Comhairle Cathrach
Bhaile Átha Cliath
Dublin City Council

Evolution of the Dublin Place Brand – Update for SPC – 12th April

The objectives of this project

- Understand how the brand could and should evolve for the new market conditions
- Develop a model for measuring brand efficacy and KPIs
- Develop a new governance model for place brand management to enhance adoption and visibility
- To provide a new narrative for Dublin that will resonate with all target audiences – Residents, Visitors, Investors, Local Enterprise and Students

The activities we're undertaking

Update on market dynamics

Reviewing best practice

Perceptions research

Benchmarking performance

Developing a new place narrative and positioning

Developing new guidelines for brand management

Creative inputs

Comms planning

Why place brands and marketing matters – the new market dynamics

INVEST

- Access to skills – decentralisation of projects
- Rise of ESG
- Need for stability
- Profitability
- Direct engagement with cities to retain control – national bodies of less significance

WORK

- Access to skills
- Changing financing models
- Need to scale more quickly and exploit new modes of funding
- Managing the new working norms
- Managing risk

VISIT

- Volumes and patterns have changed
- Local cultural interest
- Sustainable tourism
- Security
- Authenticity
- Skills drain due to Covid

LIVE

- Higher expectations from residents
- Vitality and vibrancy
- Access to cultural experiences
- Quality accommodation
- Integrated transport systems
- Community, diversity and inclusion

STUDY

- Move to hybrid and online teaching
- Place + Institution + Course
- Cost
- Employability and opportunity
- Access and facilitation for international students

How place positioning and marketing helps?

INVEST

- Building mindshare and messaging on Dublin as a leading FDI location highlighting sector expertise.
- Promoting city attractiveness to support skills retention
- Promotion to potential investors
- Complementing the national offer and their increased focus on placemaking

WORK

- Scaling enterprises have increased location choice – especially with hybrid / tech / regionalisation agendas but Dublin remains economic engine and largest market in Ireland
- Building enterprise base to reduce FDI dependence

VISIT

- Messaging in line with new consumer demand
- Change perceptions od Dublin domestically and enhance leisure and business travel
- Support Tourism Ireland's international marketing efforts
- Leverage the wider Dublin product

LIVE

- Develop a sense of pride and confidence with residents
- Encourage participation in more aspects of city living across all groups – culture, sport, health & wellbeing
- Promote the quality of life available in Dublin

STUDY

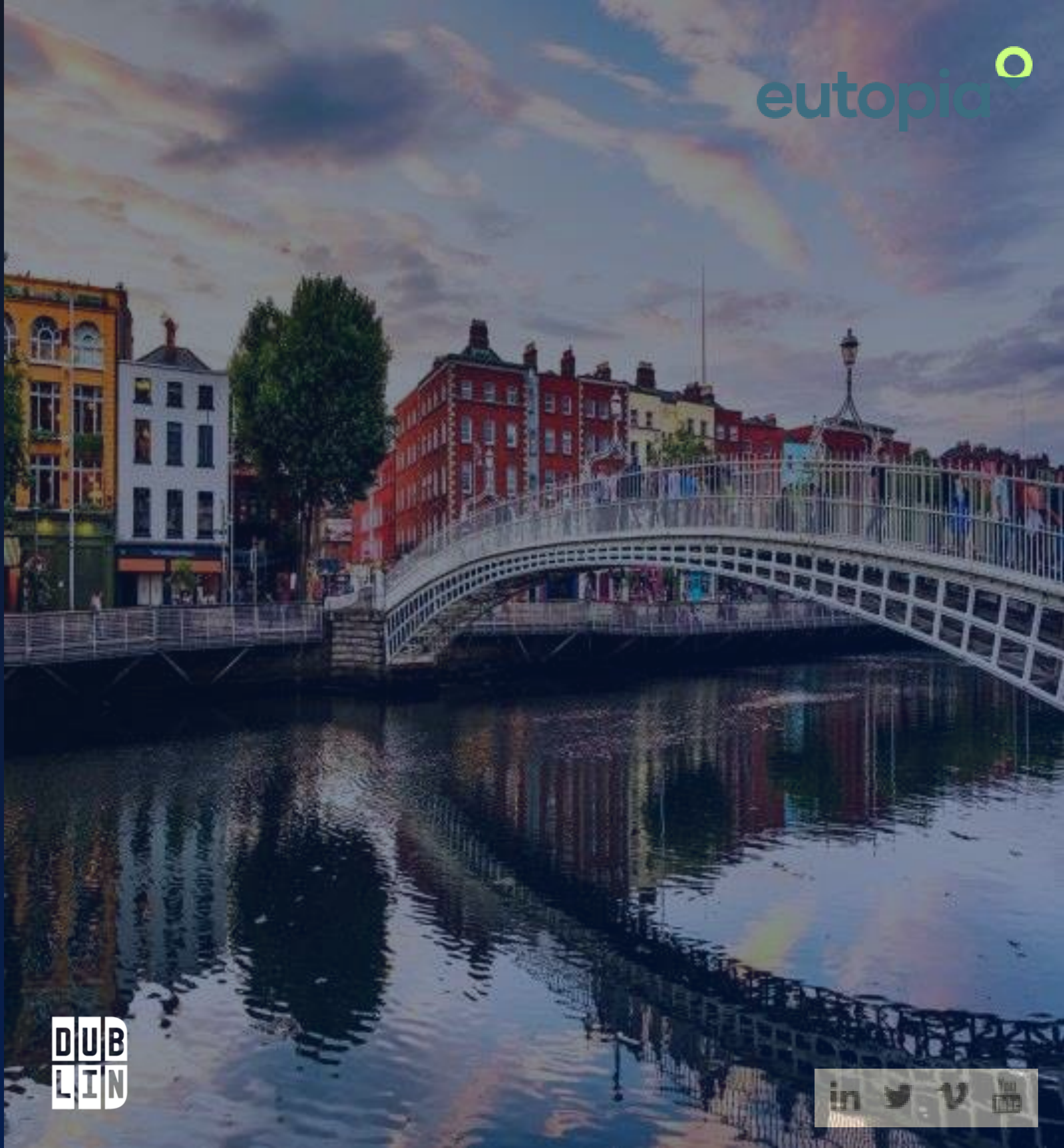
- Place remains a primary ingredient of the student decision making process – domestically and internationally
- International students become ambassadors and can supplement the skills pool

Tier 1 – Key urban hubs across the island of Ireland that have adopted place brands

Visual Identity considerations

- Place names are already brands and communicate certain values
- The creative device provides an opportunity for standout, adoption, direction and campaign integration
- Colours derive from literal translation, County colours, “Irish” colours
- Belfast has no fixed colour (political!)
- To add a tagline or brand driver or not? Needed if brandmark doesn’t use the name explicitly
- Brand drivers support the overall narrative and campaigns

EUROPEAN CITIES AND THEIR APPROACH



City Brands in Action – MIPIM 2022
Back in business theme

Many city brands conveyed
"post pandemic" messaging

City Brands in Action – MIPIM 2022
Lifestyle drivers

“Liveability” has become a more important positioning post pandemic with the resulting rise in hybrid working as cities compete against regions for talent.

City Brands in Action – MIPIM 2022
Environmental focus

Unsurprisingly, many cities have an environmental positioning and significant focus on ESG within the MIPIM conference programme.

City Brands in Action – MIPIM 2022
European focus

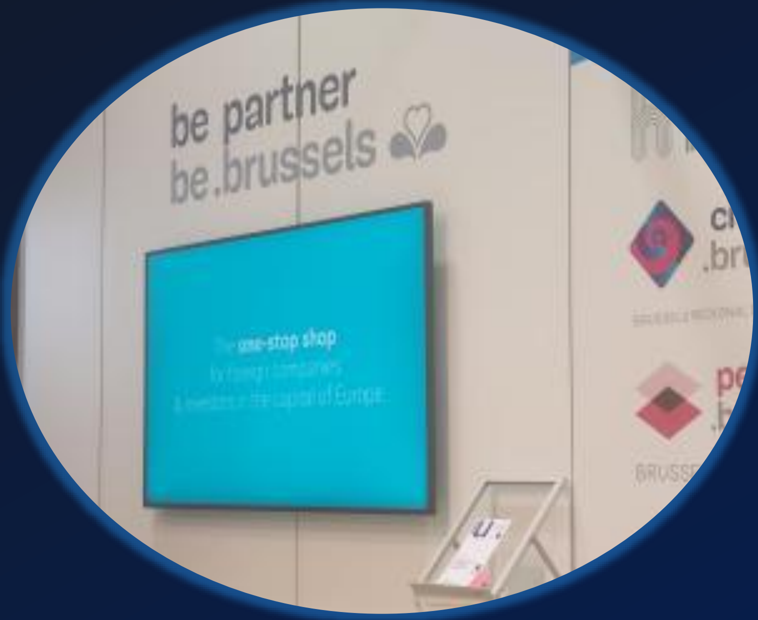
Strasbourg has a clear and owned position as a European hub – evidenced by the location of the European parliament.

City Brands in Action – MIPIM 2022
New look and feel and positioning for established brands

London's brand device indicates multi-culturalism and diversity

Stockholm's campaign at MIPIM centred around IMPACT – an economic centred positioning.

City Brands in Action – MIPIM 2022
Less of the traditional investment focus

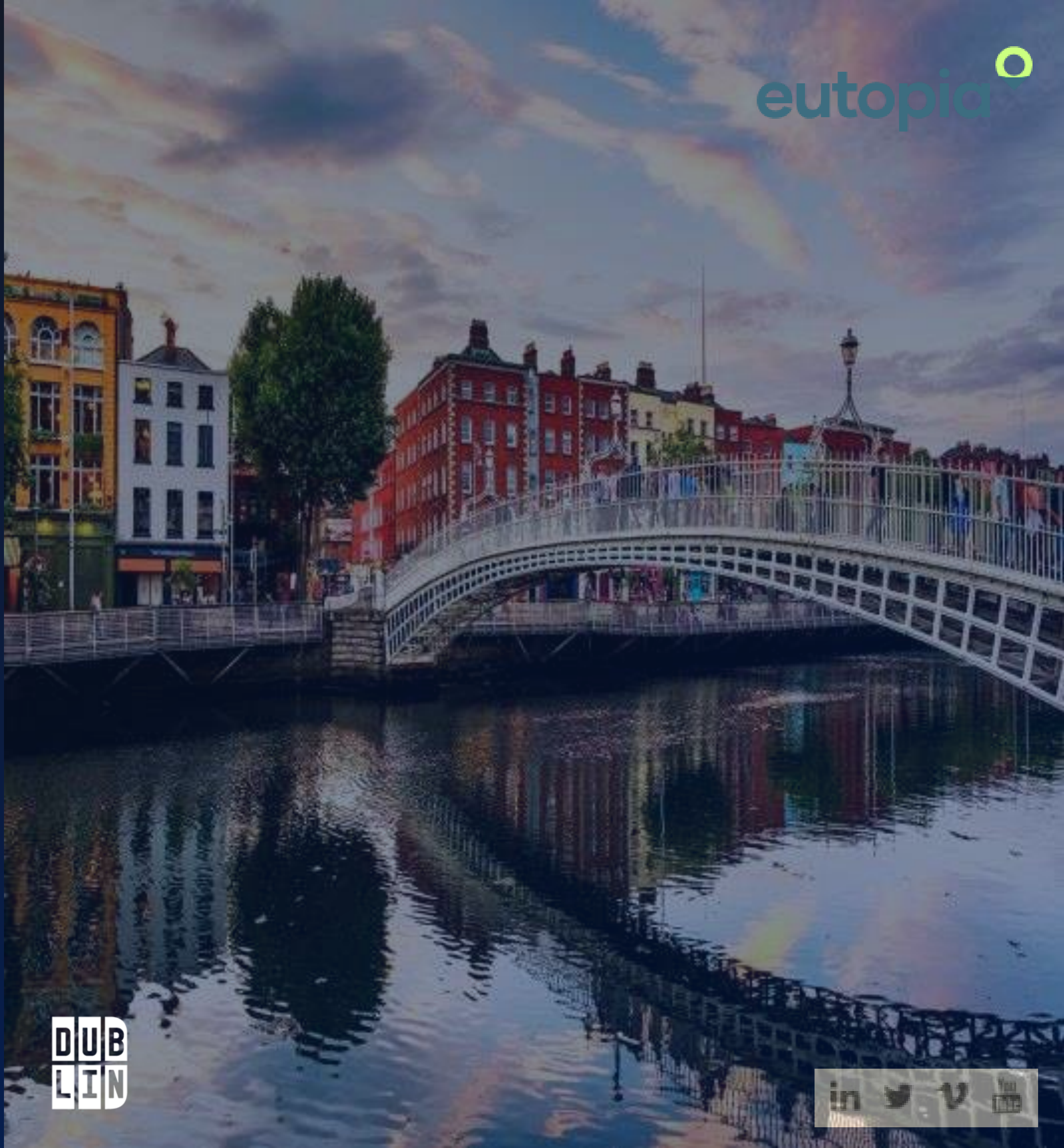


Less cities lead with "economic" focussed brands recognising the broader interdependence of place pillars

Best Practice examples

- Prominent European place brands include Lyon, Eindhoven, Stockholm and Antwerp
- Theses cities have dedicated “place” websites and actively managed social channels. The brand is used across the pillar areas including tourism
- The brands are also highly visible at a local level – and fully adopted by respective municipalities
- There is evidence of widespread engagement and adoption by multiple stakeholders.

Some initial findings



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DUBLIN

eutopia

OCO

To better understand Dublin's perception, the place opportunities and challenges, OCO and eutopia engaged senior stakeholders at local, national and international levels to provide further context for the evolution of the place brand. In total, 60+ consultations have been completed with contributions from organisations involved with the following activities: enterprise, transport, housing, tourism, higher education, investment, sport, and culture.

LOCAL

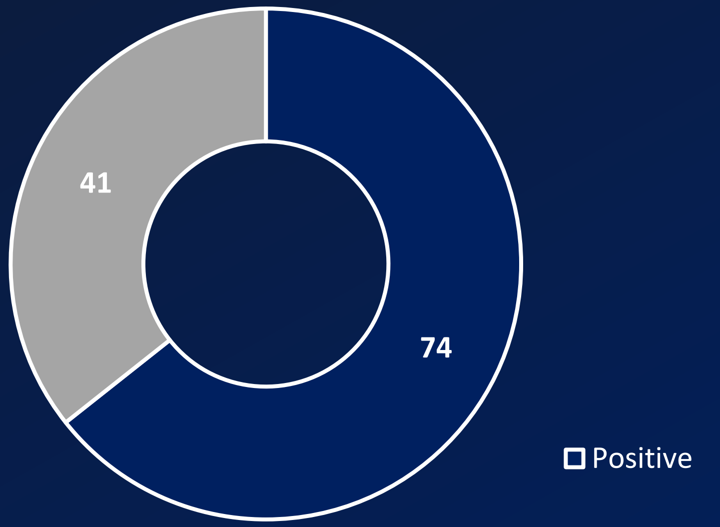
NATIONAL

INTERNATIONAL

Economic perceptions (Macro, investment & enterprise)

- This pillar covers stakeholder comments and concerns surrounding skills, remote working, enterprise and investment attractiveness among others.

	Analysis
Challenges	• Many uncertainties remain around the future of work and its impact on city centre development. • Skills shortages which acute in some areas - regionalisation / remote working may impact • Concerns that Dublin will see less investment in the future in part due to changing patterns of investment and potential regulatory changes in international taxation • Regional / domestic perception that Dublin needs less intervention and support • Brexit, inflation, post Covid recovery and other macro issues • Limitations as to the relative resource of LEO
Opportunities	• Dublin is recognised as the main source of economic opportunity in Ireland • Remote working also mobilises skills from other regions – 2 way street • Strengthening enterprise sector, particularly tech • Dublin as the only English speaking city within the EU could bolster FDI • Property development and demand remains buoyant
Current Initiatives to support growth	• Local Economic Development plan • EMRA Strategy • Dublin-Belfast Economic corridor • Digital transformation initiatives from public and private sector • SMART cities / Innovation agenda to harness and manage the tech impact on workforce • Business growth supports from LEO & FDI attraction from IDA
Brand and positioning	Attractiveness and enhanced experience of working in an office based city environment. The unique opportunity in Dublin for career development Strength, opportunity and confidence



Economic perceptions – Hybrid working

- Hybrid / remote working is seen as a significant concern – but also an opportunity to attract new skills
- There was general uncertainty surrounding the future of work and how hybrid working would affect businesses' abilities to employ new staff and what the impact will be on operational effectiveness
- Stakeholders were concerned about the perceived impact on Dublin city centre, believing that people are now reluctant to return to the city to work
- This move away from city working if sustained could have a long term detrimental effect on the city's economy
- The reality is that the market will adjust and a balance will be achieved. Demographics may be a factor.

Missed out on human interaction; remote-working worked in the short-term but not suitable for new staff, training, recruiting. Expect migration back to office

Seen a change in clients moving out of Dublin city centre due to declined footfall, growing in suburban Dublin. They'll either relocate back in, or new businesses will fill the space

Know companies reducing office space and others expanding space and using it differently (creating better office environment) to attract talent .

Know people who took Dublin-based jobs they wouldn't have considered, because they can work remotely

If workforce won't return to office, companies may have to remain remote to retain employees

Economic perceptions – Other key points

DUBLIN RECOGNISED AS ECONOMIC HUB

- Scale and momentum
- Buoyant jobs market, good growth indicators
- Centre for business on island of Ireland and of growing European importance post Brexit
- "If it isn't happening in Dublin, it isn't happening for our business"
- Economic hub and spoke effect for Ireland

REGIONALISATION & COMPETITION

- Regions have experienced a remote working boost and provides an opportunity but driven by individual needs rather than business needs – even with the predicted decentralisation in FDI
- A spirit of co-opetition rather than competition and respect for Dublin's position
- The cost and standard of living appear to be the main factors motivating workers to consider remote working roles
- Other key urban hubs like Belfast and Cork need to support the city working narrative as much as Dublin
- There may be more opportunities to work together on regional corridors like Belfast / Dublin Economic Corridor

Associations with Dublin from international consultees

- Dynamism
- Technology Centre
- Tax Incentives
- Expensive Cost of Living
- Urban Regeneration

- Pub Culture
- Irish Hospitality
- Whiskey Distillery Tours
- Guinness Tour
- Landscapes and Surrounding Countryside
- Cultural Heritage

- Financial Services
- Trinity College (Higher Education)

- Guinness
- River Liffey
- Beautiful architecture
- Temple Bar
- Literature

- Economic 'Rebound'
- Major Technology Hub in Europe
- Corporate Hub for Global Companies
- Vibrant and Diverse Talent Base
- Young and Dynamic Economy
- Tax Incentives

- St Patrick's Day
- Pub Culture
- Temple Bar District
- Culture, Music and Dance
- Walkable city and accessibility
- Guinness tours
- 'Heart of Ireland'

- Innovation Economy
- Financial Services
- Tax Incentives

- St Patrick's Day
- Whiskey and Guinness
- Georgian Architecture
- Literature
- Temple Bar

Dublin’s Peer Cities

			
London	*Strasbourg*	*Edinburgh*	*Birmingham*
Berlin	*Vienna*	*Amsterdam*	*Belfast*
Zurich	*Prague*	*Barcelona*	*Copenhagen*
Amsterdam	*Amsterdam*	*Glasgow*	*Edinburgh*
Barcelona	*Frankfurt*	*Cardiff*	*Amsterdam*
Singapore	*Manchester*	*Newcastle*	
Cologne		*Copenhagen*	
Lille		*Oslo*	
Madrid		*Helsinki*	
Lisbon		*Lisbon*	
Stockholm		*Hamburg*	
Gdansk		*Lyons*	
Glasgow		*Cologne*	
Antwerp		*Belfast*	
Liverpool		*London*	
Hamburg		*Boston*	
Marseille		*Berlin*	
Munich		*Nantes*	
		Brussels	
		Seattle	
		Zurich	
		New Orleans	

“I view Dublin as another weekend break destination with decent nightlife”
Ian Fuller– OCO Global

“Dublin is not a mega city but is able to stand strongly on its own as a tourist destination and hub for business/industry.”
Brian Castleberry – Maryland Department of Commerce

“Great city with rich history but not as prohibitively expensive or overdone for travel as London, Paris, etc.”
Preston Wickersham – Remote Technologies Ltd

“Second Tier City”
Thelie Reichard – The Co-Active Network

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Three Words to Describe Dublin

Friendly

10%

Historic

8%

Fun

5%

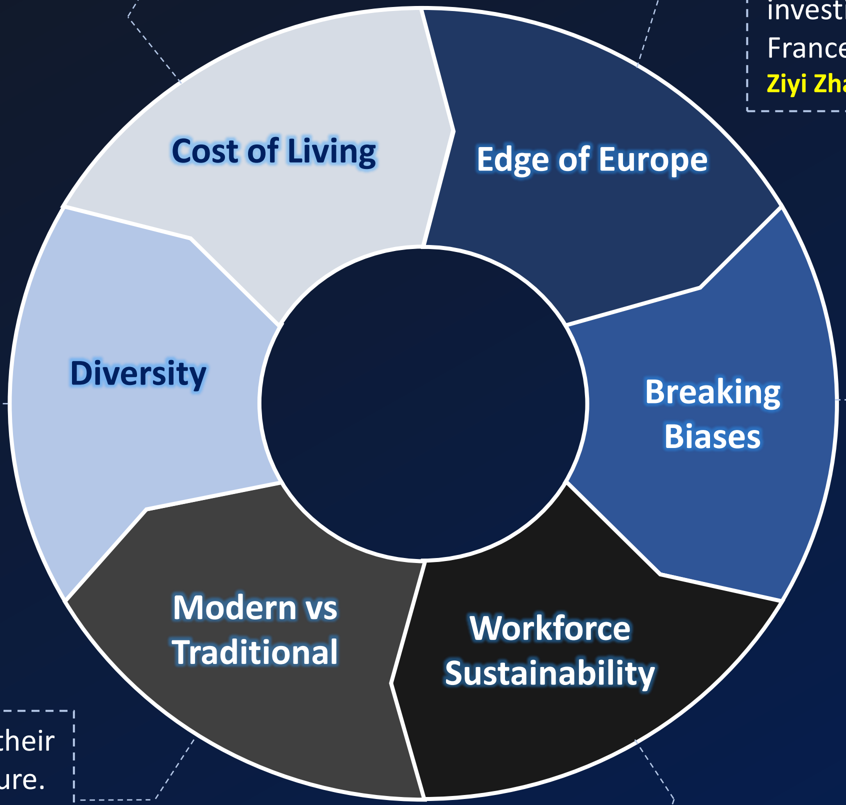
Challenges for Dublin

Several key threats and challenges were identified for Dublin from international consultees.

"Rising costs in city represents a challenge, esp. for students and junior staff of companies"
Jens Manke - Germany

"Dublin is not the tier-1 investment destination for Chinese investors compared to Germany or France when considering investing in Europe. Reasons for choosing Germany or France can be boiled down to geographic location"
Ziyi Zhao – China

"The most negative perception is the lack of diversity. Very little minority representation in Dublin. This could be a major challenge in the future."
Andy Karellas – USA



"One of the challenges is that the city seems to be second tier, rather than a first-tier city. I have never naturally thought of Dublin as a city that is in line with the first tier cities throughout Europe. This could be a major challenge economically and attracting tourists"
Thalia Reichard – Canada

"Staying innovative and balancing their traditions/historical value with the future.
Barry O'Connell - USA

"Sustainability could be a challenge – do they have the population growth to support large companies"
Alan Stevenson – USA

Perception of Dublin – Cross-pillar topics

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ROLE OF MEDIA

Consultees commented that Dublin received a disproportionate amount of negative media coverage – both on traditional media and social media – which resulted in a negative perception of the city overall.

"Feels like it is common to talk down Ireland, talk up negative aspects - particularly among younger people and on social media"

"Media highlights only bad news"

"Social media needs to be regulated, lot of misinformation and damaging material; decline in quality of journalism"

"Problems of the city exacerbated by media; if someone gets assaulted on the Luas, it will be on national news. City of half a million people, a million use it as their base - these problems happen anywhere of that size"

"Crime stats don't back up the messaging around safety"

GOVERNANCE

There is a perception that Dublin's governance is often disjointed. There is a willingness to collaborate but often operational challenges in doing so with surrounding areas in the County. There are calls for greater collaboration and integration, both across regions and between the public and private sector, and particularly on issues surrounding green initiatives.

"Dublin had 42 EU-related projects, but no sense of having an EU function or EU relationship"

"Dublin stakeholder market is fragmented compared to smaller entities like Cork. Each area of government has competing priorities"

"Targeting international markets could be more joined up across agencies & strategic priorities e.g. EI, Tourism etc. 5000 Indian students in Ireland, probably 2/3rds in Dublin; Dublin City aren't going to promote themselves in India"

POLICY & STRATEGY

Some consultees commented on the lack of authority and capacity of Local Authorities as well as the marginalisation of urban areas as part of the regionalisation agenda.

"Need for a national policy for cities the way there is one for rural strategies – cities have also been affected by COVID"

"Lots of funding available but no resource to deliver these funds"

"Dublin has historically been behind in managing urbanisation, trying to reposition an urban future for people"

What would encourage you to visit Dublin?

- Live Music Events
- Better Transport
- Airfare and Hotel Promotions
- Improved Marketing and Promotion
- Art Exhibitions
- Tour Availability
- Heritage
- Walkability
- Cost
- English Speaking
- Nightlife
- Atmosphere
- Friendliness
- Culture
- Access to Outdoors

"No real feeling of what Dublin could be like if you haven't visited (guess that goes for many cities, but with some you imagine only the positive: Melbourne Zurich for example)."
Henning Manke – Technische Universitat Dortmund

"I am open to visiting Dublin, but it is not on top of my list. If there was a particular event, such as dancing or a show or a concert, etc., then it would maybe move to the top "
Daphna Fenyves – Université de Montréal

"If it kept popping up places – i.e. an ad about visiting Dublin – that would give me an extra incentive to always have Dublin at the top of my mind. Also seeing pictures of places and understanding what was available there. Also if I were to see movies that were filmed in Dublin and have an idea of what it looks like. Dublin is on my list to visit, but there is always another place that is ahead of Dublin"
Thelia Reichard – The Co-Active Network

Critical Success Factors for Dublin?

"Talent. That is the bottom line for every major city. If you can attract the workforce then everything else will take care of itself."
Brian Castleberry – Maryland Department of Commerce (USA)

"Good management of nightlife, gastronomy and student life"
Andres Bellido Ackerman – Get Your Guide (Germany)

"Dublin (and Ireland) is not about the Irish market, it's about accessing EU and possibly UK markets. Refining a clear value proposition in this space could be helpful."
Brock Dickinson – University of Waterloo (Canada)

"Better marketing. It is a vital city but should not try to compete to be like larger cities such as London because it will never be like London. "
Dr Michael Mosser – The University of Texas

"Maintaining cultural identity while accepting the need to change."
David Bryce – OCO Global (USA)

"There needs to be a safety factor and multiple factors for families – such as good schools, affordable housing, quality of life."
Daphna Fenyves – Université de Montréal

Benchmarking Dublin's success - Vista Analysis

Initial draft results – overall ranking for Dublin

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GROUP 1: HIGH FLYERS – Rank 1 - 6

1. London
2. Paris
3. Amsterdam
4. Berlin
5. Barcelona
6. Vienna

GROUP 2: UP AND COMERS – Rank 7 -12

7. Toronto
8. Melbourne
9. Stockholm
10. **DUBLIN**
11. Hong Kong
12. Munich

GROUP 3: EMERGING – Rank 13 - 18

13. Helsinki
14. Copenhagen
15. Chicago
16. Zurich
17. Oslo
18. San Francisco

GROUP 4: LAGGING – Rank 19 - 24

19. Prague
20. Edinburgh
21. Manchester
22. Auckland
23. Wellington
24. Eindhoven

Dublin Strengths and Weaknesses

Major Strengths
- Invest

Minor Strengths
- Live
- Work
- Branding
- Power Indices

Minor Weaknesses
- Visit

Major Weaknesses
- Study

SWOT

Strengths

- Broad positive sentiment of Dublin and well known "brand"
- Recognised as the economic powerhouse of Ireland
- A successful investment and tech hub
- Seen as a fun and friendly city – no real issues around safety and security from an international perspective
- Positive "peer" perception with other influential cities
- Benchmarks indicate relatively strong performance against cities of similar scale and importantly cost of living / housing also a challenge for many other cities
- Significant policy and strategy work to shape future of city

Weaknesses

- Cost of living issues and housing issues are recognised by all constituent audiences
- Perception as "Tier 2" city in Europe
- Lack of unique appeal on the visitor side
- Perception of economic success by international constituent sometimes aligned with incentives
- Lack of power and autonomy – most strongly recognised at a local level
- Pace of development has been so fast that perhaps has impacted the "character" of Dublin
- Erosion / lack of awareness of culture and heritage
- International perceptions of Dublin rooted in historic physical assets

Opportunities

- Dublin can capitalise economically in post Brexit environment
- Strengthening of ties with other European nations and the chance to position as a Tier 1 European city
- Remote working – access to enhanced skills pool through attraction of workers from the rest of the Ireland
- Positioning of a more unique visitor offer
- Understanding how other cities manage the perceived cost issues
- Positioning as an enterprise and innovation hub

Threats

- Cost of living issue is a key threat, especially in relation to skills attraction
- Level of focus on economic positioning vs other pillars
- Competitiveness from other European cities
- Ability to tap into new markets to reduce dependence on US, UK
- Unified Communications strategy for the city and lack of focus given the regionalisation and statutory mandate of key agencies for Investment and Tourism

Next steps

- Final report with details on Perceptions research
- Development of the brand management approach
- Development of the brand narrative and positioning for Dublin
- Suggestions on creative executive
- Communications planning
- Project completion end May