

Heather Cooke

From: Eoghan O'Mara Walsh <eoghan@itic.ie>
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Eoghan O'Mara Walsh
Chief Executive



Irish Tourism Industry Confederation
Ground Floor,
Unit 5, Sandyford Office Park,
Dublin 18
Tel: +353 (1) 2934950

Email: eoghan@itic.ie

Web: www.itic.ie

Registered in Dublin No.75658



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Submission in response to

Eastern & Midland Regional Assembly's

Draft Regional Spatial & Economic Strategy

Date: 23rd January 2019

The Irish Tourism industry Confederation (ITIC) - the representative body of the Irish tourism industry – welcomes the publication of the draft Regional Spatial and Economic Strategy and acknowledges the depth of valuable analysis and proposals it contains. The strategic framework is a valuable planning tool for the tourism sector and ITIC welcomes the opportunity to comment on the draft presented by the EMRA for comment.

ITIC's membership of almost 30 representative organisations covering all sectors of the travel and hospitality industry, including accommodation, food & beverage, transport, ports, visitor attractions and entertainment, are dependent on a supportive forward planning framework at national and regional level to inform and facilitate continued investment and economic activity in the tourism sector.

A tourism perspective

Tourism is Ireland largest indigenous industry with an estimated value in excess of €9 billion in 2018. The industry which has shown remarkable resilience and sustained growth in recent years currently supporting in excess of 270,000 jobs in the economy – providing employment in many areas of the country with limited job opportunities. Not only does tourism sustain local communities and social networks, particularly in rural areas, throughout the state but also supports the presentation of our natural, cultural and artistic heritage.

Tourism: An industry's Strategy for growth to 2025, devised and developed by business, published by ITIC in 2018, sets out ambitious goals and objectives for inbound tourism that can lead to higher revenues, more jobs and greater exchequer receipts. The plan, devised by business and facilitated by Government, provides a road map for the development of tourism over the next 6 years. Implementation of the plan's recommended programme of strategic and tactical actions is currently underway, in cooperation with the state agencies and other facilitators. Monitoring and progress reports from ITIC are published at six monthly intervals.

While the immediate outlook for continued tourism growth is positive it is not without its challenges. A key challenge is ensuring that Ireland's tourism offering continues to competitively meet the needs of the market – a market which is becoming more diversified, more demanding and seeking more authentic experiences. A focus on product innovation and differentiation, environmental sustainability, quality service and value for money have been identified as critical to securing a successful future for the industry.

The tourism profile of the Eastern & Midlands Regional Assembly's area is one of stark contrasts, with the Dublin Metropolitan area the country's dominant tourism destination while several counties of the regional are amongst the lowest tourism demand densities in the State. There is a marked contrast

between the well developed tourism infrastructure, attractions and services of the capital region and the, as yet, relatively undeveloped tourism infrastructure of the inland midland counties. Dublin's tourism carrying capacity is under pressure from ever increasing demand as the state's dominant gateway and most popular tourism venue while many parts of the broader region are under utilised in tourism terms.

Dublin attracts almost one third (32%) of overseas and domestic tourism expenditure in the State compared to counties Laois and Longford which each currently attract less than 1% share.

The launch of Ireland's Ancient East, and more recently, Ireland's Heartland, brands should help to address the imbalance. While the capital will continue to attract ever increasing tourism volumes and revenues, in absolute and relative terms, the opportunity exists for the remainder of the region to improve its share of tourism visits and expenditure.

The imminent opening of Centre Parc's resort at Ballymahon, Co. Longford is an excellent example of innovation in the sector which will undoubtedly drive demand and boost the local economy. Success in boosting demand across the region outside of the capital will depend on providing 'reasons to visit' so that the areas can compete for an increased share of both overseas and domestic tourists. The current profile of the broader region is eminently suitable to exploit the potential of the natural environment and cultural heritage to attract more visitors. Greenways and Blueways already planned represent positive developments for the region. However, there are a number of current weaknesses in the region's tourism infrastructure, including connectivity, accommodation options, visitor themed trails, interpretation of the area's rich history, and attractions of scale.

Dublin Metropolitan area's challenges include managing growth to ensure investment in public infrastructure and in businesses to meet demand and ensuring that the city's competitiveness is not damaged by infrastructure shortcomings, particularly in respect of port facilities, urban and national transportation links. It is anticipated that Dublin will increase in relative importance as a tourism gateway to Ireland over the coming years.

Some specific comments on the Draft

The region, as it encompasses Dublin, is the tourism engine of the State.

ITIC endorses the Regional Strategic Outcomes (RSOs) as supportive of the achievement of the tourism sector's vision and goals for the medium to longer term development of the hospitality business capable of delivering economic growth, including increased employment, for the region.

The growth strategy, focused on the Capital City, the Metropolitan Areas, the Hinterland and Outer Region broadly reflect the spatial and economic classification of tourism intensity and developmental potential.

The settlement strategy would appear to provide the necessary community and human resource requirements to sustain an expanded tourism sector in line with the national aspiration and goals for sustainable tourism growth.

The economic strategy is perhaps the dimension of greatest interest to tourism businesses. Competitiveness has been identified as the key to continued success for Ireland's tourism. The strategic

goals of place-making and clustering are especially relevant to tourism development and as such are the strategic statement is welcomed by ITIC. An economic environment of smart specialisation and orderly growth are also important business environmental factors which will help to shape a more competitive tourism sector within the region.

As previously mentioned, the natural environment is a regional characteristic and an asset of much of the region which has the potential to attract visitors to many parts as yet relatively undiscovered in tourism terms. The continued expansion of Dublin city and metropolitan areas generates a particular set of environment challenges which need to be addressed to ensure that the quality of life for residents is not diluted by continuous growth. From a tourism perspective as environmental awareness and its value grows internationally the quality a destination's environment has become a key component of attractiveness and competitiveness. The management of the city's range of environmental factors will be a critical factor in maintaining competitiveness and avoiding the risk of 'over tourism'.

Connectivity, from outside and within the State, is a primary determinant of tourism flows. Planning to ensure that adequate capacity at the State's two main air and sea entry ports at Dublin would appear to be well underway with both the Dublin Airport Authority and Dublin Port Company implementing comprehensive development investment programmes. Internal transportation strategy, including urban and interurban and rural, would appear to be less well defined.

While the strategy outlined represents a positive enabling step to guiding the future tourism development within the region, a major concern for the sector would centre on the structures and processes to ensure a cohesive and integrated implementation. The public sector architecture involving government departments, regional assemblies, local authorities and state agencies presents a particular challenge in delivering an effective and efficiency of an integrated implementation programme. From the tourism industry's perspective clarity on strategies, decision making and implementation are essential for good investment decisions by businesses engaged in tourism. ITIC would welcome a transparent process in taking the strategy forward together with public monitoring of implementation programmes.

ITIC is more than willing to assist the Regional Assembly in its work on finalising the strategy.

ITIC, Ground Floor, Sandyford Office Park, Dublin 18 www.itic.ie

Online: emra.ie/submission

Email: rses@emra.ie

