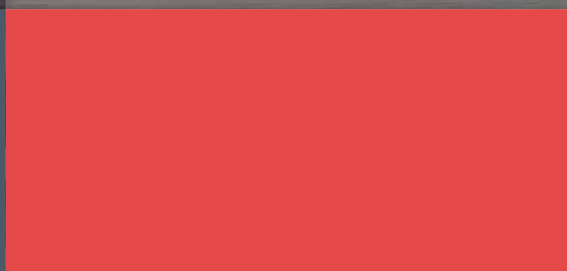# DESTINATION DUBLIN

A Collective Strategy for Tourism Growth to 2020

Foreword

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

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

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

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

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

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

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

Lucy McCaffrey, *GDT Chairperson*

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

LUCY MCCAFFREY – Chair, The Grow Dublin Taskforce

Executive Summary

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

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

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

The Taskforce conducted extensive research among visitors and potential visitors in key markets to determine their interests and motivations, and to identify the ways in which the Dublin offering addresses them. Based on that research the Taskforce set about developing a strategy to return Dublin to growth, underpinned by a new, compelling, and authentic Dublin proposition. This strategy and the new proposition will provide the basis for mobilising all stakeholders – public bodies, private enterprise and citizens – in developing and delivering a memorable visitor experience.
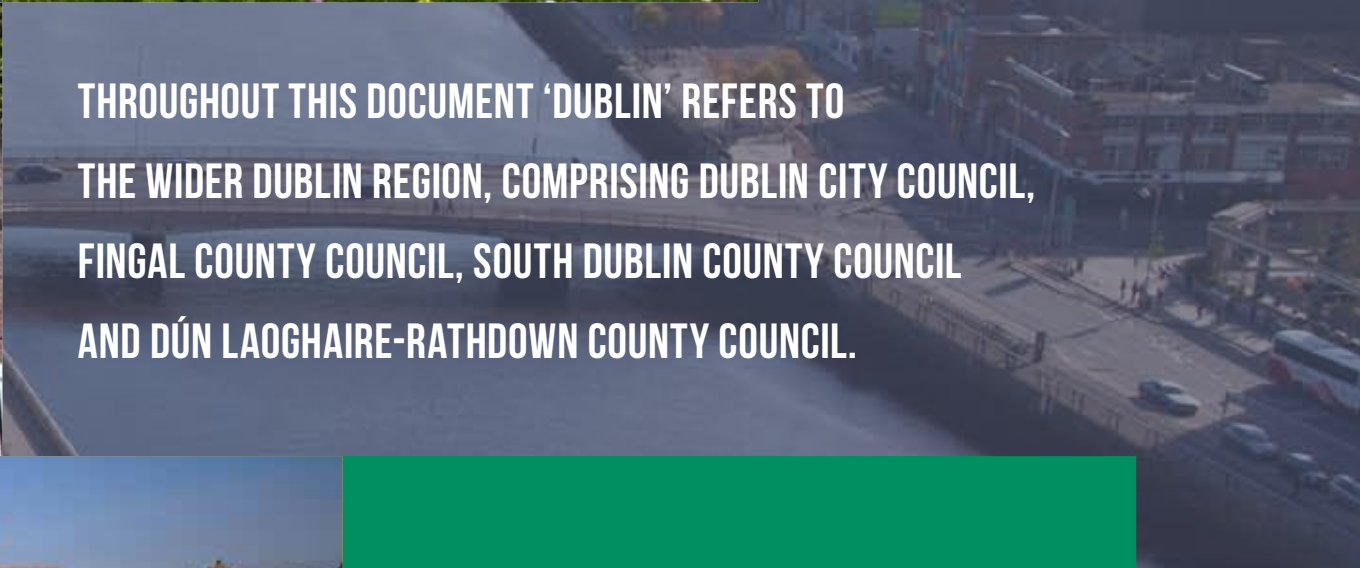
Throughout this document 'Dublin' refers to the wider Dublin region, comprising Dublin City Council, Fingal County Council, South Dublin County Council and Dún Laoghaire-Rathdown County Council.

The Challenge for Dublin

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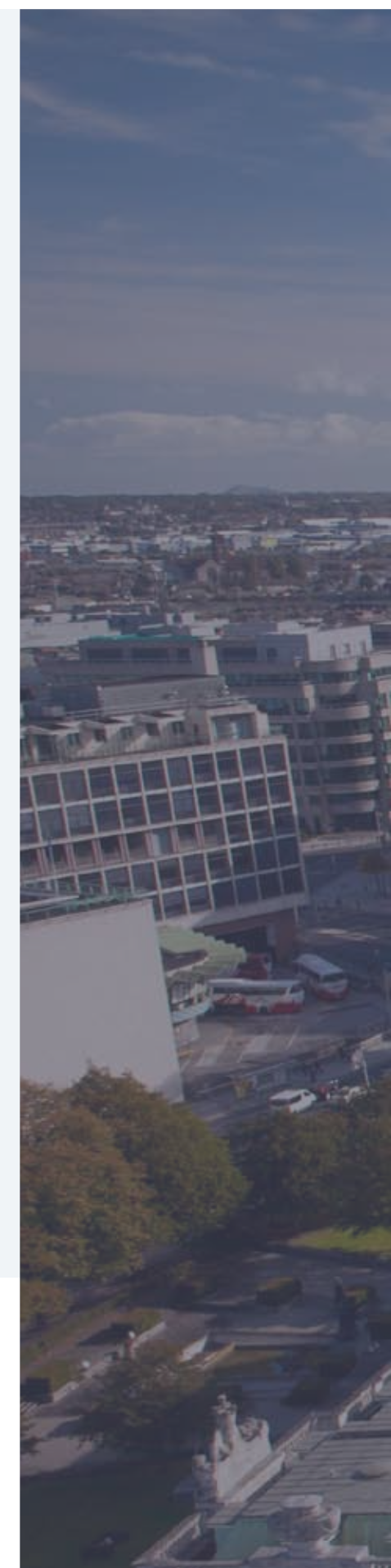
THROUGHOUT THIS DOCUMENT 'DUBLIN' REFERS TO
THE WIDER DUBLIN REGION, COMPRISING DUBLIN CITY COUNCIL,
FINGAL COUNTY COUNCIL, SOUTH DUBLIN COUNTY COUNCIL
AND DÚN LAOGHAIRE-RATHDOWN COUNTY COUNCIL.

The Opportunity

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

A Visitor-Focused Strategy

- The Grow Dublin Taskforce identified five sectors that offer potential for significant growth and the best return on investment: **'Social Energisers'** – young couples and adult groups looking for excitement, new experiences, and fun, social getaways to novel destinations.
- **'Culturally Curious'** – mostly older couples or solo travellers with time (and money) to spend.
- **Conference and incentive visitors**, whose expenditure is amongst the highest of all visitors and who are more prone to visit in times when cash flow for Dublin businesses is critical – in the shoulder and off-seasons.

- **Cruise visitors**, who come to Dublin as part of a European cruise.
- **Event visitors,** coming to Dublin specifically to attend an event or festival, whether sporting, cultural, business or any other type of event.

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

A New Dublin Proposition

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

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

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

A New Way of Working to Achieve Growth

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

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

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

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

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

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

1

Scenario
Status Quo = 'Business as Usual'.

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

2

Scenario
Improved Collaboration = 'Return to Growth'.

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

3

Scenario
Game-Changer = 'Peak Performance'.

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

---

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

The Opportunity

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

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

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

TABLE 1

Action Plan

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

Sector-specific programmes

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

- **'Dublin Now Plus'**: Expansion of the *'Dublin Now'* Pilot Action Plan into mainland Europe and US. This Action Plan has been centred on three work streams developed to overcome barriers to growth: industry engagement and collaboration; digital content and strategy; and in-market activation.

- **Bringing Dublin to life:** Dublin's diversity will be collated into a coherent and accessible experience-development framework under key themes across Dublin city and region (urban and extra-urban). This will drive both the evolution of segment-focused experience developments and Dublin's marketing communications. Core values of the new Dublin brand proposition will be integrated throughout to convey a sense of variety, vibrancy and surprise. The framework will also provide Dubliners with new ways to engage with their city and region and enable them to mediate and interpret it more effectively to visitors.

- **Dublin – a world-class business tourism destination:** 70% of business visitors to Ireland travel to Dublin. In 2011, international conferences accounted for almost 96,000 overseas visitors to Ireland and a revenue yield of approximately €135 million to the Irish economy, the bulk of which is spent in Dublin. Dublin, however, is far from fulfilling its potential. The city is well furnished with venues, accommodation, facilities, services and attractions. We aim to position Dublin in the world's top tier of conference and incentive destinations, by targeting conference organisers and potential delegates as well as incentive planners.

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

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

Cross-sector enabling projects

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

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

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

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

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

The Opportunity

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

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

Critical Success Factors

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

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

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

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

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

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

Resourcing on a Collaborative Basis

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

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

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

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

Measuring Progress

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

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

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

The Opportunity

Next Steps

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

Key Enabling Projects

- Establish the **Grow Dublin Tourism Alliance** to drive the strategy forward, with representatives from all committed stakeholders.

- Develop a brief for, and commission work on, the new **Dublin brand identity.**

- Identify key stakeholder partners, who will work together and commit resources towards a shared goal within the context of the **new private-public funding model**.

- Develop a high-impact **marketing communications and media plan** to promote the new Dublin proposition in overseas markets.

- Develop a **citizen engagement plan**. Produce a factsheet illustrating the new proposition, with key tourism facts (e.g. jobs, revenue etc.), and distribute it through key channels.

- Develop the first iteration of the framework to **Bring Dublin to Life**, including key themes, with inputs from Social Energiser and Culturally Curious experience-development teams.

- Develop the specifications for the **digital platform**. Identify a development partner.

- Develop the **visitdublin.com** site to create an expanded calendar of events, as well as building on existing information over the wider Dublin City and Region.

Actions to Attract More Visitors for Major Events

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

Actions to Attract More Leisure Visitors

- Start to extend 'Dublin Now' initiative for Social Energisers into other geographical markets ('**Dublin Now Plus**').

- Identify and develop **partners with complementary interests in promoting Dublin to Social Energisers and the Culturally Curious** – such as leading edge digital companies. Outline plan of activities for the year ahead.

Actions to Attract More Business Visitors

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

Actions to Attract More Cruise Visitors

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

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

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

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

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

SHAUN QUINN - Chief Executive, Fáilte Ireland