



Tourism Policy for Ireland

Submission by Limerick Chamber, the largest business member's network in the West of Ireland, to the Department of Transport, Tourism and Sport's Tourism Policy Consultation

November 2013

Executive Summary

Tourism is a key sector contributing to the economic viability of our island economy. Limerick, the largest urban centre along the Atlantic Corridor and international gateway to the West of Ireland via Shannon Airport, is more **dependent economically on Tourism** than other city-region in Ireland (Delaney & MacFeely, 2011). Limerick's Enterprise Tourism Dependency ratio (2009) is 12.6 per cent, while our Employment Tourism Dependency ratio (2009) is 17.9 per cent.

Government are enablers, not directors of tourism. Policies adopted need to provide the necessary regulatory and taxation environment, infrastructure, and research and innovation facilities for the industry to flourish. This has been demonstrated very positively in recent times by the introduction and retention of a reduced VAT rate of 9 per cent for the sector as well as the impact of the abolition of the air travel tax. However, if the sale of **Aer Lingus** is pursued at this time the Irish government are putting the connectivity of Ireland, and this key economic sector, in jeopardy. We therefore call on government to conduct a rigorous and comprehensive analysis assessing the potential impact on the loss of this connectivity.

There is a clear need for government funding to support the marketing of an event/ festival but there is also a needs for defined **exit strategy** to be developed in the absence of market failures, in the context of return on investment and move toward commercial viability. Ex-ante and ex-post evaluation play a key role in driving this model. In addition, more investment and ownership from the private sector needs to be encouraged and developed.

The Local Authority can have a key role to play. While there is a need for a national strategic direction to be adopted, it can be implemented at a local level, from the bottom up. The Local Authority is best positioned to act proactively and be responsive at a local level. However it must be adequately resourced with the specialist skills to provide this service, without generating duplication and within a framework of clearly defined roles and responsibilities.

The knowledge and research expertise emanating from the **National Centre for Tourism Policy Studies**, located at the University of Limerick, needs to be utilised to enhance collaboration and explore research methods to enhance greater levels of innovation for the tourism sector.

Reinforcing innovation and fostering skills is core to tourism success. To allow this focus from the support agencies, the responsibility for training should be transferred to training providers, such as the **Skillnet network**, who deliver customised, enterprise-led training suitable to the needs of the individual organisation and sector.

Ireland has yet to adopt the internationally recognised standard accounting framework as applied by the OECD, WTO and EUROSTAT: a **Tourism Satellite Account**. If the Irish government is serious about adopting a policy framework to support this sector it must, at the very least, adopt an internationally recognised methodology of accounting for the contribution of the sector to the economic health of the country.

From an agency perspective, there appears to be **duplication and overlap** between the roles of Fáilte Ireland, Tourism Ireland and Northern Ireland Tourist Board. They have similar roles but focus on differing target markets. This must be eradicated to deliver a value for money service for the exchequer.

Ireland has traditionally adopted a demand-led '**Keynesian**' model dictated by an emphasis on promotion. There is a progressive move away from promotion to creation of 'frameworks' that foster competitiveness. Ireland has an innovative weakness in the tourism sector and government have, to date, failed to drive innovation. Internationally \$1 trillion is generated through tourism receipts. The profile of tourism has changed and Ireland's policies must change to reflect this, with more supply side interventions needed to deliver this.

Introduction

Limerick Chamber welcome this consultation process and congratulate government on initiating a debate on identifying innovative approaches, partnerships and priorities which can support and enhance the revenue generated by the tourism sector, during this current economic period of constrained fiscal resources, and beyond. We also wish to acknowledge and thank government for the initiative they have shown and the decisions they recently made regarding the retention of a 9 per cent VAT rate for the hospitality sector in conjunction with the decision to abolish the air travel tax.

Additionally, on behalf of the business community in Limerick we want to acknowledge government commitment to our city-region through a range of policy decisions they have recently adopted – granting independence to Shannon Airport, committed investment to the Wild Atlantic Way and the appointment of Limerick as Ireland’s National City of Culture in 2014 – which cumulatively have and will continue to, enhance and support not just the tourism sector, but the wider business community.

As the largest business representative body in the Mid-West region Limerick Chamber has an inherent interest in the preparation of an innovative and effective national Tourism policy. Shannon Airport is a strategic infrastructural asset and economic driver for the Mid-West region, Atlantic Corridor and metropolitan Limerick city-region as identified in strategic spatial and development strategies including the National Spatial Strategy, the Mid-West Regional Planning Guidelines, The (draft) Limerick City Economic Spatial master plan, the Clare County Development Plan and the Shannon Town Plan. There is a high level of interdependence and correlation between Aviation Policy and Tourism Policy and we urge government to adopt an integrated approach to the development and adoption of policy decisions in both areas.

Contained in this submission are the views of Limerick Chamber, representing businesses of all sizes, across all sectors in the greater Limerick area. The primary focus of this submission is on the national strategic importance of maximising returns on investment by government in supporting economic growth and employment in the tourism sector.

The Chamber proposes to make observations and comments for consideration by the government in drafting the tourism policy under the following headings:

- 1. Aviation and Tourism**
- 2. Tourism Marketing**
- 3. Tourism Product Development**
- 4. Human Resources & Training/ Enterprise Supports/ Innovation and Competitiveness**
- 5. Policy and Service Delivery Mechanisms**
- 6. Additional Recommendations**

Aviation and Tourism

Government must be mindful that Ireland is an island economy on the periphery of Europe. A cause of concern on the part of businesses in the greater Limerick region and along the entire Western seaboard is government's commitment to the sale of its share in Aer Lingus. Hub connectivity is a key pre-requisite for the success of industry including the tourism sector.

If the sale of Aer Lingus is pursued at this time the Irish government are putting the connectivity of Ireland, and this key economic sector, in jeopardy. We therefore call on government to conduct a rigorous and comprehensive analysis assessing the potential impact on the loss of this connectivity. If this evidence based research finds that **market failure exists** i.e. that this connectivity will be transferred to other routes were Aer Lingus taken over by any international carrier, then government intervention is not only justified but required, and the sale of Aer Lingus must be reviewed.

Limerick Chamber reiterates the recommendation of Forfás (April 2013) that **“should the State share of Aer Lingus be sold, maintaining and developing competition, and expanding the network of routes should be a key criterion in the sale process”**.

Tourism Marketing

- There is scope for greater co-operation and **collaboration** between the public and private sector.
- With current mobile phone technologies the **marginal cost** of marketing an additional bed night/ visitor to or within our country is **effectively zero**; there is a need for greater utilisation of mobile technology applications to clearly market a distinct message to both our overseas and within-Ireland visitors. However, this cannot replace the pivotal role face to face interactions play.
- While there is a role for national strategies, **regional differentiation** should be respected ;
 - A model of regional differentiation is best delivered through an **adequately resourced**, bottom-up approach, to market a cohesive and clear brand and message;
 - This approach can **leverage** in a more co-ordinated manner **private sector investment** and monies.
- While there is a need for government funding to support the marketing of an event/ festival, there needs to be a **defined exit strategy** developed in the context of return on investment and move toward commercial viability. The Edinburgh Fringe Festival is an example of high impact return for a comparatively low government investment. Gardner (2005) **advises that exit strategies**, when planned with partners in advance of close-out, ensure better program outcomes and encourage commitment to program sustainability. Three basic approaches to Exit Strategies are outlined below:

The first, *phasing down* is a gradual reduction of program activities, utilizing local organisations to sustain program benefits while the original sponsor (or implementing agency or donor) deploys fewer resources. Phasing down is often a preliminary stage to phasing over and/or phasing out;

The second, *phasing out*, refers to a sponsor's withdrawal of involvement in a program without turning it over to another institution for continued implementation;

The third type of Exit Strategy approach is *phasing over*, a case in which the sponsor transfers program activities to local institutions or communities (Gardner, 2005).

- Within the context of the Limerick city region, the **North American Market** must remain a strong focus of marketing activities, leveraging the unique asset of frequency of services at Shannon Airport in addition to Customs and Border Pre-clearance facilities available. This is particularly true with the recently announced investment in the **Wild Atlantic Way**.
 - The designation of Shannon as Irelands **Transatlantic Airport** would greatly complement the Wild Atlantic Way offering.
- Ireland's decision to opt-out of the **Schengen Area** leaves us at a disadvantage relative to our European neighbours. While the measures which will enable Ireland to meet the Schengen requirements remain in the remit of the Minister for Justice, such policy decisions potentially impact on tourism outputs for the exchequer.

- To realise the potential return on emerging markets, such as Russia and China Ireland's **visa processes** and protocols need to be overhauled to allow a more customer friendly experience.

Tourism Product Development

Limerick Regional Differentiation – A local context

The Limerick region is unique both nationally & internationally; located at the heart of the Atlantic Corridor with an international airport and a unique history of innovation in tourism, from the creation of Aer Rianta International, to the internationally renowned visitor experience at Bunratty Castle, to brand 'Munster Rugby' and the fortress of Thomond Park, to the recently renovated King John's Castle to name but a few. Limerick is home to a large range of high quality, competitively priced tourist accommodation, including many nationally acclaimed award winners.

Tourism plays a vital role in supporting the economic health for Limerick: the 'restaurant and accommodation' industry alone employs over 8,000 people throughout the Mid-West region (CSO, 2011). Independent economic analysis found that a Heineken Cup quarter final rugby match held in Thomond Park generated €10.5 million for the Limerick economy (BDO Simpon Xavier, 2009). The report highlights the critical co-dependence of the tourism sector on sport and events, something which Limerick Chamber feels greater focus needs to be placed on in future policies.

The potential product development in the cruise industry seems to be evading the Shannon Estuary and needs full support. The European cruise industry continues to increase its share of the global cruise market with 27.8 million passengers visiting a European port in 2011; 5.6 million passengers joined their cruise in Europe in the same year with the industry generating €36.7 billion of goods and services and providing more than 300,000 jobs (European Cruise Council). 85 cruise vessels are scheduled to dock in Dublin in 2013/2014 (Dublin Port, 2013) with 62 scheduled in Cork (Afloat.ie); 10 top-line cruise vessels were scheduled to dock in Galway in 2012 (Advertiser, 2012) and 5 in Foynes in Limerick 2011.

National Policy Context

- Greater supports to providers of tourism services to embrace innovative approaches must be embedded in national policy.
- Greater **emphasis on research** and alignment between research centres, higher education intuitions and the industry must be adopted. In this regard the **National Centre for Tourism Policy Studies** needs to be utilised to enhance collaboration and knowledge sharing between research institutes, to drive and deliver greater levels of innovation for the tourism sector.
- There is potential also to develop **Educational tourism** – a program in which participants travel to a location as a group with the primary purpose of engaging in a learning experience directly related to the location
 - The size of the world market for international education travel is estimated to have increased from 4.8 million trips in 1985 to almost 8 million trips in 1996; this figure represents more than a 66% increase (Ankomah & Larson, 2010).
- There is potential to generate greater use out of existing products by adopting more innovative approaches of inclusion – these include in particular, **GAA & Irish Music**. For

example, package and St. Patricks Day parade in conjunction with the GAA senior club championship finals which take place in Croke Park on that day, this is a unique and exciting atmosphere that overseas visitors would enjoy.

- In many instances, the product is good but it lacks the collective and coordinated marketing needed to differentiate and identify the experience.
- Ireland (including Limerick, particularly) needs to place greater emphasis on attracting international **sporting events** – leveraging support from the private sector, such as for example, the American Football match which was held in Dublin, Rugby League which is being held in Thomond Park.
 - Sports tourism in Australia represents approximately 5% of the overall tourism market, equating to tourism expenditure of about \$3 billion per annum (Commonwealth Department of Industry, Science and Resources, 2000)
 - Emerging economies recognise the impact major sporting events can have on attracting investments to their countries, while the developed world is not so enthused. An international survey reveals the extent to which developing economies place greater importance on major sporting events in attracting inward investment. In Latin America, almost three quarters (74%) of business leaders believe major sporting events are important in attracting investment to their economy, and across the BRIC nations over half (54%) hold this view (Grant Thornton, 2012).
 - Ireland needs to place greater emphasis on this emerging trend, specifically; there are untapped opportunities to attract more second tier European sporting events.
- The **Local Authority** can have a **key role** to play in developing and delivering tourism products:
 - While there is a need for a **national strategic direction** to be adopted, it can be implemented at a local level, from the **bottom up**. This model has proved successful in the execution of 'The Gathering';
 - The Local Authority also has a vested interest in promoting its Municipal District as the tourism sector is not only key contributors through **commercial rates**, but also play a pivotal role in making a city region an attractive and living destination;
 - As authors of **development plans** as well as influencers of regional area strategic plans, the local authority plays a key role in **aligning policies** at a local and regional level. However, if Local Authorities are to be tasked with playing a more pro-active role in tourism product development they must be given the adequate resources to deliver this in a manner that facilitates **streamlining**, not duplication of existing services.
- The Gathering showed evidence of success and should be repeated. Ireland should closely monitor developments in Scotland as they roll out the repeat of their initiative and learn from their experiences. Limerick Chamber suggests a repeat should be incorporated into a **local authority's** tourism plans.
- Community activation could be achieved via models adopted in the UK, such as the National Trust where members host visitors at attractions.
- Personal contact at physically manned tourist offices must continue to play a key role in the provision of tourist information when visitors arrive to a destination. However information kiosks could be used to augment this basic service, as improved mobile device technology

interactions replace much of the traditional functions. There is a need for Ireland to embrace this model through information kiosks.

- Ireland's **taxi service** is often an overseas tourist's first impression and there is a need for enhanced standards in our provisions of this service versus international models such as the 'yellow' or 'black' cabs in New York and London. The new HAILO system is an efficient means of service provision available in our cities and is a good example of how mobile devices can be utilised to improve service provision and safety.

Human Resources & Training/ Enterprise Supports/ Innovation and Competitiveness

Training

- Reinforcing innovation and fostering skills is core to the tourism policy's success. The **responsibility for training** in this sector would benefit from a more dedicated training support such as the Skillnet Network. Transferring the role of training to a dedicated resource which can deliver customised training which is enterprise led to meet specific business and sector needs will allow the focus of the tourism support agencies on their core activity of tourism product development and marketing.
- **Training** needs to be developed past Levels One, Two and Three and more training offered from Level Four onward to offer a career progression path and develop skills past supervisory training onward.
 - A minimum nominal cost must be associated with this training, the current 'no cost' model is not providing the necessary incentive for those who sign-up to attend.
- An '**Apprenticeship**' type model, such as that which is successfully utilised in the training of chefs, could be rolled-out across the 'accommodation and food' industry. This will have a particularly positive impact on **activating employment**, particularly with the under 25's.
- The importance of employer engagement and the value of hands-on experience via varying strategies are highlighted by Robinson (2009) who offers some valuable discussion regarding how the reputation of the UK tourism industry has suffered from a lack of professionalism; Ireland must learn from these experiences and ensure co-operative policies are adopted by our tourism sector.

Innovation

- While the Limerick region has a variety of strengths focus on **innovation** is recognised as a priority. Limerick City and County Council has established a "Limerick Innovation Hub" in order to develop a dynamic innovation eco system aimed at accelerating job creation, 2nd stage incubation, clusters, and partnerships via open collaboration and driven by programmes and events (Daly, 2013).
- The aforementioned **National Centre for Tourism Policy Studies** and the Innovation Hub could link well to collaborate on tourism research and link with innovation efforts in an effective manner in order to support enterprise and job creation.
- In parallel, further innovative efforts are driven by the provision of a new model of local government; Limerick have the first local authority to draft an Economic and Spatial Plan *Limerick 2030*; Limerick has an independent airport management structure which is delivering increases in passenger numbers and routes; Limerick has a 'Charter of Convergence and Cohesion' signed by the principal agencies in the Mid-West region, which sets out a series of commitments which at the centre contains a resolution to working in a collaborative way for the benefit of Limerick. Limerick has the ability to drive and a

revitalised and reinvigorated tourism policy for Ireland; our appointment as Ireland's first City of Culture in 2014 is testament to this.

Competitiveness

Competitiveness is pre-requisite for the tourism sector. There are several policy areas which, although do not directly fall under the auspices of the DTTS, could/are having a disproportionately negative impact on the tourism sector by eroding their competitiveness, specifically:

- **Infrastructure** plays a key role in connecting international and national tourists to our cities and regions; with regional tourism playing a vital role in supporting Ireland's economic vitality, our **road and rail** infrastructure must allow ease of movement.
- Ireland's national **broadband** strategy must be rolled out to allow tourism operators to better engage with customers and create new business opportunities.
- Limerick Chamber fully supports the maintenance of minimum wage legislation; however we seek to ensure that additional premiums payment reflect the nature of the businesses as well as the financial implications on the business and urge that this be reflected in decisions by the **Joint Labour Committees (JLCs)**;
- **Water charges** vary across the country depending on the local authority in which the business is located. There is a need for greater clarity as to how these rates is set. Water must be priced in a way which is competitive with other regions. This is particularly relevant for those in the accommodation and food industries who are high volume users of this service;
- Limerick Chamber seeks that government enshrine greater competition in the provision of **utility services**, i.e. gas and electricity;
- Finally, policies must be adopted to encourage **international insurance houses** into the Irish market to drive greater competition.

Policy and Service Delivery Mechanisms

Government involvement in Ireland's tourism model is uniquely centralised and statist. A model which **embraces greater local and community** involvement will assure a higher quality tourist experience and will directly lead to an increase in repeat visits, an area where Ireland scores comparatively low at the moment. If Ireland had the same percentage of repeat visitors as Scotland we would double our number of tourists (Casey & O'Rourke, 2013).

Higher levels of ex-ante and ex-post evaluations of investment must occur; return on investment must be a key focus of investment decisions. Tourism Scotland 2020 stresses that performance evaluation via the gathering and acting upon visitor satisfaction information as a major focus for the industry at all levels: national, destination and business. Mechanisms have been put in place to ensure information is collected on a comprehensive and consistent basis in line with the visitor experience and customer journey themes of the strategy. International competitor destinations are integrating their efforts across their respective industries to offer experiences that are tailored to visitors' personal interests. Focus should not be directed too intently on the individual businesses and products, but more on customers' overall experiences (Alliance, 2012).

There is a duplication and overlap between the roles of Fáilte Ireland, Tourism Ireland and Northern Ireland Tourist Board. They appear to do a similar job but focus on differing and segmented target markets. This duplication needs to be eradicated and efficiencies need to be driven in the context of the provision of a value for money service for the exchequer.

The Shannon Region Conference & Sports Bureau has been a public private partnership tourism support model focused on attracting events and conferences into Ireland's Shannon Region. We mention this here only to highlight the success of the model and using this as an example of how partnerships can deliver higher returns on investment than purely public mechanisms.

Additional Recommendations

As identified in the consultation document the tourism sector is a key contributor to Ireland's economy. However Ireland has not adopted the internationally recognised standard national accounting framework as applied by the OECD, WTO and EUROSTAT: a **Tourism Satellite Account**. If the Irish government is serious about adopting a policy framework to support this sector it must, at the very least, adopt an internationally recognised methodology of accounting for the contribution of the sector to the economic health of the country.

Aligned to best practice cluster development it is notable that the "Tourism Scotland Strategy 2020" was developed and led by the industry under the umbrella of the Scottish Tourism Alliance and supported by the public sector (Cluster Observatory, 2013). The strategy also notably positions the customer centrally within the policy and breaks down into several key focus area with the aim of growing the markets and playing to their strengths by developing their strongest assets. Their overarching strategy is geared growing their markets by developing their near neighbours, their home turf, their distant cousins and emerging markets. The strategy to achieve this is by providing authentic experiences (*Nature/Heritage/Activities, Events/Festivals, Destination Towns/Cities, Business Tourism*), improving the customer journey experience (*Transport, Food/Drink, Accommodation and Digital Connectivity*), build the industries capabilities (*Quality/skills, Sustainable Tourism and Marketing*) and also its leadership and collaboration (Alliance, 2012).

The structure of the Irish policy efforts, while broken into sections, does not appear to place the customer centrally and is also not industry led. While the consultation process is to be commended a migration to more industry ownership in the sector is a key factor to the future industry development.

Conclusion

Ireland is unique. We have a unique tourism product and we are uniquely located as an island economy on the periphery of Europe. Government policies, as enablers, must provide services to support our tourism industry, working with the private sector, to drive and deliver an efficient, effective model. Additionally, Ireland's tourism policy must take into account and reflect the wider policy context, particularly in relation to connectivity and competition. An interesting and worthwhile model to examine is Tourism 2020 in Australia, a partnership strategy adopted by government and industry to drive growth and realise potential (2011). In addition, government funding to support requires defined exit strategies developed in the context of return on investment as they move toward commercial viability.

Research supports must be embedded in policy to drive greater levels of innovation from both within the public and private sectors and the National Centre for Tourism Policy Studies should be utilised to its full potential.

There is potential to generate greater use out of existing products by adopting more innovative approaches of inclusion – these include in particular, GAA & Irish Music. The North American Market must remain a strong. There is also potential to develop Educational tourism and greater emphasis needs to be placed on attracting international sporting events. Limerick as City of Culture 2014 affords the opportunity to showcase the Limerick as a destination of choice. The potential product development in the cruise industry seems to be evading the Shannon Estuary with the least number of liners docking and support to develop this as a product is required.

The responsibility for training in this sector would benefit from a more dedicated support such as the Skillnet network which is designed to provide customised training which is enterprise led and provides value for money.

From an agency perspective, any overlap between the roles and functions of the current entities must be streamlined and any duplication abolished.

While the Limerick region has a variety of strengths, focus on innovation is recognised as a priority. The establishment of a "Limerick Innovation Hub" and a new model of local government will add focus and improve aligned efforts to collaborate and improve competitiveness.

Performance evaluation via the gathering and acting upon visitor satisfaction information is a strong requirement. Aligned to best practice cluster development, position the customer centrally within the policy with the aim of growing the markets and playing to the strengths by developing the strongest assets.

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