the projected 300,000 if it is co-located, or shares a building, with a complementary cultural facility. For example, co-location with a major traditional music and/or dance performance and exhibition centre would contribute directly to the generation of potentially a much larger number of visitors to the NDC, especially if attractively-priced joint ticketing options were offered. A number of the proposals for an NDC incorporate such a concept. Of course, co-location implies the need for a much larger building, or complex, to house both facilities.

Summary

In assessing the demand potential for the NDC, we have assumed that the above points will be taken into careful account in locating and developing the NDC. We have also considered the experience of other attractions in Ireland and diaspora centres in other countries. In the light of these considerations, we have applied appropriate market penetration rates to each of the major market segments to arrive at a projection of visitor numbers. The penetration rates applied are at the lower end of the range for leading attractions, and are specified in Table A2.2a of Appendix 4.

Based on this analysis the projected visitor numbers are as follows:

Year	General Admissions
1	300,000
2	275,000
3	290,000
4	305,000
5	320,000

The pattern of demand reflects a surge in year 1, responding to the novelty of the attraction, curiosity about its content and strong advance marketing. This falls back by about 10% in year 2 and, thereafter, increases by about 5% a year in line with overall tourism market growth.

In absolute terms, the levels of demand projected are considered realistic in the light of the visitor experiences and products on offer, and the broad market appeal of these. The unique qualities of the NDC, the size of the target markets and the performance of tourist and leisure attractions elsewhere in Ireland support these demand projections. A breakdown of the composition of demand is provided in Table A2.2a, Appendix 4.

Capital Costs

The capital costs of the NDC will depend on the approach taken to its establishment. The principal possibilities, in descending order of likely costs, are as follows:

- Construct a new building of 6,000 sqm containing a 3,000 sqm exhibition.
- Conversion of an existing building of suitable size, condition and configuration to contain a 3,000 sqm exhibition with supporting visitor facilities (café, shop etc.) and ancillary functions (temporary exhibition space, lecture/performance space etc.)
- Installation of the exhibition at an existing cultural or educational facility where there is sufficient suitable space available, and there is the possibility of giving the NDC a distinctive brand.

Further front-end capital cost adjustment may be achieved by:

- Reducing the size of the exhibition area.
- Diminishing the quality and sophistication of the exhibition.
- Reducing the size and/or range of supporting visitor facilities and ancillary functions.

It is possible, in considering the above options, to envisage the capital cost of the project ranging from around €5 million to €26 million, or more. It is difficult to conceive of the establishment of an NDC of any stature for less than €5 million, with the actual final cost depending on location, scale and specification.

For the purposes of the financial analysis in this report, we have included only the cost of the exhibition itself. The recommended exhibition space allocation is 3,000 sqm. The cost of exhibition design, construction and installation is put at €4,000 per sqm which would produce a high specification exhibition of a standard comparable with that at Titanic Belfast.

Table 12 gives an indication of the type of exhibition fit out relative to the cost per square metre, while Table 13 summarises some of the advantages, disadvantages and possible costs of locating the National Diaspora Centre in a purpose-built building, within an existing building or installing it into an existing institution. It should be noted that these costs are broad, indicative estimates only, subject to considerable revision when the specific details of a project are known.

Table 12: Exhibition fit out relative to cost per sqm

Projects	Notes	Cost per sqm
The Art of the Book at Chester Beatty Library	Traditional. High quality objects and finishes. No interactivity.	€3,500
Riverside Transport Museum, Glasgow	Large objects in open space, flexible displays, interactives	€4,000
Kuwait Oil Company Centre, Ahmadi, Kuwait	High quality, heavily interactive brand centre with strong, immersive AV	€6,000
ARAS, Aras an Uachtarain, Dublin	High quality finishes	€7,000
King Abdullah Petroleum Studies & Research Centre, Riyadh	Very high-tech interactives and finishes - very small area	€12,000
Bahrain National Charter Monument	Immersive AV, high-tech interactives and exceptional finishes	€14,000

Table 13: Options for the Development of a National Diaspora Centre

	Advantages	Disadvantages	Possible Cost Range
1) New Building	<ul style="list-style-type: none"> • Purpose-built • Could create an iconic building • Possible to choose a suitable location • Could include other, complementary uses. 	<ul style="list-style-type: none"> • High cost (depending on building specifications) • Long development time including design and planning stages. • If design is very specific, may be difficult to convert to an alternative use if NDC fails. • Site purchase adds to total cost. 	<ul style="list-style-type: none"> • €20m to €30m, assuming high exhibition specification at €4,000 per sqm over 3,000 sqm (€12m) – this could be reduced if the size and/or specification of the exhibition were reduced.
2) Existing Building	<ul style="list-style-type: none"> • Cost-saving, if building in good condition and suitably configured. • Potential to use an historic building to gain presence. • Co-location with complementary uses/attractions, if building is large enough. • Faster development time, if no major planning issues. 	<ul style="list-style-type: none"> • Risk of high cost escalation if building condition is poor and/or very extensive conversion works are required. • May be very limited choices of location available. • Building acquisition cost high, but possibly avoidable if part or all of the building is leased, or if a potential operating partner already owns the building. 	<ul style="list-style-type: none"> • €13m to €25m, but risk of exceeding this; again assumes high exhibition specification of at €12m – reducing the specification would lower this cost, but less than €5m for the exhibition would probably be too low for major impact.
3) Install exhibition into an existing institution	<ul style="list-style-type: none"> • Speed of implementation. • Potential operator already on-site. • Cost savings, although the site-owning institution may seek licence or lease fees. 	<ul style="list-style-type: none"> • Few suitable choices available. • Costs may rise if extensive conversion or refurbishment works are necessary. • Risk of invisibility or lack of presence if NDC is subsumed into a larger entity. • Challenges may arise in ensuring the institution operates the NDC in accordance with the goals of its sponsors. 	<ul style="list-style-type: none"> • €5m to €15m, depending on exhibition specification and size, and enabling works required.

Operating Revenue and Cost Assumptions

The main assumptions underlying the projections are detailed in the tables in Appendix 4. Key points to note are as follows:

Pricing: admission ticket prices are based on the pricing structure in Table 14 which is consistent with prices charged at leading attractions regionally and elsewhere in Ireland. The key issue is the overall yield achieved, as this takes into account discounts and the visitor mix. Allowance for discounts is included in the substantial provision for concessions. The yield averages just under 70% which reflects a high proportion of adults in the visitor mix.

Evening events: revenue based on 12 events in year 1 increasing to 20 in year 2 and 26 per annum thereafter, with admissions averaging 80 per event. Additional revenue is earned from F&B and retail sales to audiences.

Shop sales: based on an average transaction of almost €2.45 per visitor, net of VAT. This is within the average range for visitor attractions.

Café concession: based on 12.5% of turnover (10% in year 1). This is towards the lower end of concession fees – e.g. tenders for catering services at Titanic Belfast offered fees ranging from 12% to 21%. The per capita expenditure level of €2 in the café is below the average for leading visitor attractions (€3.50).

VAT: is charged at 9% on admissions and 23% on other sales.

Inflation: included at an average rate of 3% per annum.

Gross margins: assumed to be 50% on shop sales and 97% on admissions. [The 3% direct cost of admissions covers ticket printing, credit and debit card charges.]

Staffing: assumed to be at 100% of full complement from year 1, in accordance with the staff schedule in Table A2.4, Appendix 4. Wages and salaries are set at prevailing rates for visitor attractions.

Repairs and maintenance: charged at 5% of total income.

Professional fees: allowance for auditing / accountancy and other professional services (e.g. architecture, engineering, market research / audience surveys, management consultancy etc.)

Other operating costs: estimates based on the scale and type of activity.

Depreciation: depreciation is charged in accordance with the schedule in Table A2.5, Appendix 4. This is based on a 3,000 sqm exhibition at €4,000 per sqm, which is in line with the cost of the exhibition at Titanic Belfast.

Table 14: Proposed General Admission Prices (incl. VAT)

	€
Adult entrance fees	12.50
Concessions (OAP/student)	9.00
Child entrance fees	7.00
School/group entrance fees (per person)	5.00
Family entrance fees (2+2)	32.00
Adult group entrance fees (per person)	8.00

Technology relationships: Technology and sponsorship

Much of the AV and IT equipment in the Centre will be supplied as standard equipment, designed to carry out the right functions and be sourced through companies that can provide an integrated solution with experience and back up for service. However, for the Centre, we believe that company sponsorship could be very attractive, but this should be in the form of sponsorship for content and funding, rather than donated equipment.

Where technology sponsorship does provide exciting opportunities, is where a technology company offers intellectual property or content that can be used. For example, a large technology company like Google can provide access to powerful search facilities and databases that would be impossible to reach on a normal commercial basis, if they could be approached and interested in the Centre. Other technology companies with a strong employment base in Ireland could also be interested to provide additional funding, again on a reciprocal basis, to promote their role in employment and maintaining family life in the region. Initial conversations with Google and Twitter suggest that they are keen to be engaged in working on the project as it moves forward.

Results and Conclusions

A summary of the projected operating results for the NDC over its first five years of operation is provided in Table 14 in accordance with the assumptions listed above together with those detailed in the Tables in Appendix 4 (Tables A2.1 – A2.6).

This preliminary financial analysis indicates a potential to be sustainable in operations once the admissions targets are reached. The project could also generate a sufficient surplus to provide for periodic renewal of the exhibition and other features, which would be essential to its long-term sustainability. However, it is evident that the project could not service significant debt, nor could it provide a commercial return to investors. This means that it will need to generate its capital finance from non-commercial sources – i.e. from grants or philanthropic donations with, perhaps, a very modest level of debt.

The relationships and communication channels opened for Ireland during the many Gathering events this year could be fostered and further developed through a National Diaspora Centre, which could act as a permanent location for that legacy, to the overall benefit of Ireland.

Risk Factors

The development of new visitor attractions carries significant risk. They are very expensive to establish and cannot easily be developed in a cautious, phased way. A certain minimum level of content must be in place from opening day to attract consumer interest – if an attraction is not well-received when it first opens, it is very difficult for it to establish subsequently a stronger market position, even if a lot more money is spent on improvements. The following are major risk factors:

Capital Cost overrun: the project may be under-budgeted at the outset through inadequate specification, which has to be remedied, or because of unforeseen factors such as problems with the site or existing buildings that were unknown at the time of costing. Changes may also be made to the specifications during construction, which add to costs, or unforeseen input material price increases may arise. Accurate specification and building surveys are vital, as is effective project management.

Construction: the building quality and exhibition fit-out do not meet required standards and consumer expectations. Post-construction correction may be possible, but this will add to costs.

Visitor numbers: it is impossible to predict visitor numbers to a unique, new attraction with precision – the margin of error is high. Advance market testing can increase the confidence in projections. However, the challenge with a new visitor attraction is that consumers cannot really test and assess the experience before it is built; up to that point, all that is available is imagery and text, which essentially force consumers to imagine a future experience. The findings of such advance research must be treated with caution.

Market conditions: the operating environment may change significantly between the date a decision is made to build the attraction and the date the doors actually open for business. The consequences of negative external developments such as economic recession can be a failure to achieve visitor number and/or targets.

Operations: operational problems may arise in a number of areas including, inter alia, a failure to deliver a good visitor experience due to poor management and inadequate staff training, poor operating cost control, poor operating standards and unforeseen operating problems with the building, exhibition and/or other visitor facilities. Appointing experienced management, ensuring staff are well trained, and ensuring that contractors, suppliers and maintenance personnel meet required standards are essential measures.

Table 14: Summary of Projected Operating Results

	Year 1	Year 2	Year 3	Year 4	Year 5
Admissions	300,000	275,000	290,000	305,000	320,000
Revenue	3,681,021	3,503,267	3,812,830	4,128,189	4,459,039
Cost of sales	486,592	449,919	488,923	529,574	572,223
Gross profit	3,194,429	3,053,348	3,323,907	3,598,616	3,886,816
Total expenditure	2,592,810	2,650,141	2,740,355	2,825,617	2,913,753
EBITDA	601,618	403,207	583,552	772,999	973,063
Depreciation	1,275,000	1,275,000	1,275,000	1,275,000	1,275,000
Surplus net of renewal reserve	-673,382	-871,793	-691,448	-502,001	-301,937

Appendix 1: List of Consultees

Association of Professional Genealogists
Helen Kelly

Bank of Ireland
Brian Wickham, Head of Branches

Clans of Ireland
James O'Higgins Norman

Cork City Manager
Tim Lucey

Cork County Manager
Martin Riordan

Department of Arts, Heritage and Gaeltacht:
Niall O'Donnchú
Chris Flynn
Kevin Lonergan
Sharon Barry
Orlaith Gleeson

Department of Tourism, Transport and Sport:
John Kelly, Principal Officer
Brian Murphy, Special Advisor to Minister
Leo Varadkar T.D.

Diaspora Studies
Kingsley Aikens

Dublin City Council Diaspora Project
Brendan Kenny, Assistant City Manager
Bruce Philips, Assistant Area Manager
Edel Flynn, Chief Operating Officer, The Digital Hub

Dun Laoghaire Harbour Company
Gerry Dunne

Eneclann
Fiona Fitzsimons, Research Director

Fáilte Ireland Research Team
Caeman Wall / Nessa Skehan,

Findmypast
Brian Donovan

The Gathering
Jim Miley, Project Director
Tim O'Connor, Chairman

Glasnevin Trust
George McCullough, CEO

Google Ireland
David Geraghty, Director Small and Medium Business Sales. David is Google's representative on the The Gathering.

Irish Family History Foundation
Karel Kiely

Irish Heritage Trust
Kevin Baird, CEO

Irish Times
John Grenham

Irish Tourist Industry Confederation
Eamon McKeon, CEO

Irish Tour Operators Association
Ruth Andrews, CEO

Limerick City Diaspora Project
Tom Enright, Director, Economic Development & Planning
Kieran O'Donnell, Fine Gael, Member of Oireachtas
Eileen Humphreys, University of Limerick
Pat Fitzgerald, Senior Executive Officer, Limerick Council
Michael Tiernan, Limerick Business man
Lorna Moloney, University of Limerick
Eoghan Prendergast, Shannon Development
Helen O'Donnell, Limerick City Business Association

Mellon Centre for Emigration Studies
Brian Lambkin, Director

National Archives of Ireland
Caitriona Crowe

National Library of Ireland
Fiona Ross

National University of Ireland, Maynooth
Philip Nolan, President
Mark Boyle, Professor of Geography, Head of Department
Marion Lyons, Professor of History, Head of Department

Riverdance
Moya Doherty

RTE / Entertainment
John Bowman, Chairman of Diaspora Centre Advisory Group
Mike Murphy, entertainer

Shannon Development Projects
Flann Quilligan, Shannon Development, Tourism Product Development Manager

Tipperary Crystal
Declan Fearon

Tourism Ireland
Mark Henry

University College Dublin
Pat Cooke

World Irish
John McColgan

Appendix 2: International Benchmarks

Heritage / Cultural Attractions with Diaspora Connections

	Form/Function	Visitor Numbers
Beit Hatfusot Museum of the Jewish People, Tel Aviv	<p>Beit Hatfutsot is the National Centre for Jewish communities in Israel and around the world and this interaction gives the overall project its multi-dimensional appeal and strength.</p> <p>Of the building's expansive 17,000sqm, some 4,200sqm is dedicated to the new Museum of the Jewish People. There is palpable energy about the place and the new café, good footfall, strong temporary exhibition programme and burgeoning education activities all illustrate that Beit Hatfutsot is on the cusp of something special.</p> <p>The goals and ambitions of the project are striking. The facility has at its heart the exploration of the question of what it means to be Jewish and how that is given personal reality through the concept of Jewish Peoplehood. The Museum of the History of the Jewish People will be the anchor of the redeveloped Beit Hatfutsot.</p> <p>The core exhibition is currently undergoing a massive renovation and is due to re-open in 2015. The Museum seeks to explore the full 4,000 year history of the Jewish People not as an end in itself, but as a means to arouse curiosity, stimulate thinking, enable an informed dialogue of what it means to be Jewish. A central objective is to connect Jewish people from around the world to their roots. This is a powerful agenda.</p> <p>Ongoing programme of temporary exhibitions of Jewish culture, stories, events around the world. Some of these have seen huge success and brought high visitor numbers</p> <p>Strong education programme including 'The School of Jewish Peoplehood Studies' which is taught at Jewish Institutions globally.</p> <p>Family Gallery features a hugely successful interactive exhibition on the Hebrew language.</p> <p>Online Virtual Museum project is underway. The aim of the virtual museum is to cultivate a sense of Jewish Identity among the global Jewish community by allowing access to archives and databases, but also by allowing users to add information, images etc. of their own.</p> <p>Strong ties with influential Jewish Diaspora.</p>	<p>There were over 200,000 visitors to Beit Hatfusot in 2011.</p> <p>70% of the visits are made by Israeli residents and of the balance the majority are from the United States. 20-25% of visitors are Orthodox Jews and over 25% come in school or other groups. Only about 10% of visitors are made by non Jews.</p> <p>Admission: NIS 42 (adult)ww</p>

	Form/Function	Visitor Numbers
The Migration Museum, Adelaide South Australia	<p>The Migration Museum is located in central Adelaide next to the State Library. The Migration Museum's aim is to work towards the preservation, understanding and enjoyment of South Australia's diverse cultures. It is 'a place to discover the many identities of the people of South Australia through the stories of individuals and communities.' Their programme includes permanent as well as temporary exhibitions, education programmes, talks and tours. There is a shop on site and the venue is available for hire.</p> <p>The Museum's collections are at the heart of the Museum. The collections policy is to gather objects that relate in some way to migration stories, cultural heritage or the history of the current site of the Museum.</p>	<p>Admission is free</p> <p>Visitors: 156,000 in 2011</p>
Bremerhaven German Emigration Centre	<p>Situated at a historic site in the New Harbour, Bremerhaven, which opened in 1852, and which was the departure point for approximately 1.2 million emigrants to the New World by 1890. The New Harbour was adjacent to the Old Harbour, the Imperial Harbours and the Columbus Wharf, all departure points for the 7.2 million emigrants who sailed for the New World from Bremerhaven. The museum came about as a collaboration with Ellis Island. It was also marketed at Ellis Island with a joint exhibition: 'A Gateway to Ellis Island'.</p> <p>BGEC is designed as an immersive experience. The admission ticket, an iCard, is an electronic boarding pass which allows visitors to embark on a personal journey of 300 years of immigration and emigration history. Each iCard contains the story of an individual who either emigrated to the New World or found a new home in Germany. The iCard also activates many audio stations and interactive displays.</p> <p>Exhibits and displays include object displays, a 1950s style cinema, and a <i>Kids World</i> section.</p> <p>There are opportunities for visitors to trace their roots through access to international genealogy databases, all of which are already available online.</p>	<p>The first year saw 220,000 visitors. 2% of these were from America.</p> <p>Now approximately 500,000 visitors annually.</p> <p>School visits and education programme keep numbers up year round.</p> <p>Admission: €12.30 (adult)</p>

	Form/Function	Visitor Numbers
Ellis Island Immigration Museum, New York	<p>The Ellis Island Immigration Museum New York was opened in 2001 and is part of the Statue of Liberty National Monument.</p> <p>From 1892 to 1924, Ellis Island was America's largest and most active immigration station, where over 12 million immigrants were processed. The museum is located in the Main building of the former immigration station and is described as an 'exciting family research facility' that 'provides visitors with advanced computer and multimedia technology, printed materials, and professional assistance for investigating immigration history, family documentation, and genealogical exploration.' The visit begins with a 45-minute audio tour that invites visitors to relive the immigrant experience as if they were a 'new arrival'.</p> <p>The experience also includes self-guided exhibits as follows:</p> <ul style="list-style-type: none"> • 'Journeys: The Peopling of America Centre 1550-1890 (an exploration of arrivals in America pre-Ellis Island) • The American Flag of Faces (an animated flag filled with a montage of images submitted by individuals and their families) • The American Immigrant Wall of Honor (the longest wall of names in the world with more than 700,000 names) • The American Family Immigration History Centre (providing access to passenger records for 22 million people) • Temporary exhibits 	<p>1,892,419 total visitors to Ellis Island 2011-2012. Ellis Island is often visited as part of a tour which includes Staten Island and The Statue of Liberty. The Statue of Liberty received almost 3 million visitors in that year.</p> <p>121,504 people visited the Immigration History Centre. 91,128 searches were made at the centre. Website saw over 500,000 visits to the American Family Immigration Centre page.</p> <p>Admission: Free; Audio tours \$8</p> <p>Visitor numbers are from The Statue of Liberty-Ellis Island Foundation Annual Report, Fiscal Year Ended March 31, 2012.</p>

	Form/Function	Visitor Numbers
Immigration Museum, Melbourne	<p>Located in Melbourne's Old Customs House, the Immigration Museum displays a range of permanent exhibitions relating to identity, the common emigrant experience of journeys, emigrant timelines and stories.</p> <p>Temporary exhibitions focus on the culture and heritage of migrant communities. For example, an exhibition on the work of Irish photographer, David Monahan, chronicles the current generation of Irish immigrants across Australia.</p> <p>A Discovery Centre provides research facilities for those wishing to trace their ancestry. A vibrant education programme is linked to the National schools curriculum.</p>	<p>The year 2011-2012 saw record breaking visitor numbers of more than 140,000 at the Immigration Museum. The previous year saw 128,350 visitors.</p> <p>Admission: \$10 (adult)</p>

	Form/Function	Visitor Numbers
Museum of the African Diaspora, San Francisco	<p>Located inside St. Regis's new 42-story St. Regis Museum Tower, next to the San Francisco Museum of Modern Art, the Museum of the African Diaspora, opened in 2005.</p> <p>Displays focus on North America, the Caribbean, and South America, and trace the history of the African slave trade, African people's liberation movements in Africa and the New World, African music and its legacy in other musical forms, among other subjects.</p> <p>Programme of temporary exhibitions. Education Programme. Online Exhibitions.</p>	<p>125,000 visitors since opening in 2005. This equates to less than 18,000 a year.</p> <p>2010 Plan to increase visitor numbers to 60,000 annually by 2015.</p> <p>Admission: \$10 (adult)</p>

Archives and Genealogical Facilities

	Form/Function	Visitor Numbers
Irish Diaspora Museum at the Irish World Heritage Centre, Manchester	<p>The Irish World Heritage Centre has been in existence since 1986 as a focal point for the local and regional Irish community. A new contemporary building has been created costing €18 million was opened in 2012. The IWHC's vision is to establish a centre of excellence outside Ireland which provides unique visitor facilities, exhibitions, entertainment, sport and accommodation.</p> <p>A proposed Diaspora Museum, resting in the heart of the Irish World Heritage Centre will explore the concept of the Irish Diaspora and its consequences.</p> <p>Project awaiting funding.</p>	

	Form/Function	Visitor Numbers
Migration Museum Project, UK	<p>Proposals for the Migration Museum Project in the UK began in 2003. The project is still in the planning / funding stage. Barbara Roche, former Government Minister and long-standing advocate of the need for a National Migration Museum, chairs the project.</p> <p>The short-term plan is to create a temporary museum that will tour the country. The impetus behind the project is to cast immigration issues in a positive light and create a forum for discussion.</p> <p>The museum aims to document the story of migration in and out of the UK.</p>	

	Form/Function	Visitor Numbers
Scotland's People Centre, Edinburgh	<p>Records and Archives Centre dedicated to Genealogy and Family History including census, births, deaths, marriages, wills, testaments, church records.</p> <p>Virtual access on their online database. http://www.scotlandspeople.gov.uk/ Charges are according to document type.</p>	<p>Free taster sessions (2,402 users in 2012). Day tickets (21,441 users in 2012). Assisted Search Service (102 users in 2012).</p>

	Form/Function	Visitor Numbers
PRONI	<p>Public Record Office of Northern Ireland relocated in March 2011 to new premises in the Titanic Quarter. Holds public records as well as private archives. Like the NLI they have an onsite facility for people to come to research but do not offer an advisory service.</p> <p>Ongoing programme of exhibitions and events.</p> <p>The Ulster Covenant Archive and Freeholders Records are accessible online Online at http://www.proni.gov.uk/index.htm.</p>	<p>The number of on-site visitors for 2010/11 totalled 8,924 though this was during the transition from its former, smaller premises to the new building in Titanic Quarter. The number for the previous year was 17,628.</p> <p>There were 3,171 distance requests for documents during 2010/2011.</p>

	Form/Function	Visitor Numbers
UK National Archives at Kew, London	<p>Vast official archives of the UK holding over 1000 years of records, both digital and physical. Free entry to onsite visitors.</p> <p>Onsite Museum, 'The Keeper's Gallery', Research, Enquiry and Reading rooms.</p> <p>'Looking for a Person' page on website is geared specifically towards genealogical research.</p> <p>There is a drive towards digitizing records so as to make them available online. Figures demonstrate an overwhelming trend towards online access as opposed to physical visits.</p>	<p>The National Archives at Kew receive circa 90,000 site visitors annually.</p>

Appendix 3: Providers of Genealogical Services in Ireland

Name	Services Provided	Free	Online Presence
<u>National Library</u>	<p>The National Library currently provides the primary on-site resource for genealogical research and sees a large number of visitors (4 times that of the National Archives). Around half their visitors are North American and approximately 40% are British but there are also an increasing number of domestic visitors. Visitors are often novice genealogists who require a lot of guidance in reading the records to find relevant information. The National Library's Genealogy Advisory Service is unique among genealogy facilities in the free, personalised approach to guiding visitors and helping them find and read records. The genealogical services at the NLI is provided on contract by Eneclann in association with Ancestor Network. This service is very busy during the summer months when an additional genealogist is hired. There is usually a queue for this service during the busy months.</p> <p>Archival material includes: Catholic Parish Registers, property records, newspapers, published family histories, local history society publications, directories and heraldic records.</p> <p>Visitors to Family History Room 2012 6,050 2011 8,035 2010 7,083</p>	Yes	www.nli.ie/en/genealogy-advisory-service.aspx
<u>National Archives</u>	<p>The National Archives holds many records relevant to Irish genealogy and local history. The genealogical services at the National Archive is provided on contract by Eneclann in association with Ancestor Network.</p> <p>Archival material includes: 1901 and 1911 Census Records, Wills and Testimonies, transportation records, estate records.</p> <p>Visitor Numbers 841 over a 22 week period from August 30th 2012</p>	Yes	www.nationalarchives.ie www.census.nationalarchives.ie
Department of Arts, Heritage and the Gaeltacht	Offers free access to a selection of church records with plans to continue to add records and become a major free portal for Irish genealogy.	Yes	www.irishgenealogy.ie

Irish Family History Foundation	IFHF has an all-Ireland network of local county genealogical centres (there are 70 listed in their brochure). They originated at local level as a result of local interest and because local parish priests were often inundated with people asking for help finding their ancestral records. The first initiative was in Clare and the number of centres grew to a point in 1984 when the Irish Family History Society was formed, seeing its role as developing standard procedures for indexing records and shared resources where possible. It later changed its name to the IFHF. 1988 Government tourism task force had a Roots and Tourism element. The Irish Genealogical Project emerged from this and in 1993 a company was formed called Irish Genealogy Limited (which ceased to function in 2009). They continue to offer genealogical services and access to over 20 million online records.	No	www.rootsireland.ie
General Registrar's Office	Records of births, deaths and marriages dating back to 1864. Their office is located in Roscommon but can be searched online at their family research facility in the Irish Life Centre, Dublin 1.	No	www.groireland.ie
Irish Emigration Database and DIPPAM	Documenting Ireland: Parliament, People and Migration is an online virtual archive of documents and sources relating to Ireland and its migration experience during the C18th and C19th. It is made up of three databases including the Irish Emigration Database which can be cross referenced. It is a joint project between the Mellon Centre for Migration Studies, Queen's University, University of Ulster and The Libraries of Northern Ireland. As it only went online in 2011/2012 there are no user figures available at this time.	Yes	http://www.dippam.ac.uk http://ied.dippam.ac.uk
Find My Past	Comprehensive digitised records from census, births, deaths, marriages, passengers lists, military, newspapers, social organisations, etc. As a global website there is scope for cross referencing records from UK, US, and Australia.	No	www.findmypast.ie
Ancestry.com Operations Inc. (USA)	Website containing over 35 million Irish records. Also global allowing cross referencing of records from elsewhere.	No	www.ancestry.com

Family Search	Non-profit family history organisation historically known as the Genealogical Society of Utah which was founded in 1894. Its primary benefactor is The Church of Jesus Christ of Latter-day Saints that holds the largest database of genealogical records worldwide including over 33 million Irish records. There are 4,500 Centres around the world based out of their chapels including a growing number in Ireland – Limerick, Cork, Finglas, Londonderry, Coleraine, Belfast and a location in Galway that will open later this year. They offer services such as digital conversion, online indexing and preservation to record custodians.	No	www.familysearch.org
Eneclann	Offers family history research and genealogical services to private clients and media. The findmypast.ie website is being developed and operated by Eneclann in association with Bright Solid. Eneclann and Ancestor Network jointly also provide the genealogical advisory services at the National Library and National Archives.	No	Irish component of www.origins.net ; also findmypast.ie (see above) and www.eneclann.ie
PRONI	Public Record Office of Northern Ireland relocated in March 2011 to a new premises the Titanic Belfast Quarter. Holds public records as well as private archives. Like the NLI they have an onsite facility for people to come to research but do not offer an advisory service. Ongoing programme of exhibitions and events. The number of on-site visitors for 2010/11 totalled 8,924 though this was during the transition from their former, smaller premises to the new building in Titanic Quarter. The number for the previous year was 17,628. There were 3,171 distance requests for documents during 2010/2011.	Yes	The Ulster Covenant Archive and Freeholders Records are accessible online Online at http://www.proni.gov.uk/index.htm

National Diaspora Centre
Preliminary Financial Projections
Version 1.4
April 2013

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TABLE A2.1: NDC Preliminary Profit & Loss Projections

		Year 1	Year 2	Year 3	Year 4	Year 5
Total Visitor Numbers		300,000	275,000	290,000	305,000	320,000
Revenue net of VAT	Note	€	€	€	€	€
Admissions revenue	Table A2.2 Note 1	2,697,248	2,546,651	2,766,126	2,996,478	3,238,161
Shop sales	Table A2.3 Note 2	731,707	690,854	750,393	812,882	878,446
Guide books	Table A2.3 Note 3	52,500	49,569	53,841	58,324	63,028
Genealogy services	Table A2.3 Note 4	121,951	115,142	125,065	135,480	146,408
Café concession	Table A2.3 Note 5	60,000	70,813	76,915	83,320	90,041
Events programme	Table A2.3 Note 6	17,615	30,239	40,489	41,704	42,955
Total Income		3,681,021	3,503,267	3,812,830	4,128,189	4,459,039
Cost of sales		486,592	449,919	488,923	529,574	572,223
Gross Profit		3,194,429	3,053,348	3,323,907	3,598,616	3,886,816
Expenditure:		€	€	€	€	€
Wages & salaries	Table A2.4	1,260,465	1,298,279	1,337,227	1,377,344	1,418,664
Training & uniforms		15,000	15,450	15,914	16,391	16,883
Travel		15,000	15,450	15,914	16,391	16,883
Light/heat/power		100,000	103,000	106,090	109,273	112,551
Water & waste		20,000	20,600	21,218	21,855	22,510
Insurance		60,000	61,800	63,654	65,564	67,531
Telephone/postage		15,000	15,450	15,914	16,391	16,883
Stationery/office supplies		15,000	15,450	15,914	16,391	16,883
Marketing		250,000	250,000	257,500	265,225	273,182
Events (excl. sponsorship)		14,092	24,191	32,392	33,363	34,364
Bank charges & overdraft int.		9,203	8,758	9,532	10,320	11,148
Professional fees		50,000	51,500	53,045	54,636	56,275
Repairs and maintenance (5% of Income)		184,051	175,163	190,641	206,409	222,952
Rates (estimate)		250,000	250,000	250,000	250,000	250,000
Licences, memberships, sundries		25,000	25,750	26,523	27,318	28,138
Security (outsourced)		150,000	154,500	159,135	163,909	168,826
Cleaning (outsourced)		160,000	164,800	169,744	174,836	180,081
Total Expenditure		2,592,810	2,650,141	2,740,355	2,825,617	2,913,753
EBITDA		601,618	403,207	583,552	772,999	973,063
Depreciation	Table A2.5	1,275,000	1,275,000	1,275,000	1,275,000	1,275,000
Surplus net of Depreciation		673,382	871,793	691,448	502,001	301,937

Table A2.2: NDC Revenue Projections - Ticket Sales

		Year 1	Year 2	Year 3	Year 4	Year 5
Note 1: Admissions						
Adults						
No. of adult visitors		120,000	110,000	116,000	122,000	128,000
Average entrance fee	€	12.50	12.88	13.26	13.66	14.07
Total adult admissions revenue	€	1,500,000	1,416,250	1,538,305	1,666,409	1,800,814
Children						
No. of child visitors		18,000	16,500	17,400	18,300	19,200
Average entrance fee	€	7.00	7.21	7.43	7.65	7.88
Total children admissions revenue	€	126,000	118,965	129,218	139,978	151,268
Concessions (Seniors, Students)						
No. of concession visitors		54,000	49,500	52,200	54,900	57,600
Average entrance fee	€	9.00	9.27	9.55	9.83	10.13
Total concession admissions revenue	€	486,000	458,865	498,411	539,916	583,464
School Groups						
No. of group visitors		12,000	11,000	11,600	12,200	12,800
Average entrance fee (per capita)	€	5.00	5.15	5.30	5.46	5.63
Total adult group admissions revenue	€	60,000	56,650	61,532	66,656	72,033
Adult Groups						
No. of group visitors		51,000	46,750	49,300	51,850	54,400
Average entrance fee (per capita)	€	8.00	8.24	8.49	8.74	9.00
Total adult group admissions revenue	€	408,000	385,220	418,419	453,263	489,821
Family Parties						
No. of family tickets		11,250	10,313	10,875	11,438	12,000
Average entrance fee	€	32.00	32.96	33.95	34.97	36.02
No. of persons covered (@ av. 4 per ticket)		45,000	41,250	43,500	45,750	48,000
Total revenue from families	€	360,000	339,900	369,193	399,938	432,195
Membership						
No. of Members						
Price per pass	€	20.00	20.60	21.22	21.85	22.51
Total Annual Pass Revenue	€	0	0	0	0	0
Total Admissions Revenue	€	2,940,000	2,775,850	3,015,078	3,266,161	3,529,596
Total Island Admissions Revenue net of VAT	€	2,697,248	2,546,651	2,766,126	2,996,478	3,238,161
Cost of Sales 3%	€	80,917	76,400	82,984	89,894	97,145

Table A2.2a: Admissions Breakdown						
	%	Year 1	Year 2	Year 3	Year 4	Year 5
Adults	40.00%	120,000	110,000	116,000	122,000	128,000
Concession	18.00%	54,000	49,500	52,200	54,900	57,600
Children	6.00%	18,000	16,500	17,400	18,300	19,200
School Groups	4.00%	12,000	11,000	11,600	12,200	12,800
Adult Groups	17.00%	51,000	46,750	49,300	51,850	54,400
Families	15.00%	45,000	41,250	43,500	45,750	48,000
Total	100.00%	300,000	275,000	290,000	305,000	320,000
Average entrance fee						
		Year 1		Year 3		
Adults	12.50	5.00		5.30		
Concession	9.00	1.62		1.72		
Children	7.00	0.42		0.45		
School Groups	5.00	0.20		0.21		
Adult Groups	8.00	1.36		1.44		
Families (pc)	8.00	1.20		1.27		
	Total	9.80		10.40		
	Total net of VAT	8.99		9.54		
	GOP 97%	8.72		9.35		
						8.72
Market Segments						
	Size	Penetrate	Demand			
Catchment up to 30 mins	527,612	4.00%	21,104			
Catchment 30-90 mins	1,276,724	3.00%	38,302			
Schools 0-90 mins	321,000	4.00%	12,840			
Tour Coach incl. day tours	760,000	6.00%	45,600			
Overseas tourists Dublin	3,805,000	3.50%	133,175			
Domestic & NI tourists Dublin	1,994,000	3.00%	59,820			
Cruise Ships visiting Dublin	130,000	5.00%	6,500			

Table A2.3: NDC Revenue Projections - Other Revenue						
		Year 1	Year 2	Year 3	Year 4	Year 5
Visitor Numbers		300,000	275,000	290,000	305,000	320,000
Note 2 - Shop Sales						
Total visitors		300,000	275,000	290,000	305,000	320,000
Est. avg. spend per visitor	€	3.00	3.09	3.18	3.28	3.38
Total shop sales	€	900,000	849,750	922,983	999,845	1,080,488
Total shop sales, net of VAT	€	731,707	690,854	750,393	812,882	878,446
Cost of sales 50%	€	365,854	345,427	375,196	406,441	439,223
GOP @ 50%	€	365,854	345,427	375,196	406,441	439,223
Note 3 - Guide Book Revenue						
Total visitors		300,000	275,000	290,000	305,000	320,000
% purchasing guide books		5%	5%	5%	5%	5%
Est. avg. price	€	3.50	3.61	3.71	3.82	3.94
Total guide book sales	€	52,500	49,569	53,841	58,324	63,028
Cost of sales 40% Y1, 20% Y2+	€	21,000	9,914	10,768	11,665	12,606
GOP @ 60% Y1, 80% Y2+	€	31,500	39,655	43,073	46,659	50,423
Note 4 - Genealogy Services						
Est. no. of visitors		300,000	275,000	290,000	305,000	320,000
Est. % using services		5%	5%	5%	5%	5%
Est. no. using services		15,000	13,750	14,500	15,250	16,000
Est. average p.c. spend per user	€	10.00	10.30	10.61	10.93	11.26
Total other revenue	€	150,000	141,625	153,831	166,641	180,081
Total other revenue, net of VAT	€	121,951	115,142	125,065	135,480	146,408
Cost of sales 15%	€	18,293	17,271	18,760	20,322	21,961
GOP @85%	€	103,659	97,871	106,306	115,158	124,447
Note 5: Café Concession						
Total no. of visitors		300,000	275,000	290,000	305,000	320,000
Average spend per head (net of VAT)	€	2.00	2.06	2.12	2.19	2.25
Total revenue	€	600,000	566,500	615,322	666,563	720,326
Concession fee		10.0%	12.5%	12.5%	12.5%	12.5%
Total concession revenue	€	60,000	70,813	76,915	83,320	90,041
Note 6: Evening Events						
No. of events		12	20	26	26	26
Average admissions per event		80	80	80	80	80
Total admissions		960	1,600	2,080	2,080	2,080
Average admission charge	€	20.00	20.60	21.22	21.85	22.51
Total revenue	€	19,200	32,960	44,133	45,457	46,821
Total revenue net of VAT	€	17,615	30,239	40,489	41,704	42,955
Cost of sales 3%	€	528	907	1,215	1,251	1,289

Table A2.4: NDC Preliminary Projections - Payroll

	No. of employees	No. of weeks p.a.	Equivalent annual rate	PRSI Rate	PRSI Total	Year 1 €	Year 2 €	Year 3 €	Year 4 €	Year 5 €
Chief Executive	1	52	70,000	10.75%	7,525	77,525	79,851	82,246	84,714	87,255
Asst. CEO/Operations Manager	1	52	50,000	10.75%	5,375	55,375	57,036	58,747	60,510	62,325
Exhibitions Manager/ Curator	1	52	40,000	10.75%	4,300	44,300	45,629	46,998	48,408	49,860
Events & Programming Head	1	52	40,000	10.75%	4,300	44,300	45,629	46,998	48,408	49,860
Education & Outreach Officer	1	52	25,000	10.75%	2,688	27,688	28,518	29,374	30,255	31,163
Genealogy Head	1	52	28,000	10.75%	3,010	31,010	31,940	32,899	33,885	34,902
Genealogy Assistant	1	52	25,000	10.75%	2,688	27,688	28,518	29,374	30,255	31,163
Genealogy Team - seasonal	2	26	35,000	10.75%	3,763	38,763	39,925	41,123	42,357	43,628
Visitor Experience Head	1	52	25,000	10.75%	2,688	27,688	28,518	29,374	30,255	31,163
Visitor Experience Team - full time	5	52	25,000	10.75%	13,438	138,438	142,591	146,868	151,274	155,813
Visitor Experience Team - seasonal	2	26	40,000	10.75%	4,300	44,300	45,629	46,998	48,408	49,860
Visitor Reception Head	1	52	20,000	10.75%	2,150	22,150	22,815	23,499	24,204	24,930
Admissions & Ticketing - full time	5	52	20,000	10.75%	10,750	110,750	114,073	117,495	121,020	124,650
Admissions & Ticketing - seasonal	3	26	20,000	10.75%	3,225	33,225	34,222	35,248	36,306	37,395
Marketing Manager	1	52	40,000	10.75%	4,300	44,300	45,629	46,998	48,408	49,860
Marketing/Sales Assistant	1	52	25,000	10.75%	2,688	27,688	28,518	29,374	30,255	31,163
Retail manager	1	52	40,000	10.75%	4,300	44,300	45,629	46,998	48,408	49,860
Shop staff - full time	3	52	20,000	10.75%	6,450	66,450	68,444	70,497	72,612	74,790
Shop staff - seasonal	2	26	20,000	10.75%	2,150	22,150	22,815	23,499	24,204	24,930
Finance & Admin Manager	1	52	50,000	10.75%	5,375	55,375	57,036	58,747	60,510	62,325
Accounts Assistant / Credit Controller	1	52	25,000	10.75%	2,688	27,688	28,518	29,374	30,255	31,163
Administration Support Staff	2	52	22,000	10.75%	4,730	48,730	50,192	51,698	53,249	54,846
Secretary / PA to CEO + Asst. CEO	1	52	20,000	10.75%	2,150	22,150	22,815	23,499	24,204	24,930
Facilities Manager	1	52	40,000	10.75%	4,300	44,300	45,629	46,998	48,408	49,860
IT Specialist	1	52	35,000	10.75%	3,763	38,763	39,925	41,123	42,357	43,628
Maintenance	2	52	25,000	10.75%	5,375	55,375	57,036	58,747	60,510	62,325
Extra Cover Pool						40,000	41,200	42,436	43,709	45,020

Table A2.5: NDC Preliminary Projections - Depreciation/Renewal Reserve

	area (sqm)	€/sqm	Total €	Estimated % of Total	Renewal Rate	Year 1 €	Year 2 €	Year 3 €	Year 4 €	Year 5 €
Development cost			12,750,000							
Pre-opening costs										
- Buildings and related costs	6,000			0.0%	2.50%	0				
- Building fit-out	2,500			0.0%	8.50%	0				
- Exhibition fit-out	3,000	4,000	12,000,000	94.1%	10.00%	1,200,000				
- Pre-opening costs			750,000	5.9%	10.00%	75,000				
Depreciation/Renewal Reserve Charge for year						1,275,000	1,275,000	1,275,000	1,275,000	1,275,000
Accumulated charge at start of year						0	1,275,000	1,275,000	2,550,000	3,825,000
Accumulated charge at end of year						1,275,000	1,275,000	2,550,000	3,825,000	5,100,000
Capital expenditure to date						12,750,000	12,750,000	12,750,000	12,750,000	12,750,000