



To: Members of the Public Services Committee

From: Dana L. McDaniel, City Manager

Date: April 6, 2022

Initiated By: Robert Ranc, Deputy City Manager/Chief Operating Officer
Matt Earman, Director of Parks and Recreation
Alison LeRoy, Director of Community Events
Emily Goliver, Management Analyst

Re: City of Dublin Holiday Markets

Background

At the February 28, 2022 City Council Meeting, staff recommended City Council refer the issue of a potential European-style holiday market in the City of Dublin to the Public Services Committee (PSC) (the staff memo from the February 28 meeting is attached for reference). Council referred the discussion to the PSC for additional study and discussion.

Summary

Staff has reviewed the scope of a feasibility study, as well as a potential fact-finding trip in association with a holiday market in Dublin. Further discussion of each of these topics is included below.

Feasibility Study

A feasibility study provides an opportunity to assess the technical feasibility (location and hardscape), financial feasibility (budget and revenue impacts), market feasibility (competing local holiday events), and operational feasibility (staffing and vendor availability) of a holiday market in Dublin. Analyzing the feasibility of the event allows staff and council members to better understand the optimal scope of the event, potential challenges to successfully implementing the event, as well as the potential cost and/or revenue recovery of the event.

A feasibility study can be conducted by a contractor or in-house with City staff. A contractor can provide the benefit of specialized expertise and experience, as well as the benefit of a third-party opinion regarding the feasibility of a holiday market. However, this is a niche field of analysis, and staff is still working to identify a leading firm to complete a feasibility study. Although staff will be able to provide more clarity regarding the cost of a firm once a leading firm is identified, staff estimates the cost of a study at approximately \$10,000 to \$15,000.

There are benefits to using in-house staff to complete a feasibility analysis, including an in-depth understanding of the City's strengths and potential challenges pertaining to City events. There will also not be additional cost associated with a feasibility study completed by in-house staff. However, existing staff lacks specific knowledge of European holiday markets, and staff does not have the benefit of the objectivity a contractor may offer.

Staff recommends pursuing a request for proposal (RFP) to identify a contractor to perform a feasibility study for the scope (technical, financial, market, and operational) outlined above. If

staff is not able to identify a qualified firm through an RFP, staff will return to the committee for further discussion of pursuing a feasibility study with in-house staff.

Fact-Finding Trip

During the February 28 Council meeting, Council members suggested staff experience European holiday markets first-hand. This would allow staff to meet with organizers of the events and better understand the costs, challenges, and logistical needs of hosting a holiday market in Dublin. A fact-finding trip would also provide an opportunity to see how different locations conduct the markets. For example, in Berlin there are several different holiday markets. Some build traditional chalet buildings for vendors while others set up tents.

In addition to information gathering, this trip would provide an opportunity for staff to meet with potential vendors and entertainers.

European Fact-Finding Trip

Staff has researched notable holiday markets throughout Europe, and identified potential locations for a trip to include Berlin, Dresden, and Nuremberg, Germany, with one additional city to include either Prague, Czech Republic, Strasbourg, France, or Munich, Germany. Staff anticipates the trip lasting seven (7) days and six (6) nights, with potential dates of December 5 – December 11, 2022. Staff anticipates the delegation to include three (3) to four (4) staff members, as well as up to three (3) council members, not to exceed seven (7) people. The estimated cost is between \$20,000 and \$25,000, which would vary based on the number of people, the length of the trip, and fluctuating airline ticket pricing.

United States Fact-Finding Trip

In addition to locations in Europe, Carmel, IN and Chicago, IL are potential U.S.-based holiday markets to visit. Visiting domestic, regional holiday markets can provide insight in to how European-style markets have been implemented in the United States, and provide a less expensive option than a European trip. The estimated cost for a one-night trip to Carmel, IN is \$2,800. A trip to both Carmel, IN and Chicago, IL would last two nights and cost an estimated \$6,000. The cost of each option is outlined in Table 1.

Trip Timing

There are two options for the timing of the trip: during the feasibility study or after. Should the trip occur during the feasibility study, it may illuminate additional challenges/opportunities to be considered as part of the analysis. The downside is the expense of the trip along with the uncertainty of the feasibility of a potential holiday market in Dublin.

Conducting the trip after the feasibility study is completed provides staff a clearer understanding of challenges and outstanding questions. Additionally, if the study indicates that the event is not feasible, the City would not incur the expense. However, the lack of first-hand knowledge of holiday markets may negatively impact staff's ability to provide meaningful input and/or scrutiny to a feasibility study.

Table 1.

Location	Duration	Max # of People	Estimated Cost
Europe – Berlin, Dresden, Nuremberg, and one other city	7 days, 6 nights	7	\$20,000 - \$25,000
Carmel, IN	One night	12	\$2,800
Carmel, IN and Chicago, IL	2 days, 2 nights	12	\$6,000

Recommendation

Staff requests feedback from the Committee regarding potential holiday markets in Dublin and the recommendations above, with the following discussion questions:

1. Does the Committee support an in-depth feasibility study, and should the study be completed by City staff or via a third-party firm?
2. Does the Committee support a fact-finding trip to learn more about potential Holiday Markets?
 - a. Does the Committee support a domestic and/or international trip?
 - b. Does the Committee support such a trip as part of a feasibility study or after the conclusion of a feasibility study?



To: Members of Dublin City Council
From: Dana L. McDaniel, City Manager
Date: February 22, 2022
Initiated By: Alison LeRoy, Director of Community Events
Re: Public Services Committee Referral – Holiday Market

Background

In December of 2021, Vice Mayor Cathy DeRosa prepared the attached document, which discusses the possibility of establishing a Holiday Market in Dublin. Christmas markets are typical in European countries and help drive tourism during what is typically a slow period. Visit Dublin Ohio reports that December is the slowest month of the year for Dublin hotels, typically with an occupancy rate between 45-55 percent.

Staff has begun initial research and potential locations and logistics. Staff researched five well-established US holiday markets in Pittsburgh, PA, Carmel, IN, Ottawa, IL, Chicago, IL, and Denver, CO. Attached is a detailed report of staff's findings.

Summary

The US holiday markets identified above have worked to recreate the vision and feel of the Christmas markets held throughout Europe. All markets have reported a positive economic impact on their city with visitor purchases at local cafes, shops, and hotels.

Private contractors, possessing knowledge of German traditions, manage each market. Traditional wooden chalets with holiday decorations are set around a large visual centerpiece, similar to the European markets.

Authenticity is important for the products and visual experience of guests. Wooden ornaments and nutcrackers from Germany, Lebkuchen (gingerbread), Stollen, chocolates, toys, ceramics, and knitwear are popular items at the market booths. German or Alpine foods and beverages are sold at all of the markets. Traditional German sausages, roasted almonds, and Glühwein (warm mulled wine), are also popular.

Market locations with adjacent parking and close proximity to shops and restaurants maximize the time visitors spend at the markets. Skating rinks, tree lighting ceremonies, live entertainment, special promotions, and family-friendly activities encourage residents and visitors to return throughout the season and year after year.

Recommendation

Staff recommends referring the issue of establishing a holiday market in Dublin to the Public Services Committee for further study and discussion.



The [Striezelmarkt](#) in [Dresden](#)

Background Information for the Exploration of the Feasibility of Annual “Dublin Holiday Market”

This document was prepared as background information that might be helpful to Staff in preparation of a discussion document to City Council to review a potential project to investigate the feasibility of establishing a “Dublin Holiday Market” at the new Riverside Crossing Park.

The potential project would explore the feasibility of an annual “Dublin Holiday Market” modeled after the popular European Christmas Markets that attract millions of visitors, family and friends each year. Christmas Markets originated in Germany but are now held in many other European countries. Christmas Markets date to the Late Middle Ages in German-speaking parts of Europe and eastern parts of France. Dresden Germany is said to have held the first Christmas market in 1434, established to provide a way for locals to stock up on goods for the winter and to enjoy warmth and lights on cold winter days.

In many towns in Germany, Switzerland, and Austria, the Christmas markets are open for 30+ day to align with the dates of Advent – from end of November through Christmas. Some Markets remain open until early into January to offer New Year’s activities as well.

Traditionally held in the town square(s), the Markets offer food, drink and seasonal items for sale from open-air stalls, accompanied by piped music and elaborate light displays. Foods are often cooked at the site, creating both amazing holiday smells and entertainment.

Today, the largest Markets have 100+ stalls and attract thousands of visitors each week. Larger cities have multiple Markets (Berlin Germany boasts 60+), so visitors often book vacations, or riverboat cruises, to visit the Christmas Markets of a City or Region. Most Markets have no entrance fee, so it makes it easy for visitors to go to multiple Markets in an evening or week.

Note: I have included photos from Christmas Markets that I have attended in Berlin, Vienna, and Prague as well as photos of Christmas Markets I have found on the Internet.

I. Why consider a Christmas Market in Dublin:

1. To Enhance Resident Quality of Life, and to Build Community, during long Winter Months

- a. There are no major Dublin programs/events for the 6-month period between August (Irish Festival) and March (St Patrick's Day) of each year.
- b. Holiday Markets are an outdoor activity. Experiencing winter weather and its elements are part of the allure of the Market. Visitors anticipate, and embrace, the cold weather and the activities unique to cold weather.
- c. Markets create a recurring social engagement opportunity - for both attendees and the many volunteers needed to run an annual event.
- d. Markets can/will become a "family winter tradition" for many, creating an important sense of place and community.
- e. A Market would leverage the wonderful new Riverside Crossing Park amenity. The park was constructed to support events and large gatherings.
- f. The Market will bring a new cultural experience to Dublin – offering new foods, drink and activities to Dublin and Central Ohio.

2. To Generate Economic Opportunity

- a. A multi-weekend Market would potentially fuel hundreds of new hotel stays, restaurant visits, shop visits, etc.
- b. A multiple-weekend Market would allow Visit Dublin to create uniquely Dublin "Winter Market Packages" that benefit other City amenities and businesses. For example, combining Market visits with (discounted) Columbus Zoo lights tickets or dinner/meal packages at Dublin restaurants.
- c. A winter Market would create an opportunity to attract new vendors and sponsors.

3. To Build Dublin's Brand

- a. The Market would create another unique Dublin offering. Very few communities in the US, and no other city in Ohio, host a traditional Christmas/Holiday Market of any scale. (Note, Chicago hosts the Christkindlmarkt each year at Daley Plaza, <https://www.christkindlmarket.com>)
- b. The Holiday Market could create another annual "Dublin Tradition" that can be found only in Dublin (along with the Irish Festival).
- c. New media coverage for Dublin from Labor Day through the Market dates in December.
- d. The format (formula) of the Market is repeatable. Repeatability leverages learnings, financial and event planning, and builds vendor and sponsor value/predictability. Excellence builds attendance as past attendees know they will experience a premier event (much as has done with the Irish Festival)

4. To Promote Sustainability Events. “Being Green” is Integral to the Design of the European Christmas Markets

- a. Reusable open-air stalls, reusable decorations, winter foliage and greenery, and reusable entrance and feature elements are the main themes/decorative elements of the Market and provide sustainability/reusable year after year.
- b. Waste can be limited. Commemorative mugs and glasses (\$5 deposit, returnable for a full deposit or kept as a souvenir) are used for all hot beverages, greatly reducing waste and clutter, and enhancing the experience. Many Markets also use useable/ceramic plates.

5. Important Considerations - As always, Safety must be the Top Priority. Cost and Resourcing are also Top Considerations.

- a) As with any large gathering, safety and security are the most important considerations. Christmas Markets in Europe have experienced several tragic attack events over the past few years. Cities have responded with enhanced security plans, traffic barriers and other enhanced safety protocols.
- b) Dublin has significant experience in managing large-scale, multiple day events. These large-scale events share similar considerations, among them: safety, traffic issues, safety, cost and expense management, vendor management, etc.

II. The Essential Elements of a Holiday (Christmas) Market

“Wooden huts with twinkling fairy lights, festive hubbub, and the aromas of roasted chestnuts and glühwein.”

Christmas Markets are unlike other festivals or events that are typically held in the United States. While most festivals seek to create a “unique” theme or brand by differentiating their offerings and format, the Christmas Market is an event composed of standardized elements that are fairly uniformly implemented across markets and across geographies (with some regional foods and local wares added). The “standardized format” has come to define/describe the hundreds of Christmas Market that now span cities and countries. While scale and backdrop (e.g. a castle backdrop) make some Markets particularly memorable, the elements that define a Christmas Market are required for “authenticity”.

The Christmas Market “Format”

A quick web search of “Christmas Markets” will deliver photos of Markets in Dresden, Vienna or Prague that look strikingly similar. Wooden stalls, a street-like layout, greenery, lights, evergreen signature pieces, food booths, etc. can be used to describe most of the Markets in

Europe. Christmas Market ambience is key. Below are some of the shared elements of the Christmas Market format that come together to create the ambience that make the Markets special, familiar (traditional) and authentic:

1. **Streets/Rows of crafted Wooden Stalls**, specifically designed and built for the Christmas Market. All Market vendors rent a stall that was built for the Market. The stalls are arranged to create the flow and feel of a village of small shops. Stalls are decorated in a theme consistent with that Market.



2. **Consistency detail/design.** Consistency in detail and design, across stalls as well as the gathering/eating tables and kiosks creates a harmony. All surfaces are wooden, no plastic or canvas/tent surfaces, creating the feeling of a small village. Markets provide heated eating/warming areas that serve as a central gathering place.



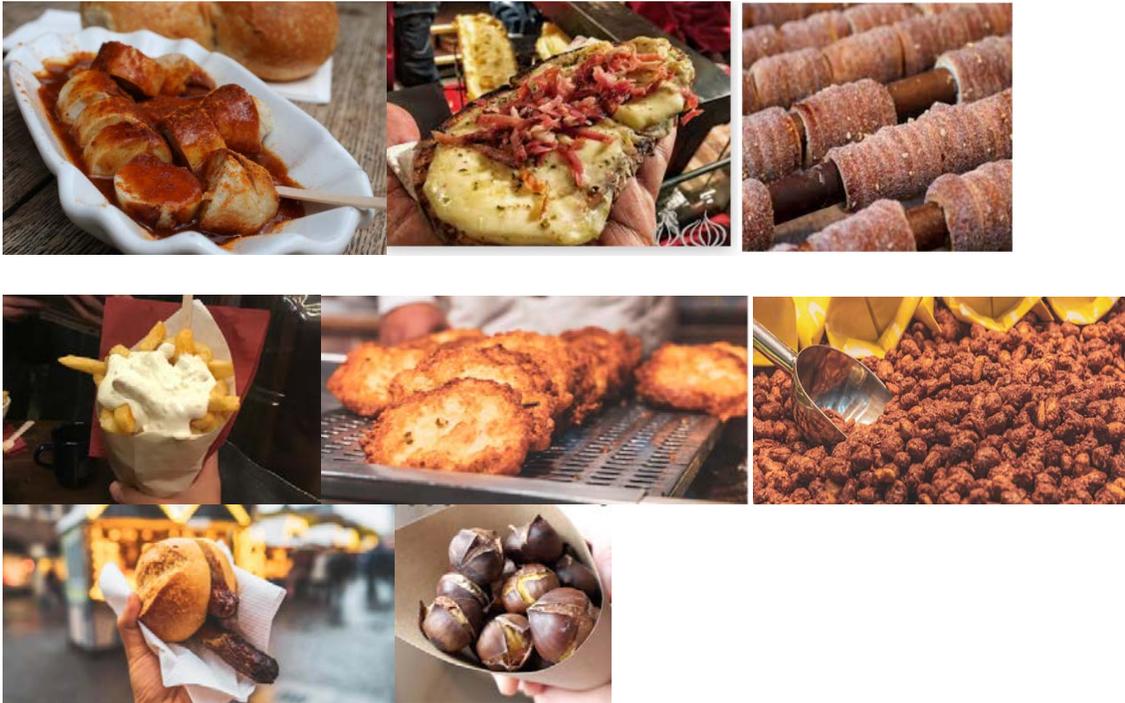
3. **Festive Music.** Classical music (not limited to traditional Christmas music), plays throughout the Marketplace. The music seems to originate from the stalls themselves, and often change as you casually stroll through the streets of the Market. Some Markets offer live musical performances, but all offer constant musical melodies.
4. **Lights.** Many, many, many, many lights. The lights, certainly designed by the architects of the Market, create the warm, festive mood and the magic of the season.



5. **Amazing Food.** Food is a central theme and the real star of The Christmas Market.

From sausages to noodles, to nuts, candies and pastries, Markets carry a very similar menu of food options across cities and countries. A few examples of the staple foods that are found at most/all Markets, from top row, left to right:

- Currywurst (sausage with sweet curry ketchup)
- Langos (fried dough with toppings)
- Trdelnik (rolled dough wrapped on a stick and topped with sugar and walnut mix)
- Pommes (fries)
- The traditional sausage sandwich (dozens of sausage varieties often available)
- Roasted chestnuts (roasted in the stall or via a roasting barrel)



6. **Outdoor cooking.** Open cooktop/flamed cooking create an entertainment element as well as sensory comforts of the market.



7. **Hot Beverages.** While many beverages are served, the two constants are beer and Glühwein (a variation of mulled/fortified wine). One of the well-loved tradition you will hear German locals discussing, is the gathering of friend to drink steaming mugs of Gluhwein. The hot red wine spiced with cloves and cinnamon is served in specially decorated mugs.



The decorated Christmas Market mug, uniquely designed for each Market each year, are often signed and dated. They are used to serve hot chocolate, coffees, etc. and are often collected as a souvenir of a fun evening.



8. Candies and Cakes and Holiday Sweets. Amazing displays of colorful candies are plentiful and inexpensive.



9. Holiday and Winter gifts. Hats, mittens and Christmas decorations stalls are commonplace features of the Market. Local holiday craft makers, as well as larger merchants, are included.



10. The Market Centerpiece. Most markets have a central “feature” element that defines the Market. These show pieces can be structures or light features.



11. Duration

Most Christmas Markets are daily events, lasting from the end of November to Christmas Day. Some Markets are extended into early January. Many are open mid-day to attract the lunchtime and holiday visitors, but most are only open during evening hours midweek.

III. Exploration - Market Economics & Management

I was unable to locate economic information via the Internet as to the various management and/or funding models for European Christmas Markets. This information undoubtedly exists, but it will require staff research and likely inquiries with local City officials and potentially Markets management organizations.

Additional photos and videos of the 2021 Berlin Christmas Markets will be forthcoming.

A Field Trip

There are a few examples of US Christmas Markets and Festivals, including Christkindlmarkt in Chicago. While a handful of US Markets may be of some interest, to really understand the magic, mechanics, and the economics of The Christmas Market, a field visit to Germany, and possibly Eastern France would be essential. There are many wonderful field trip options and several Markets could be visited in a single trip. Top considerations would include:

- Dresden, Germany and/or Nuremberg, Germany
- Strasburg, in Eastern France on the German border
- Berlin – it boasts the most Christmas Markets of any City, at over 60.

	Christkindlmarket, Carmel, Indiana	Peoples Gas Holiday Market, Pittsburgh, PA	Christkindlesmarkt, Chicago	The Denver Christkindl Market, Denver, CO	Chris Kringle Market Ottawa, IL
Market Age	4 years	10 years	25 years, Wrigleyville in 3rd year	Over 20 years	City Managed for 6 years with a \$100,000 budget.(only 10 huts and a few tents) Last two years run privately (40 huts/40 tents)
Market Dates/Times	Saturday before Thanksgiving through December 24. Noon to 9 p.m. Wednesday - Sunday	November 19-Dec. 23. Monday through Thursday 11 a.m.-8 p.m. Saturday 11 a.m.-9:30 p.m. Sunday 11 a.m.-6 p.m. Closed on Thanksgiving	Mid-November until Christmas Eve. Open on Thanksgiving. Sunday through Thursday 11 a.m.-8 p.m. Friday and Saturday 11 a.m. to 9 p.m.	November 19-Dec. 23 Sunday through Wednesday 11 a.m.-7 p.m., Thursday through Sunday 11 a.m.-9 p.m. Thanksgiving Day 11 a.m.-4 p.m. December 17-23 11 a.m.-9p.m.	Weekends Only Fridays 11 a.m.-8 p.m., Saturday 11 a.m.-8 p.m., Sunday 11 a.m.-5 p.m. (Located 1.5 hours from Chicago)
Start Up Costs	Year #1: \$420,000 Year # 2: 545,000 from the City. Additional \$6 million for Ice Rink and Wooden Huts			**Not comfortable sharing financial information. The German American Chamber of Commerce is not active in Ohio. Suggests starting with tents to see how things go before diving into expensive wooden structures.	Rent 10 huts from the City, marketing around \$5,000, \$25,000 to build more huts (20 x 6 or 10 x 6) Revenue used to build more huts each year
Staff	Non-profit organization M2M Consulting. One full time director works with city employees and seasonal hires	The Pittsburgh Downtown Partnership runs the event	German American Events, LLC. 9 Full time employees plus interns and seasonal employees	Denver German American Chamber of Commerce - Colorado Chapter and Creative Strategies Group	Floret Events LLC coordinates and manages the Chris Kringle Market.
Recurring Costs	Lighting, restrooms, electricity, staffing	Lighting, restrooms, electricity, staffing	Lighting, restrooms, electricity, staffing	Lighting, restrooms, electricity, staffing	Lighting, restrooms, electricity, staffing, building more huts
Vendor Information	20 food, 20 craft and speciality, 9 other (exhibits, demonstrations, operations, children's crafts, guest services) Only German an European	26 Full time (8 come and go) International vendors Poland, Russian, Ukraine, Irish, German, Peru, India	Large enclosed eating area called Stammtisch where patrons may reserve tables and purchase food packages. 25 food vendors plus food trucks 29 specialty vendors at Daley Square	25 artisans, 13 food vendors, 2 bars...serving gluhwein, bier, and liquer	Two areas (40 in Jordan Block and 40 in Washington Square Park)
Vendor Cost		Single booth \$6,400 Double booth \$10,400 (Wi-Fi, electricity, and product storage included)		7 x 10 single booth = \$4,250 early bird/\$4,800 later 20 x 7 double booth = early bird \$8,100/\$9,200 later 30 x 7 triple booth = early bird \$11,950/\$13,600 later Quad 20 x 14 = early bird \$15,800 or \$18,000 later	Single hut space one weekend = \$250. Pop Up Tent Space 10 x 10 per weeknd = \$150 Double hut space one weekend = \$500 Mobile Food Vendor Space = \$200

	Christkindlmarkt, Carmel, Indiana	Peoples Gas Holiday Market, Pittsburgh, PA	Christkindlesmarkt, Chicago	The Denver Christkindl Market, Denver, CO	Chris Kringle Market Ottawa, IL
Crowd Size	150,000		Over 1 million	160,000	40,000-50,000
Gross Revenue	\$1.19 million				\$30,000
Huts/Chalets	Wooden huts \$6 million spent to build ice rink and buy removable huts	Owned by the partnership, made by City carpenters. Huts come apart and must be reassembled every year. All alpine-style wooden chalets. All on pavement	Combination. Mostly wooden. All on pavement	Combination and Wooden	Pop up tents and huts, Huts \$2,000 to build 10 x 6 (20 x 6 or 10 x 6)
Associated Activities	Ballet, Actors Theater, Movies		Tree Lighting in Wrigleyville. Children's lantern parade. Kinder Club to educate children about German traditions and cultural differences	Parade of Lights, includes floats. Performances every weekend. Ugly sweater night, local bands, dancers, polka bands, Krampus Nacht and Trachten Nacht, canine Christmas	Ugly sweater weekend, Santa Sundays
Commemorative Items	Boot mugs and annual ornament	No	Souvenir mug, annual non-alcoholic mug (Peppermint the Penguin) and annual ornament.	mugs and steins	Mug
Live Entertainment	Extensive Entertainment schedule during all open hours	one stage	Bands/dancers/Christkind (The Christkind,	Denver Philharmonic Orchestra, German polka bands, traditional German dances, holiday hymns in multiple languages.	Movies, carolers, carriage rides, demonstrations, candlelight tours
Children's Activities	Crafts including lanterns, sun catchers, gingerbread houses	Ice skating, no crafts (too cold), Santa House	Ice Skating at Wrigleyville location	Meet Christkindl and Saint Nicholas on certain days	Children's train, movies, Santa, crafts, holiday games around the world,
Promotions	Santa on weekends, Military Appreciation Day, Teacher Appreciation Day, Ugly Sweater Day, 5K Run, Wood working demonstrations, etc.	Crampus Night, some themed nights		St. Nicholas	FB Event. Tik Tok. All social media
Sponsors	Extensive agreements. \$75,000 for naming rights on the commemorative boot mug	Yes, naming sponsor is Peoples Gas	Extensive. Official beer, official coffee, etc.	change event every year	Yes
Contact Information	mmurphy@carmelchristkindlmarkt.com Market Master and CEO		(312) 494-2175 www.christkindlmarkt.com	scroker@csg-sponsorship.com	Stephanie Stacy

	Christkindlmarket, Carmel, Indiana	Peoples Gas Holiday Market, Pittsburgh, PA	Christkindlesmarkt, Chicago	The Denver Christkindl Market, Denver, CO	Chris Kringle Market Ottawa, IL
Centerpiece	Gluhwein Pyramid (first of its kind in the U.S., built in 2018)	Very large wired bulbs fit together in the shape of a tree	Large Christmas Tree and Nativity	Tree, photo backdrops, Lighted Area	They change things every year. Every year they build more huts which changes the footprint. Huts are 15 feet apart on two different streets. 3 blocks apart.
Volunteers	Year #1: 600, Year #2: 200 Volunteers work as greeters, tour guides, general information, craft area	No	No. Use temporary and seasonal employees.	Not the same set up every year	The director owns a Garden Center and uses her own Winter Staff. (6 people) She owns the Garden Center and the event is an LLC.
Other	One private rental hut for corporate and private events	The entire market is anchored by Käthe Wohlfahrt in a 40 x 40 tent (German ornament importer). Christmas trees and wreaths are for sale on site. No alcohol	Strictly German	Tables for 8-10 may be reserved for \$70 inside the heated Festival Hall eating tent. Pre-paid drink tickets, steins, mugs	German Inspired. Not Chriskindl for that reason.