



**Tourism ABC:  
Promoting Dublin as a location for Arts,  
Business and Culture**

# Table of Contents

<b>EXECUTIVE SUMMARY .....</b>	<b>III</b>
<b>1. INTRODUCTION .....</b>	<b>1</b>
<b>2. BUSINESS TOURISM .....</b>	<b>2</b>
2.1 THE IMPORTANCE OF BUSINESS TOURISM TO THE DUBLIN ECONOMY .....	2
2.2 AIR ACCESS.....	4
2.3 BUSINESS PRODUCT INFRASTRUCTURE DEFICIT.....	5
2.4 VAT REFUNDS FOR BUSINESS TRAVELLERS.....	6
2.5 RECOMMENDATIONS.....	7
<b>3. CULTURAL TOURISM.....</b>	<b>8</b>
3.1 SIGHTSEERS AND CULTURALISTS - A GROWING SEGMENT .....	8
3.2 OPTIMIZING THE EXISTING PRODUCT.....	9
3.3 EXPANDING THE PRODUCT RANGE.....	10
3.4 INNOVATIVE PROGRAMME PLANNING.....	11
3.5 RECOMMENDATIONS .....	12
<b>4. TOURISM ENVIRONMENT.....</b>	<b>14</b>
4.1 THE CITY AS A BACKDROP TO TOURISM.....	14
4.2 VISUAL IMPACT.....	14
4.3 TRANSPORT AND ACCESS.....	16
4.4 RECOMMENDATIONS.....	18
<b>5. OVERVIEW.....</b>	<b>20</b>
<b>APPENDIX.....</b>	<b>21</b>

## **Executive Summary**

The tourism sector is a vital component of the Dublin economy, and contributes in a unique and dynamic way to the city's cultural mix and vibrancy. As Ireland becomes increasingly expensive, it is imperative that steps are taken in the areas of 'business tourism' and 'cultural tourism' to ensure that the tourism "product" is regenerated to attract higher value-added customers to the city. Dublin should aspire to become a leading destination for business and cultural tourists by the end of the decade.

The business tourism market is a key market segment for the Dublin region. Government must act in a more comprehensive and concerted way to help grow this market. Ireland's performance in attracting high margin business tourists has been stagnant at best since the beginning of the decade. Modest growth targets have been set for 2007 and even these targets will require concerted action to achieve them. Dublin is ranked in 20<sup>th</sup> place as the best location for business tourists, behind such cities as Vienna, Barcelona and Berlin.

The urgent development of the National Conference Centre and certainty over its opening date is an initial step in a series of actions required to sustain the profitable business tourism sector. Government should proactively enhance and develop existing public venues to cater for large audience numbers (in excess of 300 persons). In the longer term, conversion of government buildings vacated through decentralisation would offer prestige venues for state and business functions. In addition, local interests must not hinder the prompt development of Pier D and the second terminal and runway at Dublin Airport.

There is a need for a single coherent voice in Dublin to represent, in an articulate way, the wide range of bodies that operate in the cultural tourism sector. A Cultural Ambassador would ensure that Dublin's heritage and attractions are presented in a structured fashion. This individual should operate within Dublin Tourism and provide a comprehensive listing of events and proactively market a series of thematic programmes. The Department of Arts, Sport and Tourism should put cultural institutions on a multi-annual funding envelope to maximise marketing opportunities.

The new regional structure for tourism being developed by Fáilte Ireland suggests that Dublin Tourism will have the lead role for promoting all tourist activities in

the city. We believe that this is appropriate and that Dublin Tourism should have a clear accountable mandate to be responsible for developing and increasing the tourism market in Dublin.

The recommendations of the Dublin Chamber are based on the Chamber's vision document, *Imagine Dublin 2020*. Building upon Dublin's unique history and culture, our vision is to ensure that Dublin shall be:

- An accessible city;
- A safe city;
- A clean and visually attractive city;
- A welcoming location for tourists, where standards of service are personable and professional; and
- An interesting and fun place to be.

<b>Actions</b>	<b>Responsibility</b>
Actions to improve customer services at Dublin Airport must be implemented on a continuous basis.	Dublin Airport Authority
Pier D must be operational by 2007 and Terminal Two completed by 2009.	Dublin Airport Authority, Department of Transport
A high calibre, comprehensive marketing plan must be put in place to sell Dublin as destination for conferences and meetings, especially in relation to the National Conference Centre.	Dublin Convention Bureau, Department of Arts, Sport and Tourism
Existing, and new, non-hotel venues must be identified and transformed to facilitate after-hours business events for groups more than 250 persons.	OPW, Department of Arts, Sport and Tourism
VAT on legitimate corporate expenditure by overseas business tourists (accommodation and restaurant expenses) should be refundable.	Department of Finance, Revenue Commissioners
The position of 'Cultural Ambassador' should be created. They would champion an identifiable cultural brand for Dublin city.	Dublin Tourism
A holistic marketing policy for the Arts must be put in place, with a comprehensive listing of cultural events in the city.	Dublin Tourism in association with Dublin City Council and other stakeholders.
Opening hours of cultural attractions must be extended	Department of Arts, Sport and Tourism
Licensing Laws should be reviewed in light of a lack of alternative locations for language students etc. to attend.	Department of Arts, Sport and Tourism, Department of Justice, Equality and Law Reform
Multi-annual funding for the Arts	Department of Arts, Sport and Tourism, Department of Finance
Improve the visual impact of the city: Remove litter, improve civic spaces & make good following repair work	Dublin City Council
Integrate Public Transport	Department of Transport through the Dublin Transport Authority
Improve signage around the city	Dublin City Council
Create safe parking and drop off locations around the city	Dublin City Council
Improve the standard of taxi service in the city	The Commission for Taxi Regulation

## **1. Introduction**

Tourism is one of Ireland's principal generators of economic activity. In 2005 overseas visitor numbers peaked at an all-time high of almost 7 million, resulting in earnings of €4.3 billion and employment of approximately 246,000 people in the tourism and hospitality industry<sup>1</sup>. Due to trends such as shorter city breaks, cheaper airline travel and shorter booking times, coupled with the airport and port remaining the main gateways to the island of Ireland, Dublin has continued to increase its visitor numbers with average annual growth of 8% since 1999. Last year alone, Dublin city received a total of 3.9 million overseas visitors. These tourists injected almost €1.3 billion into the economy, and spent approximately 18 million nights in accommodation throughout the city.

The tourism sector is a vital component of the Dublin economy and contributes in a unique and dynamic way to the city's cultural mix and vibrancy. However, as Dublin becomes a more expensive location, there is a need to regenerate Dublin's tourism "product" to assure value for money, and to continue to attract higher value-added customers to the city. Dublin Chamber of Commerce has a vision to create by 2020, a city that is a world leader in terms of quality of life for all its citizens, whether living, working or visiting. The attractiveness of Dublin as a destination shall be founded upon the city's unique history and culture, and by ensuring that Dublin is:

- An accessible city;
- A safe city;
- A clean and visually attractive city;
- A welcoming location, where standards of service are personable and professional; and
- An interesting and fun place to be.

In order to realise this vision, the Dublin Chamber of Commerce believes action is required in three areas of tourism:

- Business Tourism;
- Cultural Tourism; and
- The overall Tourism Environment.

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<sup>1</sup> This includes hotels, guesthouses, self-catering facilities, restaurants, licensed premises, tourism services and attractions.

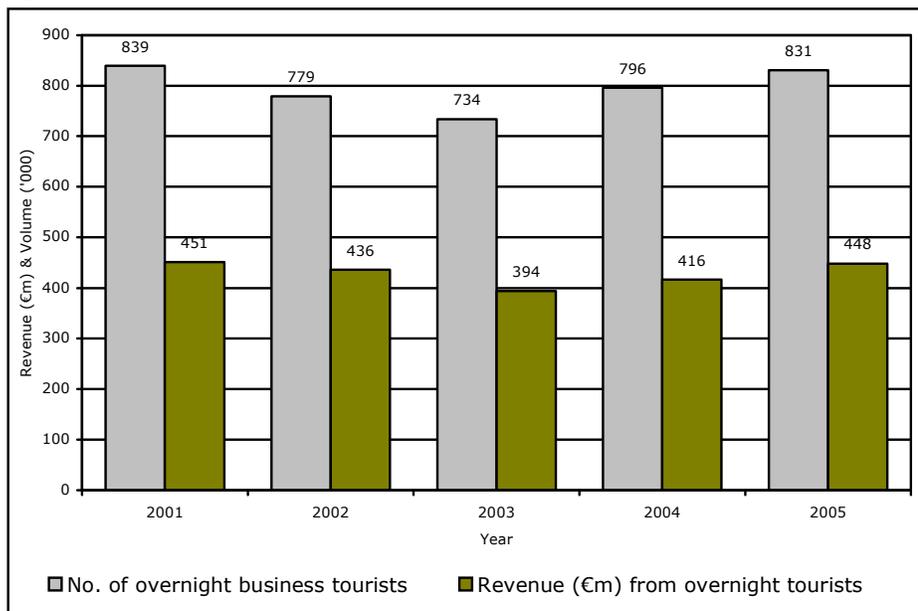
## 2. Business Tourism

### 2.1 The Importance of Business Tourism to the Dublin Economy

Fáilte Ireland has set a target for the value of overseas business tourism revenue of €470m by 2007. Revenue has stagnated in recent years, falling from a high of €460m in 2001 to €424m in 2004. Although expenditure rose to €457m in 2005, concerted action shall be required to realize 2007's target.

There is a need to actively deal with the issues currently discouraging meeting planners from selecting Dublin as a destination, to prevent a further decline in the share of business tourism that Dublin attracts. Actions must be taken to deal with the city's infrastructure deficits, including the current lack of a comprehensive timetable for the completion of the National Conference centre, the lack of availability of suitable accommodation facilities and entertainment venues for large groups, and also the lack of transport facilities city wide and suitable resources at the airport. Dublin has been 'punching above its weight' in the business tourism market, despite the lack of supporting facilities and policies. In 2005, the International Congress and Convention Association ranked Dublin 20<sup>th</sup> in terms of attractiveness for hosting meetings. Concerted action is required to raise the city's ranking to the top five by 2010.

**Fig 1: Overseas visits to Ireland by Business Tourists, 2001-05**



Source: Dublin Chamber of Commerce deviation from CSO data.

An important segment of Ireland’s business tourism market is the promotable business segment. In 2005 this segment accounted for just less than one-third of all business visitors, but nearly half of all expenditure. Dublin continues to attract the vast majority of Ireland’s business tourism market, due to its facilities, transport infrastructure and the number of Government and private sector HQ facilities located in the capital. Fáilte Ireland estimates that approximately 75% of the high value-added promotable business segment is attracted to Dublin. In 2005, this contributed approximately €165m to the Dublin economy.

**Table 1: Promotable Business Segment**

	<i>No. of overnight visitors</i>	<i>Revenue (€m)</i>
Total Business Tourism 2005	857,000	456.6
<b><i>Promotable Business:</i></b>		
International Conference	89,000	85.4
Corporate Meeting	147,000	111.8
Trade Fair / Exhibition	27,000	22.7
<b><i>Total Promotable Business</i></b>	<b>263,000</b>	<b>219.9</b>
<b><i>Promotable Section as % of Total Business Tourism</i></b>	<b>31%</b>	<b>48%</b>

Source: Fáilte Ireland

Note: Total figure differs from fig. 1 due to differencing in measurement methodology. Failte Ireland figure is taken from CSO’s data (831,000 visitors), plus the business tourists entering via Northern Ireland (26,000)

Dublin is not a world-class destination for business tourism. In order for Dublin to aggressively pursue the promotable business segment, Dublin Chamber has identified the following as key issues that must be addressed:

- 2.2 Airport facilities in Dublin;
- 2.3 The business product infrastructure deficit; and
- 2.4 VAT refunds on accommodation and restaurant costs for business travellers.

## **2.2 Air Access**

Air access is critical for Ireland and is the primary question of any international client when considering a destination - be it for leisure or business. While the advent of low cost carriers has improved access to Dublin, the low cost carrier service model employed by many airlines does not fully meet the requirements of the business tourism sector. This sector has a different subset of needs than those of leisure travellers<sup>2</sup>. Thus, we believe there is a commercial case to be made in relation to accommodating the needs of the business tourism market - particularly on routes into Dublin that capture the majority of direct and transfer passengers, such as London, Paris, Frankfurt and Amsterdam. The availability of a dedicated business executive to liaise with operators for business group purposes, and to develop a booking system to facilitate group reservations in the major airlines would be a useful starting point.

We believe it is essential that Dublin have a world-class international airport with sufficient capacity to accommodate rising demand. Between 1992 and 2004 there was a compound annual growth rate of 9.4% in passenger numbers through Dublin airport. By the year 2020 passenger numbers are expected to reach 33 million, which is effectively a doubling of the 17 million passengers that were received in 2004<sup>3</sup>.

Over the next ten years, the Dublin Airport Authority (DAA) plans to increase airport terminal and airside capacity to facilitate the 30 million passengers expected per annum. The current facilities are at breaking point and the DAA is doing its utmost to accommodate the volume of passengers.

With current growth of over a million extra passengers per annum, the developments proposed by the DAA, including the building of a second terminal and a second main runway, are vital to future growth. It is imperative that no delays occur and that the proposed dates of delivery are adhered to, with Pier D operational by 2007 and Terminal Two completed by 2009. In addition, the timely provision of enhanced road access and a conveniently located Metro North rail link to the city centre are critical.

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<sup>2</sup> These include: the need for a dedicated contact person to address specific requests, enquiries or reservations; the need for amendments in booking facilities as the policy of requiring specific names and immediate payment is not compatible with the preliminary stage of meeting planning.

<sup>3</sup> Dublin Airport Stakeholders Forum, 16<sup>th</sup> November 2005.

### **2.3 Business Product Infrastructure Deficit**

A destination that can offer a comprehensive package of hotel rooms, meeting venues and good transport facilities will be better positioned to attract business *vis-à-vis* competitor destinations. Dublin must deal immediately with its current infrastructure deficit and expand its offerings to ensure that potential conference planners and organisers have a comprehensive business tourism product to offer visitors. Dublin Chamber has identified two important gaps in Dublin's infrastructure, which if dealt with would improve the city's profile and attractiveness as a business tourism destination.

Firstly, there is a lack of non-hotel venues suitable to host a dinner reception for capacities in excess of 250 persons. A recent health & safety check on the Royal Hospital Kilmainham resulted in the maximum numbers being reduced to 270. This was a severe blow to the industry. The Dublin Chamber calls for creative discussion and co-operation between local and national Government, state agencies, third level institutions and the business community to identify possible venues for business tourism events by 2007. Existing venues and new sites need to be identified. Possible venues, which could immediately become available through such co-operation, include:

- The use of public parks for marquees; and
- A permanent marquee in the IFSC, like the Spiegeltent.

In the longer term, the conversion of government buildings vacated through decentralisation would offer prestige venues for state and business functions. The Custom House is one such example. This building completed in 1791 is considered to be, architecturally, one of the most important buildings in Dublin. During the civil war the interior of the building was destroyed. Since then huge state investment has been put into its refurbishment. This Georgian building is a magnificent structure and would be an ideal venue for large-scale functions.

Other sites that would provide suitable, high-status venues if developed include:

- The OPW sites at Military Road, Infirmary Road and Parkgate St.;
- Collins Barracks;
- The proposed Theatre site at Grand Canal Basin;
- A redeveloped Lansdowne Road stadium; and
- The extended National Concert Hall, including the UCD space to be vacated in Earlsfort Terrace.

The second gap in Dublin's infrastructure is the lack of clarity surrounding the proposed National Conference Centre. Presently, conference organisers cannot be certain as to the internal infrastructure of the centre, in terms of exhibition space and a seating plan, nor is there a specific guaranteed completion date. The current proposed opening date is Autumn 2009 but without a guarantee, there will be little in the way of international conferences held that year.

In order to ensure that tour operators can market Dublin as a destination, total confidence must be engendered within the international business tourism community that the National Conference Centre shall be delivered on time. The lack of visibility and clarity that surrounds this piece of infrastructure is hindering any substantial growth in Dublin's proportion of the business tourism market. Since the selection of a destination is often made to 3-4 years in advance, specific information regarding the opening date and internal layout of the centre must be issued immediately to allowing for a high calibre, comprehensive marketing plan to be put in place. In addition, sufficient resources must be allocated to the Dublin Convention Bureau to ensure this marketing plan becomes a reality.

#### **2.4 VAT Refunds for Business Travelers**

Ireland has the sixth highest rate of VAT on accommodation in the EU25, and high levels of excise duty on wine, beer and cider. This high level of indirect taxation is pricing Dublin, and Ireland, out of some tourism markets and having a direct negative impact on competitiveness.

Many competitor countries within the EU are allowing a deduction in VAT on legitimate accommodation and restaurant expenses as a business expense. Thus, whilst Denmark, Germany and Hungary have higher nominal VAT rates than Ireland's 13.5%, they allow for a complete recovery of input VAT incurred by business travellers and therefore offer a lower effective rate of taxation.

As Dublin is the primary venue in Ireland for business travellers, this disparity significantly inhibits Dublin's ability to compete internationally for business events. We believe the lack of a similar policy in Dublin results in the loss of potential business. Thus, we believe that the VAT on legitimate corporate

expenditure in hotels and restaurants for conferences, incentive travel and corporate meetings should be refundable.

## **2.5 Recommendations**

### **Air Access**

- Dublin Airport Authority must implement actions to improve customer services at Dublin Airport on a continuous basis.
- Government must take whatever steps are necessary to ensure that the DAA has sufficient funding resources to provide for the projected increases in passenger numbers and ensure that Pier D is operational by 2007 and Terminal Two completed by 2009.

### **Business Product Infrastructure Deficit**

- Adequate funding should be allocated to Dublin Convention Bureau to enable it to effectively market Dublin as destination for conferences and meetings, especially in relation to the National Conference Centre.
- The OPW should proactively identify, and open, new venues that can facilitate the needs of the business tourism sector, with particular reference to buildings that shall become available after decentralisation.
- The Health and Safety Authority should work with industry and Dublin Local Authorities to develop an independent health & safety audit for all non-hotel venues. If capacity of a venue is to be reduced over health and safety concerns then the Health and Safety Authority should work proactively with the venue management and the OPW to address the concerns raised with a view to retaining the existing capacity.
- Fáilte Ireland should identify the current gaps in Dublin's infrastructure deficit and highlight these gaps as private and public sector opportunities. There is a need to identify opportunities in the tourism sector, much in the same fashion as the IDA have done in other sectors.

### **VAT Refunds for Business Travellers**

- Government should allow overseas business visitors to recoup VAT on legitimate business expenditure on accommodation and restaurant expenses.

### **3. Cultural Tourism**

#### **3.1 Sightseers and Culturalists - A Growing Segment**

Research carried out by Tourism Ireland indicates that the best prospect for tourism growth in Dublin is the 'sightseers and culturalists' sub-sector. Representing a core segment of over 2 million holidaymakers into Ireland in 2004, with approximately 1 million staying overnight in Dublin, visitor needs for this sub-sector include sightseeing, culture, festivals, historic Irish culture and shopping (antiques, Irish goods).

The important economic impact of this segment has been highlighted in other cities in Europe. The tourist sector in Bilbao has benefited greatly from the opening of the Guggenheim Museum. Since its inauguration in 1997, the Guggenheim in Bilbao has received more than 8.13 million visitors, and in 2005 it generated economic activity in the Basque region worth €186.2 million. Overall the Guggenheim's direct and induced impact on the generation of wealth in the area has been 18 times more than the initial public investment into its creation.

The Tate Gallery of Modern Art, which opened in Southwark, London in 2000, is another example of the importance of cultural attractions. In its first year, the Tate Modern's collected revenue had far exceeded expectations. It had generated around £100million, of which £50 to £70 million went to the local area, and had become the third most visited tourist attraction in Britain. Furthermore, the museum helped regenerate the South bank and Bankside area of London by drawing attention, and people, to a previously undiscovered and undeveloped area.

The aim of Dublin Chamber of Commerce is to ensure that this segment of visitors is attracted to the city by ensuring that a full and varied programme can be organized during ones stay, and in terms of infrastructure, that Dublin city has good signage, transport facilities and well-developed sporting facilities<sup>4</sup> etc. We wish for the sightseers and culturalists to leave with positive memories of a thriving cultural city with a unique atmosphere, thereby advertising the city as an excellent destination to colleagues, friends and relatives. Indeed a positive perception of the destination is critical as Fáilte Ireland estimate that a

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<sup>4</sup> Dublin Chamber of Commerce supports the redevelopment of Lansdowne Road.

dissatisfied customer tells two to three times as many people about their bad experience than a satisfied customer.

Four key issues must be addressed to capitalise on this growing segment of the market. These include:

- 3.2 Optimising the existing product;
- 3.3 Expanding the product range;
- 3.4 Innovative programme planning; and
- 3.5 High levels of accommodation standards.

### **3.2 Optimizing the Existing Product**

#### **3.2.i Marketing Policy for the Arts**

Due to short lead-times and a lack of marketing expertise in the Arts field, there is no cogent, holistic marketing policy for the arts in Dublin. In addition, it is difficult to access information on Dublin's cultural programme. This is evident at Dublin airport and other access points to the city, where potential exists for dedicated information to be supplied to visitors regarding facilities/ events/ activities in Dublin.

The Chamber believes that there is a need to fund a large advertising campaign that focuses upon the many existing cultural attractions in the city. There is an untapped opportunity in the city for cultural attractions to be given a theme and "packaged". This campaign requires the appointment of a Cultural Ambassador who would champion an identifiable cultural brand. We believe that this culture champion should be based in Dublin Tourism.

#### **3.2.ii Opening Hours of Cultural Centre**

Many of the cultural centres in Dublin are closed on Mondays and in the evenings and are limited to a few short opening hours on a Sunday. Cost factors and staff relations are cited as difficulties in changing these arrangements, as there is no incentive to remain open due to free admission. However, as Dublin is now the third most popular destination for short city breaks in Europe, the limited opening of cultural centres is an outdated tradition that no longer caters to the need of modern tourism, especially as these city breaks often span over long week-ends.

### **3.3 Expanding the Product range**

#### **3.3.i Licensing Laws**

The new licensing laws are a barrier to the promotion of Dublin as a family friendly destination<sup>5</sup>. Under these rules, venues holding pantomimes cannot allow children into the bar at the interval and families with teenagers must be turned away from Irish Music performances when alcohol is served. Many bars now serve competitively priced food, yet tourist families cannot avail of these prices as they are prevented from eating in such establishments after 9pm if any of the party are under the age of 18 years.

This issue has particularly impacted on the language student sector. Language schools account for 200,000 visitors to Ireland every year and contribute €300million to the economy. These language schools need to offer safe entertainment to students on a tight budget. However as in many cases these students are under age, they cannot be taken to free 'Irish' entertainment in Dublin locations, and the cost of theatre tickets are invariably prohibitive. Thus there is a need to provide Irish music evening and/or Irish themed activities to this sub-section of visitors in venues that are not subject to licensing laws.

#### **3.3.ii Multi-Annual funding**

Contrary to the norm across all Government Departments, funding for the arts through the Arts Council is no longer approved on a multi-annual basis. This means that organisations such as theatre groups must wait until their annual grant has been confirmed before planning their programme for the year. The tourism industry and tour operators need to have programmes in place up to 18 months in advance in order to sell trips. As this is not the case, Dublin's theatres and music venues are missing out on the important tourist market and are forced to rely solely on local custom.

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<sup>5</sup> Persons under the age of 18 years are only permitted in licensed premises if accompanied by a parent or guardian, and it is between the hours of 10:30am-9pm in wintertime and 10:30am-10pm during the period 1<sup>st</sup> May to 30<sup>th</sup> September. Persons aged between 15-17 years may remain on the premises after 9 p.m. if attending a private function at which a substantial meal is being served.

### **3.3.ii Programming 'Gaps'**

There is a need for greater coherency and balance in the annual programming of cultural events in the city. Whilst much planning surrounds events like the St Patrick's Festival, the Theatre Festival and the Fringe Festival, there remain gaps and inaction between these events. This causes an imbalance in programming in Dublin. Almost all theatre companies are programming for the festival time frame, and become less active at other times. Most theatre companies in Dublin avoid the summer period, as their target is the domestic market. The scarcity of daytime programmes such as matinee performances makes for a gap in activity as well as a missed business opportunity.

The lack of a major festival in Dublin during the summer months, when attention is focused on Galway, Tralee and Kilkenny for other major festivals, is a loss to the city. Extra funding would allow providers to plan in advance, develop more programmes and perform across seasons.

### **3.4 Innovative Programme Planning**

Consumers are increasingly using the Internet to research their holiday destination and pre-book events. There is an urgent need for an Internet based one-stop-shop to allow people to plan their itinerary in advance, from journey times on all transport facilities to commencement times of entertainment shows, and reserve tickets for these before arriving in Dublin. A major grant programme is being put in place in Northern Ireland at the moment to network all venues and tourist offices. This enables visitors to buy a ticket in any tourist office for a play or concert. A similar initiative is required in Dublin.

Dublin Tourism has invested heavily in the technical side of the development of the 'Dublin Pass' using a 'smart card' chip. This allows full tracking of each card and all its uses. Partners in the pass have the ability to have hourly and daily printouts of when and where cards are used through 'reader' machines. To date, over 60,000 visits have been made to visitor attractions using the Dublin Pass. Taking part in this programme offers marketers the opportunity to gather a range of demographic and visitor habit information on their customers, which may be useful in future programming. In addition, the pass is an efficient way of informing tourists of all the options available in Dublin.

### **3.5 RECOMMENDATIONS**

#### **Optimising the Existing Product**

- The current key performance measure for Dublin Tourism is the number of bed-nights sold. The performance of Dublin Tourism should be measured by Fáilte Ireland on broader indicators including factors such as the number of referrals to cultural events and itineraries prepared for cultural events.
- Fáilte Ireland should target marketing campaigns at either a country or thematic level to highlight specific cultural events and provide accompanying itineraries.
- Culture Ireland should identify strategic locations worldwide to promote Irish culture.
- Dublin Tourism should work with the Theatre Forum, in association with Dublin City Council, Dublin Airport Authority and Dublin Port, to promote the theatre and other attractions in all public spaces in Dublin
- The Film Dublin partnership, with the co-operation of Dublin Tourism and Fáilte Ireland, should work to maximise the exposure of Dublin on global film and television.
- The Department of Arts, Sport and Tourism should examine opening hours of cultural centres in Dublin, with a view to changing the times to more user-friendly hours. During the high season, changes should include Monday opening, late opening mid-week, and earlier opening at the weekends. It is possible the same number of opening hours could be used in a better way.
- Dublin Tourism should appoint a 'Cultural Ambassador' for the city, who's remit would include the provision of a comprehensive listing of events and a proactive marketing of a series of thematic programmes in the city.

#### **Expanding the Product Range**

- Arts organisations should consider offering programmes during the summer months that have an Irish theme, are cost effective, and operate in a safe environment for students, in particular those under the age of 18 years.
- The Department of Arts, Sport and Tourism, together with Dublin City Council, should provide incentive funding for events in Dublin that

highlight the culture of Dublin, and have an intrinsic value to the city. The fund would provide a safety net for institutions/theatre companies to develop events that Dublin is capable of delivering.

- The Department of Finance should provide multi-annual funding for the arts. This would allow incentive funding to be made available to assist organisations to confirm their programmes further in advance, and allow events to be slotted into tour operators' programmes.

### **Innovative Programme Planning**

- Dublin Tourism should:
  - a) Develop an internet based one-stop-shop service for tourists;
  - b) Co-operate with existing established information providers, such as the Temple Bar Information Centre, to ensure that arts and cultural information is as up to date as possible; and
  - c) Pro-actively market cultural events to tourists that have used Dublin tourist web site's to book accommodation.
- Dublin Tourism and the Temple Bar Information Centre should work proactively with all arts organisations in Dublin to gather a comprehensive listing of cultural events in Dublin and make this available on the Dublin Tourism and the Temple Bar Information Centre web sites.
- Dublin Tourism should examine visitor behaviour through an analysis of use of the Dublin Pass smart card and share these results with tourist organisations. This would help to tailor future offers to visitors to Dublin.

## **4. Tourism Environment**

### **4.1 The City as a Backdrop to Tourism**

Dublin Chamber of Commerce believes that tourism not only acts as a vital contributor to employment and economic activity in the city, it also contributes in a unique and dynamic way to Dublin's cultural mix and vibrancy. As such, it is critical that a cohesive vision and strategic approach should underpin the tourism industry in the city. We believe that an environmental consciousness should be a cornerstone of that vision. The key priorities requiring immediate action are the visual impact of Dublin and transport in the city.

Co-operation will be required among many different players to address these issues. However, it shall be the engagement and active participation of Dublin City Council in delivering solutions that will be of critical importance.

### **4.2 Visual Impact**

In terms of visual impact, three areas need to be addressed urgently:

- 4.2.i Litter;
- 4.2.ii Optimising Civic Space; and
- 4.2.iii Making good following repair work.

#### **4.2.i Litter**

Regarding the cleanliness of the city, Dublin compares unfavourably with European cities of a similar size and also with large urban centres like London and Chicago, which are a multiple of Dublin's size. Litter, most particularly the pervasiveness of chewing gum and paper debris, is the most visible contributor to this problem. At a more general level, over-flowing bins, littered streets and unsightly vandalism contributes to a sense of a city lacking in civic pride.

Addressing individual propensity to litter is a long-term process that shall require education and changes in behaviour. However, more immediate solutions are required in the interim period. In particular, retailers must be made accountable for the litter environment outside their premises.

The cost to Dublin City Council of cleaning chewing gum off Grafton Street, Henry Street and O'Connell Street alone was €130,000 in 2005 (€250,000 city wide). The recent contribution by Wrigley's (who account for 90% of the Irish chewing gum market) of €2m towards education and research on the problem of gum litter is to be welcomed, as is the pilot information campaign being launched by the Gum Litter Taskforce. More immediately however, chewing gum needs to be removed from the pavements of the city more frequently.

#### **4.2.ii Optimising Civic Space**

If the green area of the Phoenix Park were removed from the equation, Dublin would be one of the least green cities in Europe. This does not bode well for tourism as greening and public space improvement can approve the quality of life for all and ensure that the city is a visually attractive location for those who cherish beautiful scenery. Indeed, a survey of visitors to Ireland in 2004 highlighted that 83% of all holidaymakers identified beautiful scenery as one of the most important destination issues, with 77% agreeing that an unspoilt environment was another. Thus it is imperative that a concerted effort is made to preserve open spaces and help create plans for new urban parks and incentives that revitalize the city. There is a need to regulate and minimise the profusion of visual clutter that has degraded many streets and spaces in the city. Pamplona in Spain, with a population of 190,000, is held up as an exemplar. The city has a welcoming urban environment, with almost four million square metres of parks and gardens. The city has managed to maintain its green areas whilst still becoming renowned as a congress city, where many scientific, technical, commercial, cultural and medical congresses take place.

There is a need for Dublin City Council to engage in a widespread, well-resourced and innovative programme of yearlong planting of flowers and shrubs, as this would greatly contribute to the overall appearance of the city. Civic spaces should be maintained to the best international standards and be used in innovative and creative ways for the purpose of public art exhibitions, concerts, cinema and themed markets to contribute further to the vibrancy of the city. The tidy towns competition has been successful throughout the country in engendering a sense of responsibility among individual retailers to maintain and beautify the external facades of buildings. The impact of the tidy towns shows

that standards can be ratcheted up on a building-by-building and street-by-street level. This demonstration effect is now required in our civic spaces.

#### **4.2.iii Making Good Following Repair Work**

Making good following maintenance and repair work is patchy. Often newly paved areas are 'made good' with temporary surfaces which remain in place for months. Uneven surfaces on pedestrian main thoroughfares undermine the overall quality of the city, and can severely impede access for the disabled.

### **4.3 Transport and Access**

There have been many positive developments in recent years in the area of transportation. Improved bus services now provide a safe, efficient and punctual service to the airport, which is a great benefit to tourists and locals alike. The Luas has contributed an attractive form of transport to the city and has made cultural centres, like the national museum in Collins Barracks and the Irish Museum of Modern Art in Kilmainham, more accessible for tourists. Most recently, Transport 21 has outlined ambitious plans, which will further improve accessibility and navigation for tourists in the city. For example, the proposed Metro link to Dublin Airport will substantially improve visitor accessibility to the city centre and follow-on connections throughout the country. Furthermore the extension of the Luas line to Citywest will enhance accessibility to the Citywest Convention Centre. However, weaknesses remain which need to be addressed in relation to:

- 4.3.i Integrated Public Transport;
- 4.3.ii Standards of Taxis;
- 4.3.iii Signage; and
- 4.3.iv Parking and drop off for motor coaches.

#### **4.3.i Integrated Public Transport**

In general, the main transport service providers furnish stand-alone information about the services they offer. There is no one source of integrated information, enabling a traveller to plan the most suitable means of completing a journey involving more than one mode of transport. This complicates route planning and consequently inhibits the use of public transport by tourists, which is an important part of the visitor experience. In addition, there has been only modest progress achieved to date in introducing integrated ticketing between the city's public transport providers. The option of purchasing a single ticket to give access to all forms of public transport over a varied number of days would deliver greater value for money for tourists, and facilitate access to a greater number of attractions.

#### **4.3.ii Standards of Taxis**

The de-regulation of the taxi industry has resulted in a much-needed increase in taxi provision on the streets of Dublin. However, the quality and reliability of the city's taxi service has suffered in the immediate aftermath of de-regulation. A high minimum standard of cleanliness, hygiene and service is urgently required to improve taxis in the city.

#### **4.3.iii Signage**

Visitors are being impeded from experiencing the full value of Dublin's historical and artistic heritage due to poor signage of important buildings and cultural venues. Better signage is needed for tourism sites throughout the city, both for pedestrians and vehicle drivers. In addition, the visitor signage currently in place is uncontrolled, inconsistent and unbranded. A consistent brand would be a reinforcing tool to market all aspects of the Dublin tourism product, such as national cultural institutions, Georgian Dublin, and themed tourist trails.

#### **4.3.iv Parking and drop off for motor coaches**

City centre hotels are severely restricted with regards to drop off, baggage and delivery, due to an absence of suitable short-term parking in adjacent lay-bys. This issue is causing considerable concern, as the present situation is not

providing visitors with an area where they can disembark safely from their transport.

#### **4.4 Recommendations**

##### **Visual Impact**

- Dublin City Council should remove chewing gum from the pavements of the city more frequently.
- Dublin City Council should focus upon the additional planting of flowers and shrubs, and explore innovative programming for civic spaces with cultural bodies in the city. If contractors fail to make good following repair work, a substantial penalty should be imposed.
- Businesses should fully explore the benefits that Business Improvement Districts could bring. BIDs aim to create higher standards in a higher cost competitive economy. A BID is a partnership arrangement between a Local Authority and its local business community to provide additional services and higher standards of environment and marketing. The focus is on creating cleaner streets, safer streets and greener streets.

##### **Transport and Access**

- Dublin Chamber of Commerce in response to Transport 21 has advocated that a powerful Dublin transport champion, with statutory powers sufficient to overcome blockages related to integrated services and ticketing, is urgently required. The Department of Transport should establish the Dublin Transport Authority as a matter of urgency.
- The Commission for Taxi Regulation should take actions to ensure a substantial upgrading of the taxi service in the city. Specifically, the Commission should:
  - a) Introduce a credit card payment option in all cabs;
  - b) Enforce the use of printed receipt system for all cabs;
  - c) Enforce a requirement to have visible notices informing customers of fare structures, entitlements and complaints procedures; and
  - d) Enforce minimum hygiene standards in all taxi's.

- As the world becomes more homogenous, branded taxi services contribute to a unique and distinct image for cities such as London and New York. There are currently no guidelines on colour or size of taxis in Dublin. As a first step we recommend the adoption of a single colour for all Dublin taxis with a view to the adoption of a single vehicle type. This must be tied in with the idea of a single brand for Dublin transport.
- Dublin City Council, in co-operation with industry should agree a new approach to tourism signage and increase the number of signs throughout the city.
- The provision of dedicated lay-bys for coaches to disembark passengers and off-load luggage in city centre hotels is urgently required. Innovative and flexible approaches towards the provision of dedicated lay-bys outside city centre hotels shall require the co-operation of Dublin City Council and the Garda Siochana. Dublin City Council should initiate a discussion between city centre hotels and the Garda Siochana regarding drop-off points for hotels.

## **5. Overview**

The city of Dublin is renowned worldwide for its energetic pulse and important heritage. However, as travel becomes more widely accessible and affordable and tourists become more sophisticated, Dublin shall not continue to be an attractive destination into the future if certain negative issues are not addressed. From a lack of an integrated transport system to problems of litter and un-cleanliness, there are identifiable areas which, if dealt with, could instantly impact positively upon the attractiveness of the city as a tourist destination. Tourism generates a large sum of income for the city, thus it is important that actions are taken to ensure that the city becomes a safe, clean, accessible and welcoming destination. We believe that the future of tourism in Dublin is through investing in ABC:- Arts, Business and Culture.

## Appendix

### EU RULES APPLICABLE TO THE RECOVERY OF INPUT VAT INCURRED BY BUSINESS TRAVELLERS

	Hotel (accommodation) expenses		Restaurant (dining) expenses	
	VAT Rate	Deductibility	VAT Rate	Deductibility
Austria	10%	YES (100%)	Meals 10%, Beverages 20%	YES (50%)
Belgium	6%	NO(Note 1)	21%	NO (Note 1)
Cyprus	5%	NO (Note 1)	5%	NO (Note 1)
Czech Republic	5%	Yes	19%	Yes
Denmark	25%	YES (25%) (Note 2)	25%	YES (25%)(Note 2)
Estonia	5%	NO (Note 3)	18%	NO
Finland	8%	YES (100%)	22%	YES (100%)
France	5.5%	NO	19.6%	Yes(100%)
Germany	16%	YES (100%)	16%	YES (100%)
Greece	8%	NO	8%	NO
Hungary	15%	YES (100%)	15%	NO
Ireland	13.5%	NO	13.5% Some Beverages 21%	NO
Italy	10%	NO	10%	NO
Latvia	9%	NO	18%	Partial – Note 4
Lithuania	5%	NO	18%	NO –Note 5
Luxembourg	3%	YES (100%)	3%	YES (100%)
Malta	5%	NO	18%	NO
Netherlands	6%	YES (100%)	6%	NO
Poland	7%	NO	7% Some beverages 22%	NO (Note 6)
Portugal	5%	NO	12%	NO
Slovakia	19%	NO(Note1)	19%	NO(Note 1)
Slovenia	8.5%	NO	8.5%	NO
Spain	7%	YES (100%)	7%	YES (100%)
Sweden	12%	YES (100%)	25%	YES (100%)(Note 7)
United Kingdom	17.5%	NO(Note1)	17.5%	NO (Note 1)

Note 1: Deduction is allowed for expenditure on staff

Note 2: No deduction for expenditure on staff or owners. Only expenditure of a commercial nature.

Note 3: Can deduct accommodation services received during a business trip

Note 4: No deduction for goods and services not used for business activities.

Note 5: Unless it can be deducted from income when calculating profit.

Note 6: Deduction allowed if providing tourist services or acquisition of prepared meals for transport services.

Note 7: Only VAT element on 90 Swedish crowns VAT deductible per person.

Source: Research conducted by Mazars Offices, Europe



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