

TOURISM ACTION PLAN 2016 -2018



Tourism Leadership Group



**An Roinn Iompair
Turasóireachta agus Spóirt**

Department of Transport,
Tourism and Sport

Tourism Action Plan 2016-2018

TOURISM LEADERSHIP GROUP

MINISTERS' STATEMENT



2015 was a record year for Irish tourism, with over 8.6 million overseas visits to Ireland, surpassing the previous peak of 2007. It was also the fifth successive year of growth in overseas tourism to Ireland which is a testament to the quality of Ireland's tourism offering and the professionalism of the Irish tourism industry. The Government has also played its part with strong pro-tourism policies since coming into office in 2011, including the introduction of a reduced 9% rate of VAT on tourism services, the removal of the Air Travel Tax, and innovative initiatives like The Gathering in 2013.

We recognise however, that the outstanding recent performance does not mean that we can divert our focus from the tourism sector. With this in mind, in March 2015, the Government published our Tourism Policy Statement *People, Place and Policy – Growing Tourism to 2025*. The Tourism Policy Statement contains three headline targets:

- Revenue from overseas tourism, excluding air fares and ferry charges, will rise from €3.5 billion in 2014 to €5 billion per year by 2025, net of inflation,
- 250,000 people employed in tourism by 2025, compared with approximately 205,000 at present.
- There will be ten million overseas visits to Ireland by 2025, compared to 7.6 million in 2014.

The Statement contained 51 policy objectives that the Government wished to see implemented in order to achieve the goals described above. The targets are ambitious and factors that could impinge on our ability to deliver them include any future global economic downturn, significant adverse exchange rate movements or geopolitical or terrorism concerns, which may affect tourism volumes to and within Europe generally.

The Policy Statement was also clear that it would be necessary to convert the longer-term policy objectives into specific actions to be achieved within a defined timeframe. In July 2015, a Tourism Leadership Group was appointed to put in place a Tourism Action Plan that would agree the actions required in the period to 2018, to achieve the overall objectives in *People, Place and Policy – Growing Tourism to 2025*.

The Tourism Leadership Group is drawn from a cross-section of representative bodies in the tourism sector, as well as from the tourism agencies, the Local Authority sector, regional and community tourism, retail, and tourism technology sectors. The Group held a series of meetings between August 2015 and January 2016 at

which outside tourism stakeholders were also invited to give their views on the type of actions to be included in the finalised plan. While the topics covered were broad, the key concern that arose on a recurring basis was the need to have adequate capacity both in human capital and physical infrastructure to ensure that our growing visitor numbers continue to enjoy a memorable holiday experience in Ireland. Actions to address these concerns will be a particular focus for the short term.

Following their deliberations, the Tourism Leadership Group agreed on a total of 23 actions to be addressed in the period between now and 2018 aimed at securing continued growth in overseas tourism revenue and employment. The actions address a range of key issues, including the marketing of Ireland as a visitor destination overseas, visitor access to and within Ireland, the effective presentation of Irish culture, sport, and events to visitors, the role of Local Authorities in supporting tourism, visitor accommodation capacity, and skills development in the tourism sector. The actions are directed at specific tourism stakeholders in the public and private sectors, all of whom are expected to proactively work towards completion of each action within the specified timeframe.

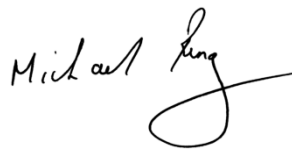
In addition to the specific actions in this Plan, work is ongoing to address general concerns for the tourism sector as highlighted in the Policy Statement. These include seasonality, regionality, and our overall competitiveness. The tourism agencies in particular will continue to target these issues in their business planning process. Furthermore, by its nature tourism is affected by a wide range of policies across Government and, accordingly, the Department of Transport, Tourism and Sport will continue to actively engage with other Government Departments to ensure that tourism considerations are fully factored in to the decision making process.

While this first Action Plan is now agreed, the work of the Tourism Leadership Group is far from finished. There will be a periodic reporting process to record progress towards the identified actions, and a corrective process where progress does not meet expectations. Tourism is constantly evolving and as conditions change, the Group may also wish to suggest additional areas for attention.

We wish to thank most sincerely the members of the Tourism Leadership Group for their work to date and the generosity with which they gave their time and expertise. Their contributions, based on frontline knowledge of the sector and its operating environment, has provided us with key insights that have enabled this Plan to be focused on the priority areas that should be addressed. We are confident that the implementation of the actions set out in this Tourism Action Plan will provide a foundation for the continued sustainable growth of Ireland's tourism sector and provide a strong impetus towards the achievement of the targets in *People, Place and Policy – Growing Tourism to 2025*.



Paschal Donohoe T.D.
Minister for Transport, Tourism and Sport



Michael Ring T.D.
Minister of State for Tourism and Sport

Appendix I: List of Actions

No.	Action	Suggested Date for Completion	Responsible Stakeholder(s)
Skills in the Tourism Industry			
1.	The Tourism Leadership Group highlights the critical importance of ensuring that there is an adequate supply of skilled staff in the tourism sector, including key roles such as chefs, food service, accommodation services, and tour guides. Fáilte Ireland, the tourism industry and the education and training sector will work to implement the recommendations in the report of the Expert Group on Future Skills Needs in the hospitality sector, and participate in the national oversight and advisory group established to oversee skills development and promotion in the tourism sector.	2016-2018	SOLAS, Higher Education Authority (HEA), Quality and Qualifications Ireland (QQI), Fáilte Ireland, Education and Training Boards Ireland, Institutes of Technology Ireland, Tourism Industry.
Visitor Accommodation			
2.	In Spring of 2016, Fáilte Ireland will publish an analysis of visitor accommodation capacity issues in Dublin City for the period to 2020 with recommendations on how to address any shortfalls. An official estimate of the shortfall, if any, in hotel capacity will be published on a regular basis. Furthermore, an analysis of why hotels which have planning permission granted but are not being developed will be undertaken and any recommendations arising from this analysis will be pursued.	2016	Fáilte Ireland, Department of Transport, Tourism and Sport (DTTAS), Dublin Local Authorities.
3.	To address capacity concerns and to assist tourism competitiveness, Fáilte Ireland will review the appropriateness of allowing accommodation not regulated or listed by the Agency to be referenced on its website and through the Tourist Information Office network. Fáilte Ireland and Tourism Ireland will incorporate any such changes in their respective business plans as appropriate.	2016	Fáilte Ireland, Tourism Ireland, Tourism Industry.
4.	Regulations governing visitor accommodation will be reviewed and updated to address changing market needs, and developments such as the growth of the	2016	Fáilte Ireland, Tourism Industry.

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	sharing economy. An expert group from the Fáilte Ireland executive and the tourism industry will make recommendations to the National Tourism Development Authority.		
Overseas Tourism Marketing			
5.	Recognising the contribution of tourism to employment growth, the Minister, in consultation with Cabinet colleagues, will seek to restore Ireland's share of voice in key overseas tourism markets through restoring overseas tourism marketing funds to pre-recession levels on a phased basis.	To be phased in from 2016	DTTAS
6.	The dedicated Dublin tourism marketing fund, initially established in 2015 to fund the launch of the new Dublin experience brand 'Dublin – A Breath of Fresh Air' will be continued as a platform to fund additional overseas marketing of the Dublin region as a tourist destination. Tourism Ireland will execute the overseas marketing activity on behalf of Fáilte Ireland and the Grow Dublin Tourism Alliance.	2016	Fáilte Ireland, Grow Dublin Tourism Alliance (GDTA), Dublin tourism industry and business community, Tourism Ireland.
7.	To support direct access by overseas visitors, the Regional Co-operative Market Access Scheme to promote air and sea access to the regions outside of Dublin will be extended until 2018. The fund will be administered by Tourism Ireland with matching funding by airports and ports and regional tourism stakeholders including Local Authorities.	2016-2018	Tourism Ireland, DTTAS, airports and port companies outside Dublin, Local Authorities, local tourism interests.
8.	DTTAS will arrange for an independent evaluation of Ireland's overseas tourism marketing expenditure, and the findings of this evaluation will be shared with the tourism industry.	2017	DTTAS
The Visitor Experience			
9.	The tourism agencies, in collaboration with DTTAS and tourism industry stakeholders, will draw up a shortlist of suggested themes (including the possibility of a successor to The Gathering) for a focused tourism marketing	2016	Fáilte Ireland, Tourism Ireland, Tourism Industry.

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	<p>initiative. A decision will be made by Government in the first half of 2016, with the initiative to take place in 2018 or a subsequent year. In looking at potential themes, priority will be given to those that are likely to maximise the potential overseas tourism revenue. In addition, the scope for all-island themed years will be examined in association with tourism authorities in Northern Ireland.</p>		
10.	<p>Supports for festivals and events will be updated to reflect changing market needs, including:</p> <ul style="list-style-type: none"> - a review by Fáilte Ireland of the structures and procedures that are used to target significant visiting international events, with a particular focus on offsetting seasonality; - identifying key indigenous events with the greatest potential for attracting international visitors and offsetting seasonality, to be supported by a multi-annual funding framework; - funding decisions to be provided to organisers with sufficient lead time so that their respective events can be programmed by tour operators in their overseas marketing; - a review of arrangements for regional and community festivals to ensure maximum value for money in terms of incremental overseas visitors. 	2017	Fáilte Ireland, Local Authorities, Cultural Agencies.
11.	<p>Within the framework of the forthcoming National Cultural Policy, and the new DAHG-led Strategic Partnership Steering Group on Heritage, relevant Government Departments and agencies will collaborate to improve promotion of, access to, and presentation of Ireland's cultural heritage and State owned natural and built heritage sites.</p>	2016-2018	Department of Arts, Heritage and the Gaeltacht, Office of Public Works (OPW), DTTAS, Tourism agencies.
12.	<p>DTTAS and the tourism agencies will also identify those State agencies (outside of the tourism and cultural sector) with potential to contribute to the quality of the visitor experience, and will develop Memoranda of</p>	2016	DTTAS, Tourism agencies.

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	Understanding with these agencies as appropriate.		
13.	Fáilte Ireland and Bord Bia will collaborate on the development of food-related experiences for tourists, including the promotion of food, beverages and marine trails that highlight the very high quality of Irish food and beverages for visitors. The food experiences will align closely with the three tourism experience brands (Wild Atlantic Way, Ireland's Ancient East, and Dublin - A Breath of Fresh Air).	2016-2017	Fáilte Ireland, Bord Bia, Department of Agriculture, Food and the Marine, Local Authorities.
The Contribution of Sport to Tourism			
14.	The Government, in collaboration with the Northern Ireland Executive, will strongly support the Irish Rugby Football Union bid to host the 2023 Rugby World Cup.	2016-2017	Irish Rugby Football Union, supported by DTTAS, Northern Ireland Department of Enterprise Trade and Investment, Fáilte Ireland, Tourism Ireland, and the tourism industry.
15.	Fáilte Ireland will engage with relevant sporting and cultural bodies to explore how to make uniquely Irish sporting/cultural experiences more accessible to overseas visitors.	2016	Fáilte Ireland, sporting and cultural bodies.
16.	The forthcoming National Sports Policy, to be published in 2016, will include specific objectives with regard to sports-related tourism.	2016	DTTAS
Technology in Tourism			
17.	Fáilte Ireland will assist tourism enterprises to maximise their online engagement with potential visitors. This will be particularly important given the forthcoming upgrade to next generation broadband which is expected to reach 85% of all premises in the country by 2018 and 100% of premises by 2020.	2016-2018	Fáilte Ireland, Tourism Ireland.
18.	The provision of Wi-Fi connectivity at outdoor locations, particularly at the signature points along the experience	2016-2018	Fáilte Ireland, Tourism

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	brands, will be encouraged to support visitors in sharing their images of Ireland through social media.		Ireland, Local Authorities.
Planning for Future Growth			
19.	Within the framework of the brand architecture, Fáilte Ireland will examine the capital investment and enterprise supports that will be required in the tourism sector in order to meet the 2025 targets set out in the Tourism Policy Statement, and the agency will produce an updated strategy in this regard.	2016	Fáilte Ireland
20.	A new targeted strategy to increase visitor numbers and revenue from new and developing markets will be developed. The strategy will focus not only on marketing but also on the training and up-skilling that is required for the tourism industry here to meet the needs of visitors from these markets. The results of the research will be reported back to the Tourism Leadership Group.	2016-2017	Fáilte Ireland, Tourism Ireland, Tourism Industry, Department of Foreign Affairs and Trade.
21.	<p>In recognition of the importance of tourism to local economies and the contribution of Local Authorities to tourism development:</p> <ul style="list-style-type: none"> - Local Authorities will, under the auspices of the County and City Management Association, convene a Tourism Strategy Sub-group, whose primary objective will be to facilitate the sharing of best practice on developing tourism. - Guidelines, including a draft template for Local Authority tourism strategies, consistent with the policy objectives in 'People, Place and Policy - Growing Tourism to 2025', will be developed. - Following approval of the template, each Local Authority will be required to produce a tourism strategy (or update its existing strategy) within this common template. - The tourism agencies will engage with individual Local 	2016-2018	Local Authorities, DTTAS, Department of Environment, Community and Local Government, Fáilte Ireland, Tourism Ireland.

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	<p>Authorities that have developed / are developing links with the diaspora from their respective counties in order to examine the opportunities for collaboration.</p> <p>- A conference addressing best practice in the Local Authority / Community tourism field will be organised in 2016 in order to bring together the varied stakeholders in local tourism to exchange best practice.</p>		
22.	<p>A review of the effectiveness of existing supports available to new tourism enterprises will be undertaken, including the potential to establish a start-up fund to support innovative tourism projects, involving collaborative approaches at Local Authority and community levels.</p>	2016	DTTAS, Fáilte Ireland, Local Authorities.
23.	<p>The Fáilte Ireland Visitor Attitudes Survey will be updated to reflect the wider range of factors influencing visitor satisfaction. The findings of this research will inform future public investment decisions.</p>	2016-2018	Fáilte Ireland, DTTAS.

Appendix II: Membership of Tourism Leadership Group

Shaun Quinn, CEO of Fáilte Ireland

Niall Gibbons, CEO of Tourism Ireland

Peter Hynes, Chief Executive, Mayo County Council (representing the Local Authority sector)

Ruth Andrews, Chief Executive of the Incoming Tour Operators Association (ITOA)

James McGinley, Director, McGinley Coaches, Co. Donegal

Stephen McNally, President of the Irish Hotels Federation (IHF)

John McQuillan, Technology entrepreneur

Cormac Ó Donnchú, Founder of Experience Gaelic Games

Emma O'Brien, Solicitor - Collins Brooks and Associates, Director of Clonakilty Chamber of Commerce, Member of the Cork Airport Development Council

Deirdre McGlone, Proprietor, Harvey's Point Hotel, Lough Eske, Donegal

Ray Hernan, former CEO of Arnotts

Ken Spratt Assistant Secretary, Department of Transport, Tourism and Sport