

# IRISH HOTELS FEDERATION

SUBMISSION TO THE

DEPARTMENT OF HOUSING, PLANNING,  
COMMUNITY AND LOCAL GOVERNMENT

ON THE

NATIONAL PLANNING FRAMEWORK

IRELAND 2040 OUR PLAN



MARCH 31<sup>ST</sup> 2017

## 1. INTRODUCTION

The Irish Hotels Federation (IHF) welcomes the opportunity to engage with the Government on the preparation of the National Planning Framework 'Ireland 2040 Our Plan,' which will provide the framework for future development and investment throughout the country based on shared national development goals.

The IHF, founded in 1937, is the national representative organisation of the hotel and guesthouse sector in Ireland, representing the interests of over 1,000 businesses. As a key stakeholder in Irish tourism, we work with our industry partners to ensure the right conditions are in place for tourism to grow and prosper, thereby contributing to recovery and job creation in the economy.

Tourism is one of Ireland's largest indigenous industries and is essential for Ireland's economic well-being. It is a major source of employment generation across the entire country and is of enormous importance to many areas with an otherwise weak economic base. As a result, tourism development has a very positive influence on regional development by helping to diversify employment options and stabilise rural and regional populations.

Having supported the creation of over 50,000 new jobs during the last five years, tourism now employs more than 220,000 people throughout the country – equivalent to 11% of total employment. In 2016, tourism generated total revenues of €8.25 billion for the economy, made up of €1.76 billion in domestic tourism revenue and €6.49 billion in foreign exchange earnings and carrier receipts. Overall, tourism accounts for 4% GNP. It contributed an estimated €1.9 billion in taxes to the exchequer last year.

With almost 60,000 people directly employed by hotels and guesthouses across every town and village, the hotels sector plays a critical role in contributing to growth in tourism and sustaining long-term economic prosperity in every village, town and county.

The recovery in tourism has been underpinned by a strong strategic focus by the Government and state agencies working closely with industry stakeholders to enhance the attractiveness of Ireland as a tourism destination. Key initiatives have included policy measures such as the 9% tourism VAT rate, which has brought Ireland more closely in line with tourism VAT rates in other European countries with which we compete. This has made us more competitive when marketing Ireland internationally. Other important measures introduced in recent years include the zero rate air passenger tax and the liberalisation of the visa regime for visitors from selected markets.

Given the vital economic role played by Irish tourism, it is essential that our industry remains at the heart of national economic policy and aligned with the objectives of the National Planning Framework (NPF). Our submission sets out key areas of strategic focus for tourism and proposals for harnessing the industry's full potential as an engine of long-term economic growth.

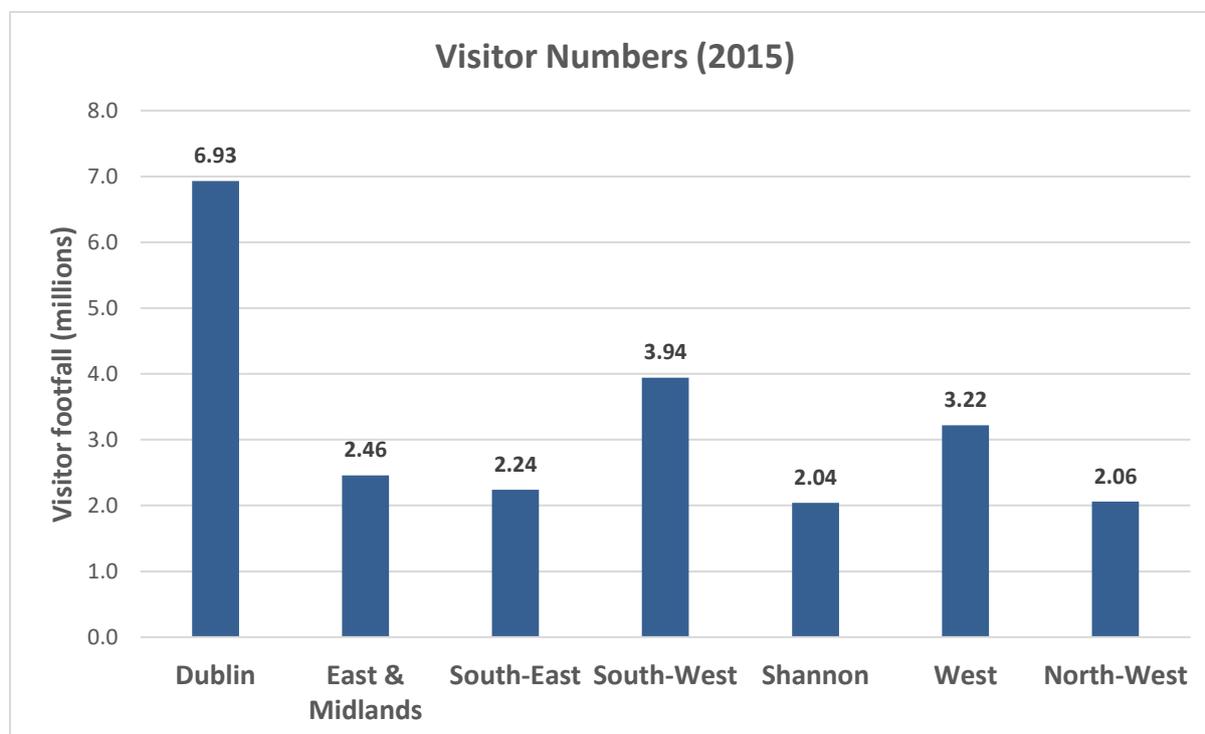
## 2. NATIONAL OVERVIEW OF IRISH TOURISM

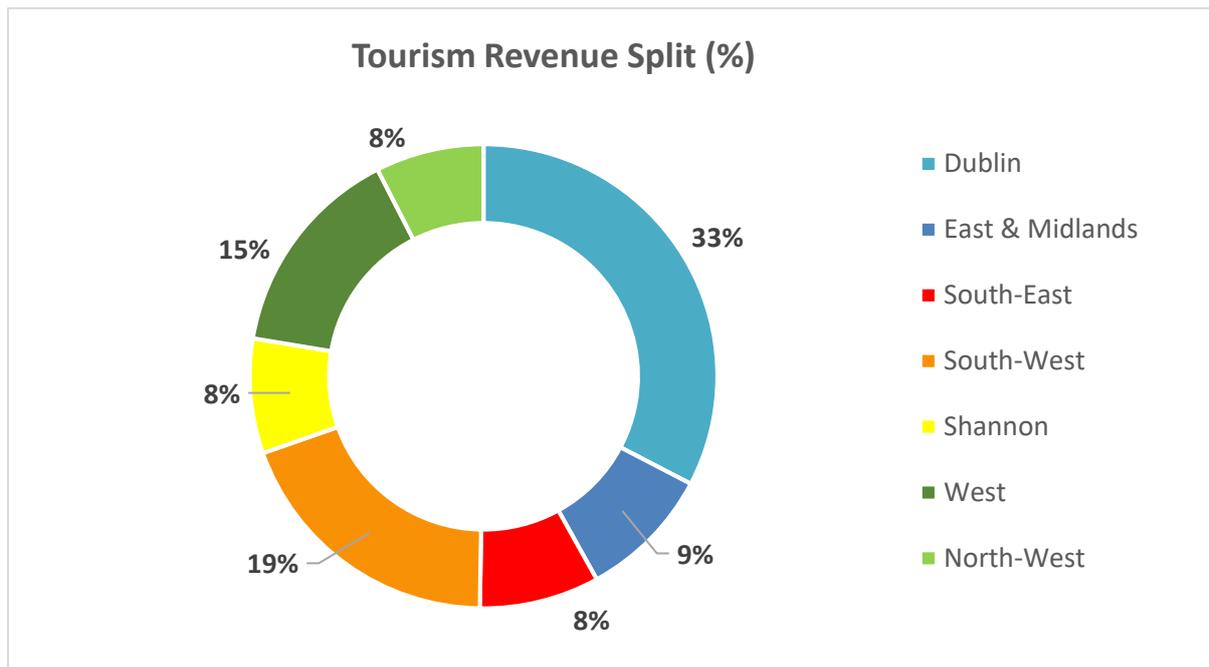
The IHF supports the increased focus on the regional dimension of national policy across Government Departments and State Agencies. As outlined in the NPF position paper, Regional Assembly and Local Authority areas have an important role to play in the delivery of national planning policy and effective regional development that maximises the capabilities of each region. This is particularly relevant from a tourism perspective given the interconnected nature of investment in tourism product development and the regional overlap with respect to spatial planning and transport infrastructure.

**Ireland’s tourism destinations can broadly be categorised by three types of area:**

1. Established tourism destinations, including large urban areas and tourism hotspots. These include cities such Dublin, Cork and Galway, the Mid West region and towns such as Killarney and surrounding areas.
2. Developing tourism areas such as other parts of the West coast, high-amenity areas close to large cities and inland areas associated with water based recreation.
3. Underdeveloped tourism destinations such as rural areas with potential for further tourism-based development.

Geographically, tourism activity and revenue generation is mainly concentrated around Dublin – which, as the capital city, acts a major gateway for visitors – as well as the West coast and Southern Region.





While Irish tourism has achieved strong growth in recent years following the downturn, continued growth cannot be taken for granted. It requires long-term investment, both in terms of our tourism product and our tourism infrastructure. We are an island destination and face some unique challenges in terms of access and competitiveness. So, it is vital that we have a tourism strategy in place that delivers sustainable, long-term growth that continues to benefit the local economies and the communities in which tourism businesses operate.

A major objective for the tourism industry is to broaden Ireland’s tourism base and achieve a greater distribution of visitors throughout the country, including to regions which have been underdeveloped but have significant tourism potential. Success in this area will require ongoing investment in order to fully harness Ireland’s tourism resources and cater for our target market segments. This is particularly true for tourism outside the key urban areas, which is mainly rural in nature. Another key objective is to extend the tourism season and achieve a more balanced spread of activity throughout the year.

Substantial progress is now being achieved with the rollout of initiatives such as the Wild Atlantic Way, Ireland’s Ancient East and ‘Dublin – A Breath of Fresh Air,’ demonstrating the critical importance of continuously rejuvenating our tourism proposition and providing a greater range of compelling reasons to visit:

- **Wild Atlantic Way:** the world’s largest designated coastal touring route, spanning from Donegal to Cork. (*Regions: North West, West, Shannon, South West*)
- **Ireland’s Ancient East:** showcasing the culture and ancient heritage east of the Shannon, outside of Dublin. (*Regions: East & Midlands; South East; parts of North West*)
- **Dublin – A Breath of Fresh Air:** positioning Dublin as a vibrant capital city nestled alongside mountains and the seas. (*Regions: Dublin and surrounding areas*)

**Regional breakdown of tourism activity 2015 - visitors and tourism revenue (direct spend)**

<b>Eastern and Midland Region</b>		<b>Overseas Visitors*</b>	<b>Visitors from Island of Ireland**</b>	<b>Overall</b>
Dublin	Visitors	4,937,000	1,990,000	6,927,000
	Revenue	€1,726.2m (40.5%)	€345.4m (16.6%)	€2,071.6m (32.7%)
East & Midlands	Visitors	922,000	1,542,000	2,464,000
	Revenue	€323.7m (7.6%)	€268.9m (12.9%)	€592.6m (9.3%)
<b>Total Revenue:</b>		<b>€2,049.9m (48.1%)</b>	<b>€614.3m (29.6%)</b>	<b>€2,664.2m (42.0%)</b>
<b>Southern Region</b>		<b>Overseas Visitors*</b>	<b>Visitors from Island of Ireland**</b>	<b>Overall</b>
South-East	Visitors	876,000	1,364,000	2,240,000
	Revenue	€258.9m (6.1%)	€267.7m (12.9%)	€526.6m (8.3%)
South-West	Visitors	2,104,000	1,840,000	3,944,000
	Revenue	€791.8m (18.6%)	€438.4m (21.1%)	€1,230.2m (19.4%)
Shannon	Visitors	1,148,000	890,000	2,038,000
	Revenue	€366.8m (8.6%)	€138.6m (6.7%)	€505.4m (8%)
<b>Total Revenue:</b>		<b>€1,417.5m (33.2%)</b>	<b>€844.7m (40.7%)</b>	<b>€2,262.2m (35.7%)</b>
<b>Northern and Western Region</b>		<b>Overseas Visitors*</b>	<b>Visitors from Island of Ireland**</b>	<b>Overall</b>
West	Visitors	1,590,000	1,628,000	3,218,000
	Revenue	€574.5m (13.5%)	€368.9m (17.8%)	€943.4m (14.9%)
North-West	Visitors	694,000	1,362,000	2,056,000
	Revenue	€224.1m (5.3%)	€248.6m (12%)	€472.7m (7.5%)
<b>Total Revenue:</b>		<b>€798.6m (18.7%)</b>	<b>€617.5m (29.7%)</b>	<b>€1,416.1m (22.3%)</b>
<b>Total Revenue (national):</b>		<b>€4,266m</b>	<b>€2,076.5m</b>	<b>€6,342.5m</b>

Source: CSO/Fáilte Ireland NISRA/Central Bank of Ireland

\*excluding carrier receipts (estimated at €1.7 billion)

\*\*including visitors originating from Northern Ireland

### 3. STRATEGIC ALIGNMENT WITH NPF

The international tourism industry in which we operate is exceptionally competitive and Ireland fights hard for every visitor and tourism euro earned. It is therefore vital that we enhance our investment in tourism product development and capacity so that our offering keeps pace with global competition.

The NPF provides an opportunity to ensure that positive outcomes arising from tourism growth are shared throughout the country, thereby supporting employment potential, achieving effective regional development and encouraging both rural and urban regeneration to address decline.

We are an island destination and face some unique challenges in terms of access. Not only do we need to invest in giving people compelling reasons to visit our shores, but we need to invest in tourism access – in terms of cost-effective international access via ports and airports as well as local access through road and rail infrastructure.

For each category of tourism area outlined above, specific spatial responses are required in order to optimise the contribution of the sector to effective regional development - playing to the strengths of each region, while protecting the assets that make these areas attractive for visitors. The objective should be to enhance and broaden the number of tourism locations, thereby increasing the attractiveness of rural areas and the sustainability of towns and villages as places to live and work.

Effective responses should include addressing infrastructural bottlenecks, promoting off-season activity to spread demand, augmenting the capacity of developing tourism areas, exploiting opportunities in tourism niches and building upon underdeveloped locations where parallel investment in transport infrastructure is increasing accessibility from major population centres.

For example, there are strong opportunities for us to expand tourism linked to:

- Agriculture and food along with our green brand, developing food trails that celebrate the diversity and quality of the native produce;
- Exploit the synergies between tourism and sport, particularly between rural tourism and the GAA;
- Leverage convergence between tourism and other areas of enterprise, such as film, food and arts;
- Greater capital investment in facilities focused on the great outdoors – walking, hiking, cycling, boating, adventure, equestrian and wilderness trails.

A key challenge for Irish tourism, however, is the inadequate levels of investment by the State in tourism infrastructure and product development. Additional investment will be required if tourism is to continue to grow, increase jobs, and provide an economic stimulus nationwide. As part of a long-term planning strategy, visibility of tourism capital funding should be provided over five-year periods to enable more efficient policy implementation.

## 4. NATIONAL TOURISM POLICY PRIORITIES

Examples of key national tourism policy priorities are set out below:

### Wild Atlantic Way

- Continue to invest in growing the Wild Atlantic Way as a major tourism attraction.
- Invest along the route in strategic visitor points linked to the wider local communities to entice visitors to spend more time exploring their surrounds.
- Greater focus on growing tourism activity in the northern half of the Wild Atlantic Way to exploit capacity opportunities.
- Allocate resources to manage tourism activity in the southern half of the route, particularly where congestion or overcrowding may in time detract from the overall visitor experience.

### Ireland's Ancient East

- Harness the brand proposition of Ireland's Ancient East to reposition rural areas in the east and south from transit and day-tripping zones to destinations that attracts overnight visitors.
- Develop a number of tourism hubs in the region with critical mass to drive tourism to the surrounding towns and villages.

### 'Dublin – A Breath of Fresh Air'

- Encourage visitor flow outside the city centre by incorporating links to the sea and mountains as key elements of the Dublin visitor experience. This will require the provision of better access and transport to the Dublin and Wicklow mountains in particular if this is to succeed.
- Address the current accommodation capacity issues in Dublin City by ensuring that proactive planning policies are incorporated to all planning policies at both national and local/ City level.

### Shannon Tourism Corridor

- Immense potential exists to establish a tourism corridor along the Shannon River from south Ulster, through the midlands and to north Munster – taking in 11 counties (Cavan, Leitrim, Longford, Roscommon, Westmeath, Offaly, Tipperary, Galway, Clare, Limerick and Kerry).
- This is an excellent example of an underdeveloped rural destination with largely untapped tourism potential that could have enormous regional benefits.
- The initiative would emulate the successes of the Wild Atlantic Way and focus on Ireland's lake lands and 'slow tourism' proposition, including walking, cycling and boating. It would link in with agriculture and food (along with our eco-tourism / green brand), promote healthy tourism with wholesome foods and wellbeing activities such as the exploration of natural habitats and the great outdoors.
- It would include the Shannon lakes and Loughs Allen, Ree and Derg while encompassing towns such as Carrick-on-Shannon, Athlone and Killaloe. The area would encompass existing "blueway" tourism amenities such as the waterway and waterside routes through Leitrim and Roscommon. It would take in "greenway" walking and cycling routes such as that linking Mullingar and Athlone and walking trails in the Slieve Blooms, Laois and Offaly as well as around Lough Derg.
- The tourism initiative, which requires further planning and feasibility assessment, would achieve a key objective of the NPF by providing effective regional development that maximises the capabilities of the Shannon corridor, its existing tourism resources and natural amenities.

## Other National Tourism Policy Priorities

- **Reasons to visit:**
  - Protect and promote the quality, character and distinctiveness of the Irish landscape, the sense of place and culture that make Ireland authentic and attractive to visitors.
  - Greater investment in infrastructural projects with long-term focus supportive of cultural, artistic and leisure activities.
  - Support the development of walking and cycling trails, greenways and public transport 'hop- on hop-off' services which operate between tourist attractions as well as nearby towns and villages.
  - Develop schemes to encourage landowners to support tourism through greater access to walks and trails.
  - Development of Coillte and other state land into sustainable tourist resources.
  - Enable greater access to the coastline, islands and marine waters where appropriate
  - Given the success of the Convention Centre Dublin in attracting increased business and conference tourism to the capital, ensure the removal of any barriers to progress on other convention and conference centre facilities such as in Cork, Galway and the Mid-West.
  
- **Access and infrastructure:**
  - Given the success of initiatives such as the Wild Atlantic Way, carry out a review of the entire regional road network and transport infrastructure from a tourism perspective.
  - Capitalise on opportunities to develop increased air access into Dublin, Cork and Shannon airports aligned with tourism infrastructure investment.
  - Explore the possibility of including major regional airports in the TEN-T Core network, which brings together public and private resources and concentrate EU support from the CEF (Connecting Europe Facility).
  - Explore the feasibility of developing high-speed rail access between Dublin and other major cities such as Cork, Belfast and Limerick.
  - Access to high-speed broadband is essential for our industry to innovate and attract visitors. However, the current quality of broadband is unsatisfactory in many rural areas, which detrimental to modern day tourism and visitor experience. This requires substantial investment in the rollout high speed fibre internet throughout the country.
  
- **Data and statistics:** Establish more comprehensive and timely industry data for enhanced understanding of tourism performance and its economic contribution.

## 5. EASTERN AND MIDLAND REGION - TOURISM POLICY PRIORITIES

Examples of key tourism policy priorities are set out below for the Eastern and Midlands region:

- **Ireland's Ancient East**
  - Further develop this tourism initiative as outlined above to maximise opportunities for parts of the East & Midlands
- **Shannon Tourism Corridor**
  - Explore opportunities to develop this future tourism initiative as outlined above to maximise opportunities for the East & Midlands
- **Dublin Airport**
  - Dublin Airport is of critical national and regional importance as an international gateway into Ireland. Its continued growth is vital for the economy and, as such, capacity challenges such as the need for a new runway and third terminal must be given the utmost priority.
  - Ongoing investment in effective transport to and from the Dublin Airport is a necessity to ensure the airports efficient operation as congestion presents significant risk to its functionality.
  - Priority must be given to developing a high-capacity, reliable and frequent public transport service to Dublin City Centre. As the capital city, the focus should be on completing the rail connection from the city centre to the airport.
  - Improved public transport network connectivity at a national level.
- **Dublin**
  - Enhanced public transport throughout the city and greater Dublin area.
  - Further develop the 'Dublin – Breath of Fresh Air' initiative as outlined above to maximise opportunities for Dublin and surrounding area.
  - Progress Metro North more rapidly than currently planned.
  - Support expansion of Dublin Port in conjunction with greater transport connectivity with Dublin City.
  - Intermodal public transport initiatives, such as Bus Rapid Transit, e-hubs and park and ride facilities to assist in reducing congestion.
  - Explore the feasibility of a Dart underground.
- **Wicklow**
  - Development of greenways and Blueways.
  - Scheme for landowners willing to allow parking on their land in Glendalough.
  - Measures to reduce rush hour traffic times on the N11.
  - Waste water treatment plant for Arklow, one hour from Dublin and raw sewage still pumped into sea.

## 6. SOUTHERN REGION - TOURISM POLICY PRIORITIES

Examples of key tourism policy priorities are set out below for the Southern region:

- **Wild Atlantic Way**
  - Further develop this tourism initiative as outlined above to maximise opportunities for the Shannon and the South West.
- **Ireland's Ancient East**
  - Further develop this tourism initiative as outlined above to maximise opportunities for the South East.
- **Shannon Tourism Corridor**
  - Explore opportunities to develop this future tourism initiative as outlined above to maximise opportunities for the Southern Region.
- **Cork**
  - Alignment with the 'Cork 2050' strategy:
    - Upgrade of Cork's transport network, the implementation of strategic road projects and the development of the City Docks and Tivoli areas.
    - Mechanisms to protect and enhance existing and proposed bus routes, and Greenway routes for walking and cycling.
    - Promote the potential of towns, village and rural areas outside Metropolitan Cork so as to contribute to the successful development of the region.
  - Develop the Cork to Sligo road route as part of the national road infrastructure.
  - Additional investment to maximise Cork's tourism potential in relation to the Wild Atlantic Way and Ireland's Ancient East.
- **Cork Airport**
  - Enhance Cork Airport's capacity to act as a tourism gateway to the Southern Region, offering significant growth opportunities for business travellers and holidaymakers.
  - Support growth in international connectivity to Cork Airport by providing the infrastructure necessary to expand the range of destinations directly served by the airport.
  - Invest in upgrading the N27 Cork-Cork Airport link.
- **Road infrastructure**
  - Development of an Intercity Motorway between Limerick & Cork.
  - Upgrade: Dunkettle Roundabout, the N28 and the N24.
  - N25 Cork-Waterford inter-urban route.
  - Improved signage along Shannon Estuary, particularly access routes and driving loops.
- **Kerry**
  - Bypasses are required for Adare/Newcastle West and Abbeyfeale (Co Limerick) as well as Macroom (Co Cork).
  - Additional support and funding is required to increase connectivity into Kerry Airport and facilitate additional connectivity into the region.
  - Improved signage with particular emphasis on access routes.

- **Limerick:**
  - Development of a Convention Centre in the Mid-West to help attract some of the larger Conferences to the Mid-West.
  - Alignment with the aims of ‘Capital Limerick’ which seeks to promote and re-establish the city and its environs as one of the state’s prime economic, cultural and strategic hubs.
  
- **Shannon Airport**
  - Continued development and support of Shannon Airport to facilitate further growth and air connectivity.
  - Implement policy initiatives that ensure the region benefits from future air traffic growth to Ireland over the period of the NPF and reflect the importance of air connectivity for the region’s continuing development.
  - Targeted assistance to develop air services and facilitate direct air connections to key European airports.
  
- **Waterford**
  - More efficient and cost-competitive public transport within and to/from Waterford
  - A third river crossing of the Suir – downriver will also need to be advanced in the coming years to support future development and growth.
  - Improved connectivity between Galway, Limerick, Cork and Waterford.
  - North Quays – the creation of a vibrant urban quarter on the North Quays will provide a significant boost for Waterford which should be capitalised on from a tourism perspective.
  - Waterford airport – the development of passenger services to the UK/Europe would provide a significant boost to tourism, particularly the short city breaks segment.
  
- **Kilkenny**
  - Berthing facilities for cruise ships at Belview Port (Port of Waterford) would help the area tap into the higher-spending visitor market.
  - Explore the potential to develop Kilkenny’s Medieval Mile Museum as a potential ‘hero site’ within Ireland’s Ancient East.
  - Capital investment in venues such as Woodstock, Castlecomer Demesne, Kells Priory
  - Potential to develop a greenway from Kilkenny.
  
- **Wexford**
  - Rosslare Europort - has enormous opportunities to continue to grow as a hub for major Roll-on Roll-off passenger services from Britain and mainland Europe (cars, buses etc.). The latest figures (2015) show that Rosslare handles 33% of all private passenger vehicles in to the Republic of Ireland (such as cars) and 25% of all passenger buses.

## 7. NORTHERN AND WESTERN REGION - TOURISM POLICY PRIORITIES

Examples of key tourism policy priorities are set out below for the Northern and Western region:

- **Wild Atlantic Way**
  - Further develop this tourism initiative as outlined above to maximise opportunities for the West and North West.
  
- **Ireland's Ancient East**
  - Further develop this tourism initiative as outlined above to maximise opportunities for parts of the North West area, including Leitrim, Cavan and Monaghan.
  
- **Shannon Tourism Corridor**
  - Explore opportunities to develop this future tourism initiative as outlined above to maximise opportunities for the Northern & Western Region.
  
- **Galway**
  - The establishment of a professional Galway Conference Bureau to promote Galway and the West of Ireland as an International Business, Sport and Leisure destination.
  - Explore the potential to construct a world class Convention Centre in Galway city capable of hosting high profile events.
  - Completion of the M6 Galway City Ring Road; completion of an outer bypass circumnavigating the city
  - Explore the feasibility of a light rail system serving the city and its environs, particularly as future development is concentrated to the east of the current city in Ardaun.
  - Development of Park & Ride facilities to alleviate known bottlenecks such as Galway city
  - Significant investment is required in waste water treatment facilities across the county to ensure safe drinking and bathing waters for all.
  - The proposed Galway Harbour Extension should fast-tracked given its importance to tourism and marine leisure activities.
  - Consideration should be given to the establishment of a permanent gallery space in the city which can house exhibitions from associated Museums and Galleries. Galway has such a strong Arts heritage which is often only expressed at festival time.
  - Capital of Culture 2020 – investment is required to ensure that the legacy from this designation impacts positively on the city for decade to come.
  
- **Sligo**
  - Develop the Cork to Sligo road route as part of the national road infrastructure.
  - Completion of the M17 Tuam-Sligo
  
- **Knock Airport:**
  - The development of Ireland West Knock Airport as a low cost tourist access hub with ancillary facilities for access to the Wild Atlantic Way
  
- **Mayo:**
  - Develop a continuous coastal walk linking Mayo's coastal routes
  - Knock Airport, Rail and Bus corridor links.

- Completion of the N5 Westport-Longford
- Improved signage with particular emphasis on access routes to tourism destinations
- **Access to Donegal.**
  - It is essential that the road infrastructure is improved given the lack of a rail link
  - Completion of the motorway to Sligo
  - Motorway to Lifford
  - Support for Donegal and Derry Airports

#### **FURTHER INFORMATION:**

The IHF looks forward to engaging further with the Department of Housing, Planning, Community and Local Government in the development of the National Planning Framework during the coming year. F

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