



Comhairle Contae
Átha Cliath Theas
South Dublin County Council

2024 – 2029

South Dublin County Tourism Strategy



Future Analytics

TOPOSOPHY
PLACE MAKING & MARKETING AGENCY

CONTENTS

Executive summary iii

1.0 Introduction 1

2.0 Situation analysis (where we are) 3

2.1 Regional and County tourism context..... 4

2.2 South Dublin County tourism performance 8

2.3 Destination analysis 9

2.4 Tourism economic impact..... 23

2.5 SCOT analysis 28

3.0 Strategy framework (Where we want to go) 29

3.1 Vision statement 30

3.2 Strategic priorities 31

4.0 Monitoring and evaluation (How do we know we are achieving it?) ...59

4.1 Monitoring framework 60

4.2 Impact targets..... 61

4.3 Utilising smart data analysis 62

4.4 Mid-Point evaluation 62

Appendix 1: National, regional, and local priorities 63

Appendix 2: Key trends in tourism 65

Overriding Status of the Strategy

Implementing this Strategy will involve South Dublin County Council helping to facilitate, promote, support and coordinate stakeholders in their activities in a way that is consistent with existing and emerging plans/programmes/strategies setting out public policy for sustainable development, including that relating to the economy, communities, infrastructure, land use tourism and environmental protection and environmental management.

This Strategy is situated alongside this hierarchy of statutory documents that has been subject to environmental assessment/ screening for environmental assessment, as appropriate, and forms the decision-making and consent-granting framework. The Strategy does not provide consent or establish a framework for granting consent and will not be binding on any decisions relating to the granting of consent.

The Strategy fully aligns with the provisions of the existing National Planning Framework, Ireland 2040, National Climate Action Plan 2023, the Eastern and Midland Regional Spatial and Economic Strategy 2019-2031, the Dublin Regional Tourism Development Strategy and the South Dublin County Development Plan 2022-2028, all of which have been subject to legislative requirements relating to public consultation and environmental assessment/screening for environmental assessment. As such, the Strategy is wholly subject to the requirements of the provisions set out in these documents, encompassing measures relating to sustainable development, environmental protection and environmental management that have been integrated into these documents, including through SEA and AA processes, and does not introduce any alterations or additions to those provisions.

In order to be realised, projects included in this Strategy (in a similar way to other projects from any other sectors) will have to comply, as relevant, with various legislation, policies, plans and programmes (including requirements for lower-tier Appropriate Assessment, Environmental Impact Assessment and other licencing requirements as appropriate) that form the statutory decision-making and consent-granting framework. It is a specific provision of this Strategy to ensure that all of the provisions from the Dublin Regional Tourism Development Strategy and the South Dublin County Development Plan 2022-2028 identified in the accompanying Screening for SEA and AA reports shall be complied with throughout the implementation of this Strategy.





Executive summary

This strategy is intended to guide the activities and work programme of South Dublin County Council from 2024 to 2029, providing clear direction for all tourism stakeholders.

The Evidence

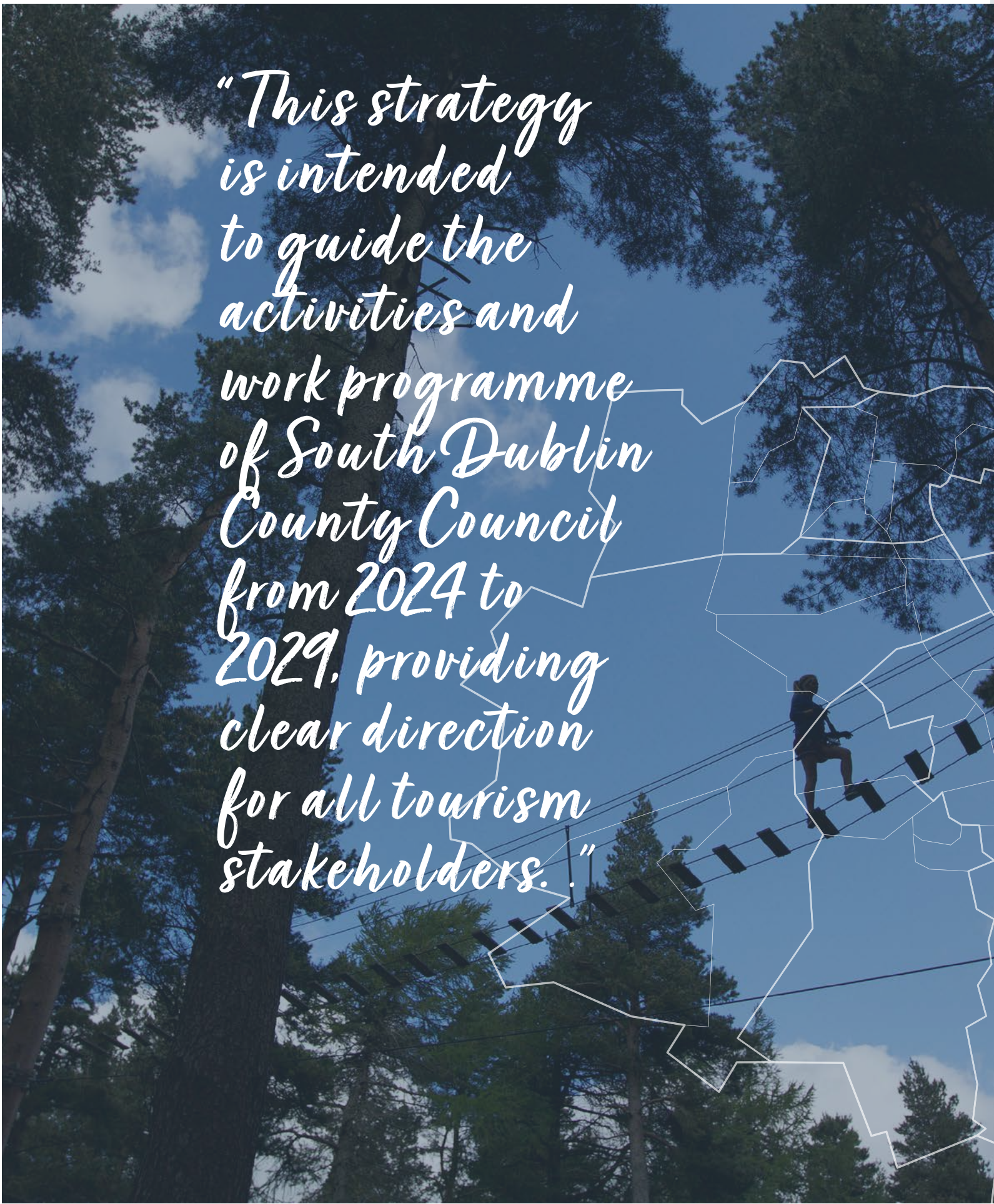
The strategy is underpinned by extensive stakeholder engagement within the County, and at regional and national level including 35 one to one strategic conversations, an online survey with 230 responses, and an in-depth focus group workshop. Extensive research has been undertaken on the ground in South Dublin County along with policy analysis and research into relevant policy and comparable good practice in international destinations.

Strategic framework

The strategy is guided by one vision, three goals, and five priorities. Strategic priorities are designed to deliver on the vision and ensure South Dublin County can build on success and realise its potential as a thriving visitor destination within the Dublin Region. Six catalytic projects are identified with each capable of contributing to the transformation of tourism in South Dublin County.

Actions identified under each strategic priority will enable compelling and high-quality visitor experiences, with an increasingly resilient, competitive, and innovative industry that provides local economic benefit to the communities of South Dublin County. A sector based on principles of sustainable and regenerative tourism, leaving places better than they were before.

The strategic framework outlined in this section seeks to capitalise on the opportunities, build on success and to address challenges, positioning South Dublin County as a thriving resilient destination for the next five years to 2029 and beyond.



“This strategy is intended to guide the activities and work programme of South Dublin County Council from 2024 to 2029, providing clear direction for all tourism stakeholders.”

Vision for tourism in South Dublin County	
South Dublin in 2029 “South Dublin is a welcoming, vibrant and thriving place to live, work and visit with a wealth of natural, built and cultural heritage celebrating the beauty and diversity of our County. We are the gateway to the Dublin Mountains, seamlessly connected to the city centre and packed full of exceptional and enriching visitor experiences.”	
Strategic priority	Action areas
SP1 - Realise our potential We will realise South Dublin’s potential through the development of new and enhanced product innovations and visitor experiences.	a) Expanding the range of things to see and do across the South Dublin County area. b) Develop an attractive range of trails and itineraries that make the most of the County’s natural and built heritage assets with the infrastructure that will support this. c) Develop new tours, activities and events that bring heritage attractions to life. d) Ensure the County’s built heritage attractions are attractive and compelling places to visit, maximising diversity of uses. e) Optimise the County’s strong and well-used framework of parks and open spaces, taking opportunities to expand, connect and develop parks within the County as a natural and cultural asset. f) Continue to develop South Dublin’s Greenway and Green Routes programmes to link up parks and open spaces along pleasant ecologically diverse corridors. g) Ensure that key locations across the County have the necessary infrastructure to support a varied and attractive range of events.

Strategic Priority	Action Areas
SP2 - Redefine our reputation By enhancing and celebrating South Dublin’s distinctive and diverse reputation and nurturing pride of place, we will support a strong, positive narrative about South Dublin as a great place to live, work in and visit.	a) Nurture residents’ pride of place by bringing local communities and the wider county together through themed events and place activation. b) Maximise the use of existing arts venues, theatres, parks and stadiums with a varied and distinctive range of events and programmes that attract visitors from both within and outside the County. c) Continue South Dublin’s improvements of gateway entry corridors, upgrading the landscape and visual amenity of main routes through the County. d) Support external communications with key partners such as Fáilte Ireland to help domestic and international visitors understand why they should visit South Dublin through the development of itineraries and familiarisation visits, and provision of information on new attractions.
SP3 - Reinforce connectivity We will strengthen connectivity with quality multi-modal transport and active travel routes to, from and within the County.	a) Develop and curate itineraries that encourage greater numbers of visitors to flow through the region and stay longer. b) Support public transport links that will ensure visitor attractions and popular routes are well connected. c) Implement cohesive visitor interpretation and orientation signage across South Dublin as well as increasing cross-promotion of the County’s key attractions, parks and open spaces.
SP4 - Regenerate our natural spaces We will champion sustainability and prioritise a regenerative approach to ensure sustainable and inclusive growth for people, nature and the environment.	a) Ensure that South Dublin’s tourism businesses have access to support, guidance and funding that aids the transition towards sustainable operations. b) Champion good practice in sustainability and accessibility among local businesses, and curating this for visitors and tourism sector partners. c) Keep communities involved and consulted on major tourism developments. d) Nurture regenerative tourism experience development in the County
SP5 - Refresh partnership working In order to deliver on this strategy, we will need to proactively support collaboration amongst public, private and third sector stakeholders and seek to strengthen cooperative governance at a local and regional level.	a) Establish optimum delivery and management mechanism for SDCC for an expanding visitor asset portfolio and festivals and events programme. b) Ensure the tourism industry sector of South Dublin has a collective voice and can contribute to strategic tourism development decision-making. c) Build knowledge and skills among the local tourism and hospitality sector to capitalise on the potential of the County’s tourism products and visitor experiences. d) Reinforce regional collaboration and synergy in tourism delivery. e) Ensure evidence-based approach to tourism investment by enhancing data collection.

01 Introduction

South Dublin County features an exceptional natural beauty, with significant cultural and historic heritage. The County has potential to offer exceptional visitor experiences and this strategy will assist South Dublin County Council in realising this ambition.

South Dublin County is a key element of the wider Dublin region, featuring a diverse natural, cultural, and built environment, ranging from urban hubs to beautiful countryside, rivers, canals and the western part of the Dublin Mountains. These assets are of appeal to a wide range of different visitors and thereby provide opportunities to strengthen its visitor economy. There is a significant opportunity to raise the profile of the County with the domestic and international audience, with many not aware of what the County has to offer.

As Ireland's capital, and home to some of Ireland's most important and popular visitor attractions, Dublin is of central importance to the tourism economy of the whole island. Pre-pandemic Dublin attracted 6.6 million overseas tourists of which three in four were first time visitors. These visitors spent €2.2 billion in the capital as they built lifelong memories across the city with many travelling on to other parts of the country, contributing to local economic activity. Additionally, another 2.1 million tourists visited the capital from across the island of Ireland spending €391 million during their visits. Reliant as tourism is on international travel, face-to-face contact, and on the availability of staff to operate attractions, the COVID-19 pandemic was a severe challenge for the tourism sector.

Two-thirds of Dublin hotels report lower levels of overseas visitors, and approximately 60% of hotels have lower levels of visitors from Northern Ireland, although this could be attributed to increasing costs and tight availability of accommodation. Staff turnover has been high with almost a third of staff to be employed in 2022 to be new entrants to tourism, which is the same rate as in 2021¹, meaning two thirds of staff will have entered the sector within the last two years which in turn may impact upon staff experience and customer service. There are international concerns about the sustainability of the recovery and the ability to attract and retain enough staff to deliver high quality service. However, there are continued signs of growth and increased demand in 2022, which brings associated resourcing and management challenges.

Given these challenges South Dublin County needs to sustainably plan for the next phase of the County's tourism evolution – one which increases bed nights, dwell time, and spreads economic benefits widely across the county area, while seeking to capitalise on proximity to the city centre. In doing so it is essential that tourism develops in balance with the communities and environment of the county; not only minimising negative impacts but seeking a net positive impact.

Development of this strategy is well timed, given the recent, current and planned capital investment in tourism and recreational infrastructure in the County, including Dodder Greenway, Grand Canal Greenway, Tallaght Stadium, Dublin Mountains Visitor Centre, Lucan village, Clondalkin Round Tower, and Rathfarnham Stables, 12th Lock Hub and Lucan House, as well as the N81 landscape upgrade, and provision and upgrades of several new and existing parks. The future is bright for tourism in South Dublin, provided sufficient resources are invested in the management of tourism, enhanced collaboration, and development of the tourism sector in the County.

1 Source: Fáilte Ireland Labour Research February 2022

Building on the previous tourism strategy, this new South Dublin County Tourism Strategy provides clear direction and an enabling framework for all tourism stakeholders in South Dublin over the next five years in terms of supporting the recovery, growth and development of the tourism sector in the County. The strategy positions South Dublin to capitalise on opportunity, become increasingly resilient, benefit from higher yield visitors and to identify clear action areas that focus on themes of high potential and compelling experiences.

02 Situation analysis – (Where we are)

2.1 Regional and County tourism context

Dublin Regional Context

Overseas

- » In 2019 saw over **6.6 million overseas** trips were made to Dublin, with a total of **10.8 million** overseas trips to Ireland overall recorded in the same year. ²
- » These overseas visitor numbers to Dublin generated a total of **€2.2 billion** in revenue in 2019. This equates to **€333 average spend per visitor**. While this figure is lower than similar figures recorded in Ireland's other regions, this is likely due to shorter stays taking place in Dublin due to its popularity as a weekend trip/getaway among overseas markets and consumers.
- » **Mainland Europe was the largest source market in both volume of visitors and in revenue in 2019**, accounting for 40% of all overseas visitors and generating 37% of all revenue. Within Mainland Europe, the primary countries comprising this market include France and Germany. Other countries, such as Spain and Portugal, are growing in terms of visitors coming to Ireland.
- » **While Britain accounted for the second largest market by volume at 29%, visitor spend is low in comparison to Mainland Europe** (16% of all revenue generated) and North America (31% of all revenue generated). The large share of revenue generated by North American overseas visitors may likely be due to these visitors taking longer trips to Ireland and Dublin or as part of bigger cross-country European trips.



Table 1 International visitor to Dublin by source market, revenue and visitor volume 2019, (Source: Fáilte Ireland)

Source Market	Revenue (%)	Revenue (€)	Visitors (%)	Visitors (No.)	Average. Revenue per Capita (€)
Britain	16%	€325 million	29%	1.91 million	€170 spend per visitor
North America	31%	€682 million	23%	1.52 million	€449 Average spend per visitor
Mainland Europe	37%	€814 million	40%	2.64 million	€308 Average spend per visitor
Other	16%	€325 million	8%	528,000	€616 Average spend per visitor

Data is not available at a sub-regional level such as for South Dublin County, which limits understanding of the origin and value of visitors to the County. The need for the acquisition of data to inform tourism decision making is called out late in this strategy.

2 2019 is the latest international visitor data available from Fáilte Ireland

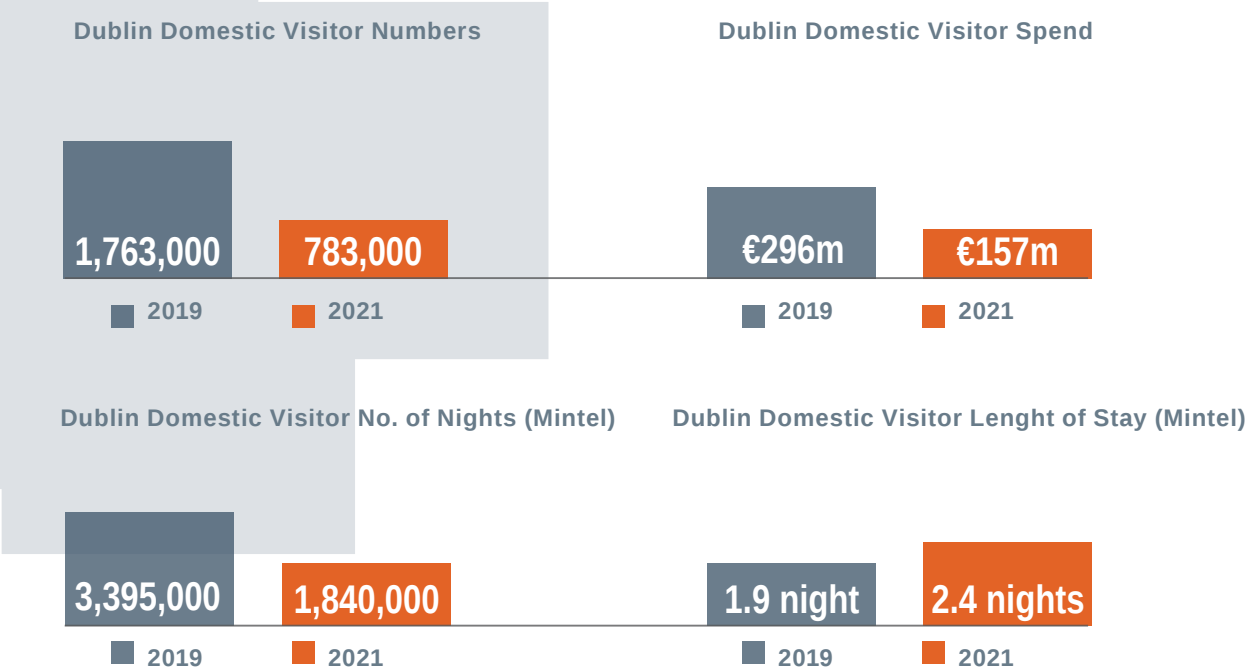


Figure 1 Domestic visitors to Dublin volume and revenue 2019 and 2021 (Source: Mintel)

- » In 2019 over 1.8 million domestic tourists visited Dublin, generating €296 million in revenue. **This equates to an average spend of €168 per visitor, which is lower than all other regions in Ireland.** This is likely due to a significantly lower length of stay among domestic visitors, spending an average of 1.9 nights per stay.
- » Most domestic visitors traditionally travel to Dublin for specific reasons. These include sporting or music events/festivals or to visit friends and family, which most likely explain the comparatively low average number of nights spent in Dublin. This provides an opportunity for SDCC in terms of new events at Tallaght Stadium and the National Basketball Arena. There are further opportunities for large scale events, including conferences, were a suitable venue to be developed in the County.
- » **Overall, visitor numbers and spend in Dublin have decreased since 2019.** Domestic visitor numbers (-44%), domestic visitor spend (-53%) and number of nights spent (-54%) all decreasing between 2019 and 2021. However, **average length of stay for domestic visitors has increased since 2019 by 0.5 nights in 2021.** Of course, each of these figures are influenced by the impact of COVID-19 on the tourism industry. Developing linkages between the city centre and South Dublin County will become increasingly important for drawing residents and visitors out from the city centre. This means investment in new and compelling attractions, completion of recreational corridor infrastructure such as Greenways, and continued promotion of the South Dublin offer.

Motivation Domestic

In terms of the motivation of visitors to the Dublin region the table below assesses the profile of each of the segments which have been identified for the domestic market by Fáilte Ireland. With localism becoming an increasingly important aspect to consider in tourism development, **understanding the sentiments and motivations of domestic visitors is key to creating a tourism offering which is reflective of**

the interests of local communities and businesses. Indeed, it is worthwhile South Dublin County Council developing ‘must see/do’ experiences to really unlock the local and domestic visitor market. This cohort spend €168 per visitor versus €333 per international visitor, but there is merit in targeting this cohort in the short and medium term until such regional linkages as greenways and sustainable transport is available.

The definitions of each of the motivations are as follows:



Figure 2 Fáilte Ireland Travel Motivations Framework

Fáilte Ireland's new [Motivations Segmentation for the domestic market](#) is a research-based segmentation model which illustrates primary motivations for trip preferences within the domestic market. As outlined within the Dublin Regional Tourism Strategy, after motivations, other drivers for trip preference include what visitors wanted to do, when they want to take a trip, and who with (such as travel party). The model is comprised of seven categories as shown in figure 2. Insights for the Dublin region indicate the key motivational segments include Social Energy (21%), Adventure (18%) and Time Out (17%). Motivations Segmentation for the international market is expected by the end of 2023.

Social Energy: The most important motivator for domestic visitors to the Dublin region is Social Energy. This segment is comprised mainly of younger visitors, either as a couple or as part of a bigger social group. These visitors enjoy the atmosphere and vibrancy of the places they visit, both during the daytime and at night. **With one in five visitors to Dublin falling within this segment, developing a County which is vibrant, both for daytime activities and night-time, will be essential for South Dublin County in attracting domestic visitors into the future.**

It is essential that to facilitate a more vibrant county, both during the day and night, there are venues and places to host events, festivals, and shows. This includes more venues, more diverse venues and innovative use of public squares and buildings. The night-time economy is particularly important as this will encourage visitors from near and far to stay longer in the area. This includes shows and events (for example outdoor screenings).

Adventure: Visitors within the segment tend to take part in activities which push them to step out of their comfort zone. Many of these are physical activities or events, such as runs, cycles and swims. With a rise in popularity for adventure tourism and outdoor activities emerging from the COVID-19 pandemic, **South Dublin County is well positioned to capture this demand for outdoor activity events such as triathlons, running events and niche sports.** Many visitors within this segment originate from a large age demographic, often with a high propensity to stay and spend locally and nearby to where their chosen event or activity is set to take place. Much of the consumer spending from this segment is within the hospitality sector, such as restaurants, cafés, bars and bistros.

Table 2 Visitor Numbers to South Dublin Attractions 2018-2022 (Source: Fáilte Ireland)

Attraction	2018	2019	2020	2021	2022
Clondalkin Round Tower	2,970	117,797	33,939	110,859	129,998
Pearse Museum	33,978	33,223	6,645	27,550	17,759
Rathfarnham Castle	9,631	10,705	3,003	4,552	9,713
Hellfire Club	84,566	94,926	143,505	176,216	114,304

Full year figure is not available as our RTVC footfall counter was installed in Dec 2018. Count for December 2018 was 2,970. The centre closed its door on 13/03/2020 due to Covid restrictions. It remained closed for the rest of the year.

2.2 South Dublin County tourism performance

Tourism data is currently provided at a regional level for Dublin by Fáilte Ireland, as outlined in the previous section. The lack of data at a sub-regional level, that is, for the four local authorities within the Dublin region is a key issue for each authority, and means the evidence base to inform policy and investment is not sufficiently granular.

Three visitor attractions provide visitor number data to Fáilte Ireland: Clondalkin Round Tower, Rathfarnham Castle and Pearse Museum. Visitor numbers to each was impacted by COVID-19, as can be seen from Table 2. It is interesting to compare the impact on these indoor attractions with significant growth in footfall to Hellfire Club during the same period, which provided a local amenity during COVID-19 restrictions.

The performance of the County's cultural visitor attractions has been mixed. Attractions such as Clondalkin Round Tower have been recovering to pre-COVID-19 visitor levels since 2021. The Civic Theatre has seen a significant increase in footfall, with 2023 figures (year to August) significant exceeding those from 2022. South Dublin County's natural attractions (Hellfire Club, Cruagh Wood, Glenasmole and Kiltipper Park) have all experienced growth in visitor numbers since 2015. All four of these attractions experienced peak visitor numbers in 2021. This aligns with the initial phases of public health restrictions being lifted and subsequent re-opening of public parks, walking and hiking trails. Of these natural attractions, the Hellfire Club received the highest number of visitors in 2021, peaking at 176,216, albeit likely influenced by recreational patterns during COVID-19 restrictions. This provides supporting information to guide future investment.

Due to gaps in data for certain attractions, there is restrictions in charting visitor numbers from 2015 up to the present. This limits how comprehensive data analysis can be for certain attractions and metrics. **More comprehensive recording of visitor numbers and other tourism performance metrics should be undertaken to accurately project the performance of visitor attractions within the County. For example, through increased investment in footfall counters.**

Time Out: This is a motivation for all age groups of visitors and particularly couples who are keen to engage in cultural attractions, shopping or spa trips. Convenience, ease of journey and accommodation choice are important decision factors. This is about unwinding and enjoying relaxing time with partners and significant others. South Dublin can capitalise on this motivation by ensuring transport connections are seamless, providing matching itineraries and suggestions for trips that would appeal to this segment. Trips focus on couples from all age groups.





2.3 Destination analysis

Featuring a diverse natural, cultural and built environment, South Dublin County possesses many assets which target different visitor types and thereby strengthen its visitor economy. **There is a superb opportunity for South Dublin County to position itself as an outdoor destination, building on its strategic location within the Dublin region.**

The strategy must form a framework to guide and enable future investment under current and future funding initiatives.

Figure 3 South Dublin County Context



Access and Connectivity

South Dublin County is supported by strong connectivity and access across several transport modes. The County is well catered for by public transport, being served by both rail and bus routes. However, direct linkages between the city centre and Tallaght to the Dublin Mountains are lacking, constraining access to this area of South Dublin (and the Dublin Region) for residents and visitors.

South Dublin County has recently benefitted from progressive development of several key green infrastructure corridors including the Grand Canal Greenway and the Dodder Greenway which each connect South Dublin County to the city centre. When fully complete, the Dodder Greenway's future importance to the County's active travel and sustainable transport infrastructure will be hugely significant, creating linkages between the city, the County and the mountains. With the South Dublin County section of the Greenway currently in the final phases of planning and construction and expected to be fully complete by 2024. Completion of the full route is dependent on Dublin City Council, however a significant proportion of the population of South Dublin can now access a major recreational resource and this should be promoted in

media and events, subject to compliance with the wider planning framework (refer to "Overriding Status of the South Dublin County Tourism Strategy" under Section 1.0).

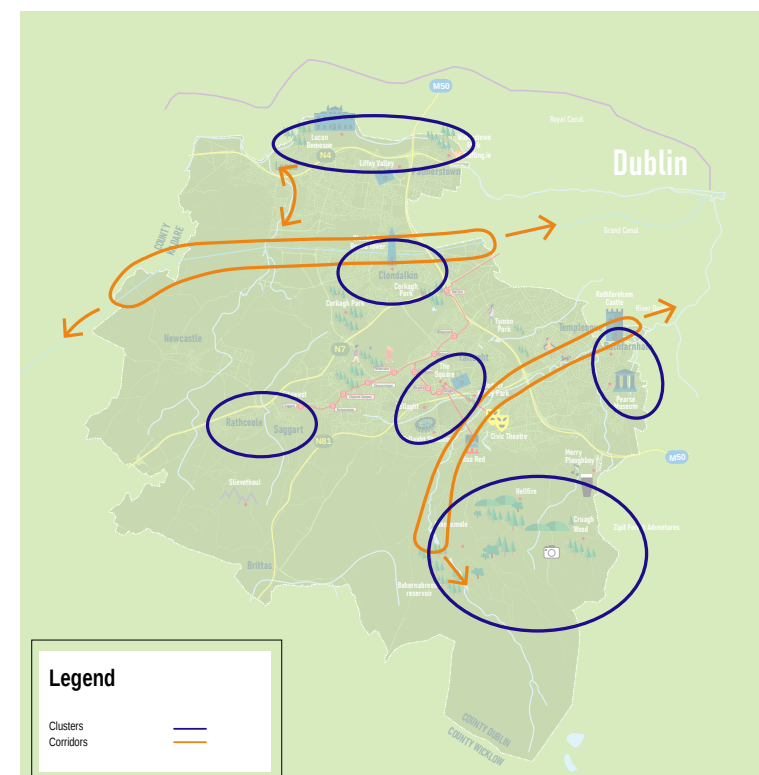
Tourism clusters

Understanding the spatial distribution of South Dublin County's tourism offering is essential to recognise where certain gaps in the County's tourism product exist. It is also essential for considering the locations within the County where future product development would be the most impactful. From this, viewing various areas within the County as 'clusters' can aid in understanding their tourism offering.

Key tourism clusters include:

- Tallaght Cluster
- Clondalkin Cluster
- Dublin Mountains Cluster
- Liffey Valley Cluster (including Lucan and Palmerstown)
- Rathfarnham Cluster
- Rathcoole-Saggart Cluster
- Dodder Corridor
- Grand Canal Corridor (including Clondalkin)

Figure 4 South Dublin County Tourism Clusters and Corridors



There are a range of other neighbourhoods within South Dublin County that could at a later stage become additional tourism clusters for example, parts of the City Edge area, but there would need to be a significant increase in the tourism product offer first (such as, enough reasons for visitors to dwell in the area for a morning or afternoon).



Accommodation

South Dublin County's proximity to the city centre is an asset to be leveraged when promoting the County for business tourism. There are twelve hotels in the County all catering for meetings, conferences and other events. There is an increasing opportunity to promote the wider recreational offer of South Dublin County as an add-on to conference packages by Fáilte Ireland. Development of itineraries in this regard would be ideal. Hotels are mostly located in a 30 minute radius minutes from Dublin City Centre.

Only two venues can host over 500 people: the Maldron Hotel (with recent significant investment in conference facilities) and the National Basketball Arena, however the primary function is as a sports facility rather than for business or event purposes and a strategic change of direction with regards to holding events is a medium-term risk. The Tallaght Stadium fourth stand development will allow for an outdoor capacity of up to 20,000 to enable the hosting of concerts and other large non-sporting events.

Closure of the Citywest Hotel for humanitarian reasons has had a noticeable impact on the County's provision of conference and events space. As a result, **there are opportunities to develop high-quality and high-capacity indoor events spaces to infill the current lack of event spaces in the County** (by the private or public sector subject to appropriate business case analysis). Opportunities exist to create better synergies with large, outdoor venues such as Tallaght Stadium.

As of March 2022, Fáilte Ireland's Visitor Accommodation database recorded just four alternative visitor accommodation (Guesthouses, Bed and Breakfasts, Caravan and Camping parks, and so on) providers within the County. **There is a relatively low provision of alternative visitor accommodation within South Dublin County**, with most of the accommodation being found either within the city centre or in areas north of the city and towards Fingal County. Camac Valley is the only Dublin-based caravan and camping park found close to Dublin city. There are further opportunities for the development of motorhome parking in the County's towns and villages, as well as other key recreational sites. In other counties development of similar facilities has been largely driven by the local authority.

Venue non-hotel	Location	Conference capacity
Tallaght Stadium	Tallaght	5/300 indoor; up to 20,000 outdoor
The Civic Theatre	Tallaght	309 persons
National Basketball Arena	Tallaght	2,100 to 3,000 persons



Visitor Attractions

South Dublin County has an increasingly diverse range of that showcases its scenic landscape and cultural heritage.

Hosting a wide breadth of activities, such as hiking and walking, running, mountain biking and cycling, the **Dublin Mountains** have seen a notable growth in popularity since 2010. Areas of the Mountains such as the Hellfire Club and Cruagh Woods attract significant numbers of visitors, garnering a combined total of 239,620 visitors in 2021. Pipeline projects such as the Dublin Mountains Visitor Centre will aim to further enhance the offering and popularity of the Mountains among locals and visitors alike. It is critically important that the construction of the **Dublin Mountains Visitor Centre** is developed in tandem with a management structure, animation and engagement programme, that seeks to maximise the potential of this significant public investment. With increased visitor numbers expected into the future, it will be imperative that sustainable linkages are created between the city, the County and the Mountains in terms of a movement strategy for the Dublin Mountains, developed in liaison with other relevant stakeholders.



All of the above will be undertaken in compliance with the wider planning framework (refer to “Overriding Status of the South Dublin County Tourism Strategy” under Section 1.0).



Rathfarnham Castle, a key heritage attraction within the County and a National Monument, is the attraction within the County in closest proximity to the city. In 2021 Rathfarnham Castle received 4,552 visitors, 40% of the 2019 figure. However, this must be considered in the context of museums only re-opening in July 2021 which means it would have been very difficult for them to reach full-year pre-pandemic figures in the remaining months of 2021. There is a significant opportunity for the OPW to further invest in Rathfarnham Castle with immersive interpretation that brings the Castle and its history to life.

South Dublin County Council are currently engaging with a successful tenderer for the development and management of **Rathfarnham Castle Stables and Courtyards** for use as a multi-purpose and flexible facility, aiming to provide up to 2,700 sq. metres of mix-use services and offerings, complementing the Castle and its existing visitor experience and tourism offering. Linking key attractions such as Rathfarnham Castle with key infrastructure such as the Dodder Greenway is an example of the physical linkages needed within the County to enhance its overall tourism product offering.

The planned **Tallaght Heritage Centre** will include a new building with interpretation covering the history of Tallaght and its built and cultural heritage. The heritage centre will form part of and help to reinforce the Tallaght Cultural Quarter which includes the Civic Theatre, Rua Red – the South Dublin Arts Centre, the County Library and the new civic plaza.

Furthermore, South Dublin County hosts a variety of large parks with high visitor numbers. This includes **Corkagh Park, Tymon Park, and Dodder Valley Park.**

The increasing range of visitor attractions that are developed and owned by South Dublin County Council mean that it is imperative a new and effective operation and management model is identified and implemented.



The new stand at **Tallaght Stadium**, owned and operated by South Dublin County Council, will bring the seated capacity of the grounds for sporting events to 10,000 enabling the hosting of concerts and other large non-sporting events for up to 20,000 patrons.

The **Clondalkin Round Tower** is one of four remaining round towers in County Dublin and a national Monument. It's one of South County Dublin's most recognisable and most popular visitor attractions since the opening of the visitor centre and the completion of refurbishment works to the tower in 2017.

Located in Rathfarnham, The **Pearse Museum** is surrounded by the parkland of Saint Enda's Park, which is one of Dublin's most attractive parks with an attractive riverfront and walled garden. According to Fáilte Ireland, 33,223 tourists visited Pearse Museum in 2019 falling to 27,550 in 2021, albeit impacted by Covid-19 restrictions. Enhanced linkages, animation and marketing would enhance visitor awareness of Pearse Museum and St. Enda's Park, as well being used for smaller events, however as this is an Office of Public Works (OPW) managed site this would be dependent on their strategic view and priorities.



Visitor activities

Public consultation conducted in February 2023 identified that the quality of, and access to, nature and open spaces was seen as the County's strongest attribute. Connecting the County's natural environment with its tourism offering will be essential to developing the sector out to 2030.

The County's attractiveness as a destination for **recreational cycling** is hugely supported by the Grand Canal and Dodder Greenways. Both Greenways will play an integral part in both linking the suburban and peripheral areas of South Dublin County with the City and the Midlands, providing the infrastructure needed to enable accessibility and mobility to other attractions and activities within the County, City and Midlands. Plans to link the Royal and Grand Canal Greenways are also underway.

Corkagh Park contains Ireland's only purpose-built cycle track. It is a dedicated cycling facility providing a safe, traffic free, environment in which to learn skills, improve fitness, train and race.

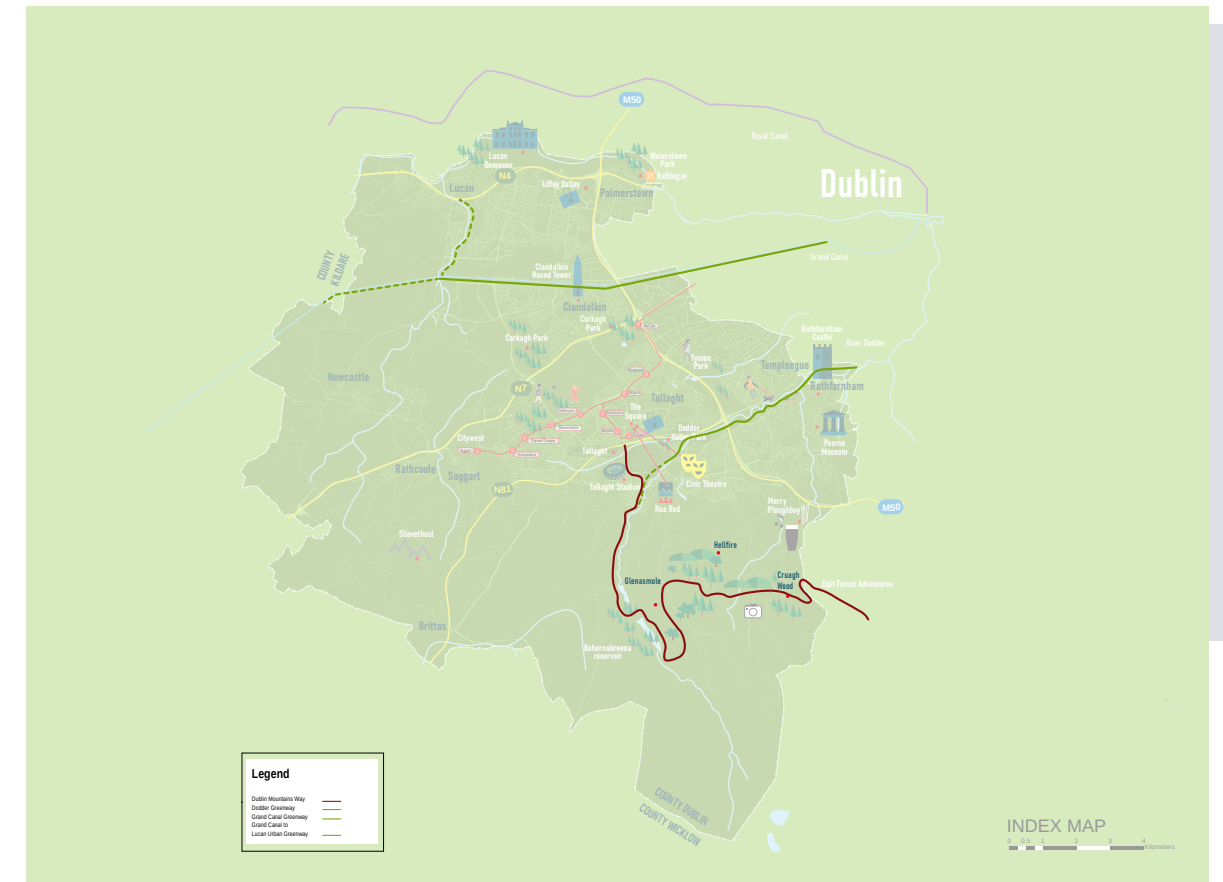


Figure 5 South Dublin County Recreation Corridors



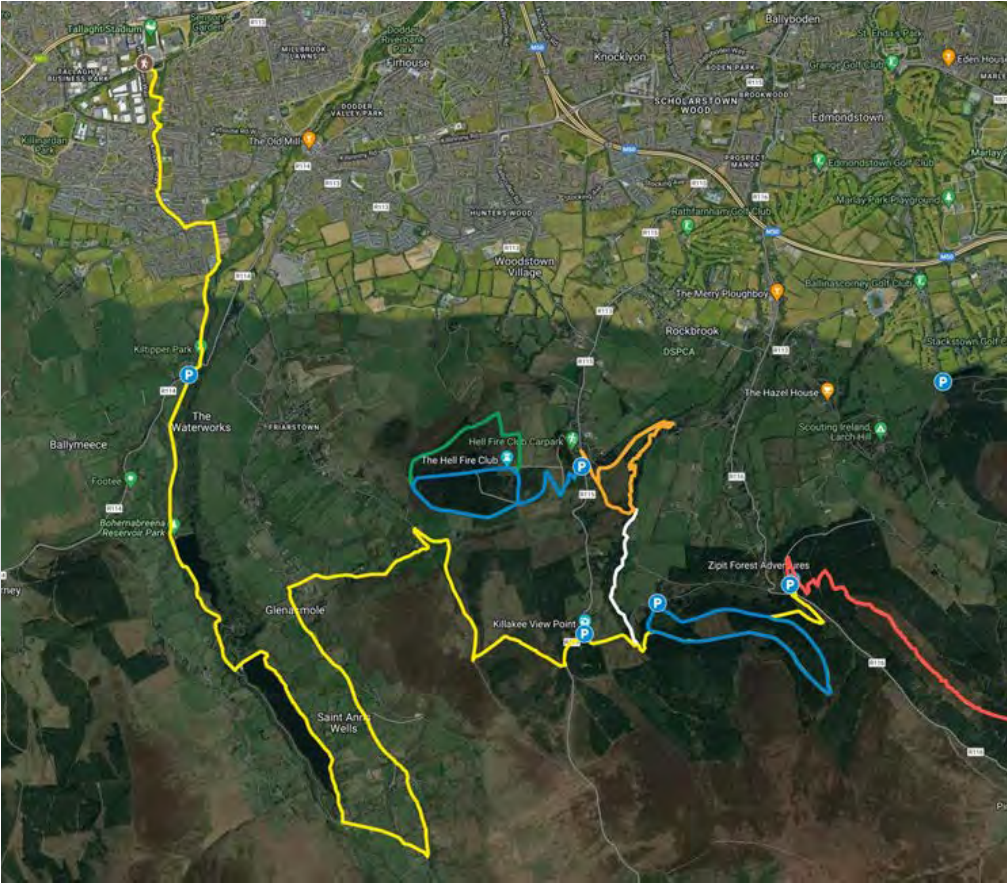


Figure 6 Walking and Hiking Trails in South Dublin County (Source: DLR Tourism.)

The **Dublin Mountains** provides high-quality trails and woodlands through scenic locations. These trails and woodlands are some of the County's most popular destinations for hikers and hill walkers, with areas such as Cruagh Wood seeing over 270,000 visitors since 2019. Opportunities also exist to work with bodies such as the Dublin Mountains Partnership in implementing the Dublin Mountains Partnership's Strategic Plan 2022-2026.

The **Dodder Greenway and Grand Canal Greenway** corridors are popular walking trails. Each are predominantly used by pedestrians and are pedestrian priority environments.

Slade Valley is an attractive rural location leading from the rapidly expanding Saggart - Rathcoole cluster to the more rural uplands. The proposed Slade Heritage Trail (referred to as the Slade Valley Walking Route under the County Development Plan) is intended to link Rathcoole, Saggart and Brittas. If such an amenity were to be developed, it would enhance the tourism potential and economic development potential for the local community. Although the full potential of the Slade valley has not yet been realised the council will consider exploring opportunities with relevant stakeholders to realise the Slade Valley trail having regard to land acquisition constraints.

Walking has become an increasingly popular activity within the County following the COVID-19 pandemic. Areas such as Tymon Park, Dodder Valley Park, Corkagh Park, Kiltipper Park, Griffeen Valley Park, St. Enda's Park, Rathfarnham Castle Park and Waterstown Park are well-located in suburban areas for easy access by patrons, while **Bohernabreena Reservoir** provides a

rural location for walking and light cycling. Access to nature is becoming increasingly important and opportunities exist to marry sustainable environmental development with visitor attractions in South Dublin's parks. **Adventure activity providers** such as Footee in Kiltipper and Rafting.ie in Palmerstown cater for a wide consumer base, with corporate groups, kids' parties, stags, hens and sports team groups all being welcomed to take part in the activities they offer. The future growth of adventure tourism in South Dublin County will be an important segment of its tourism offering outside of its current operators.

Both private and public **golf courses** can be found within the County, providing accessible green fees for many casual golfers while also providing championship-quality courses for avid golfers or for corporate clubs and retreats. Opportunities exist for South Dublin County Council to facilitate relationships between hoteliers and golf clubs within the County, where these do not already exist, to provide discounted visitor packages for corporate groups, capitalising on South Dublin County's 'Business Leisure' segment.

The County's landscape character lends itself to **equestrian activities** with eight centres, many of which operate equestrian schools and private lessons.

Angling is a popular and accessible activity due to the number of waterways and water bodies within South Dublin County. Water bodies such as the Bohernabreena Reservoirs, Brittas Reservoir, River Liffey, River Dodder and Camac River provide for fishing through permits, day passes, and fishing club memberships.

Cultural tourism, festivals and events

The country's traditional customs, oral history, language beliefs, and skills are a part of the cultural tourism and heritage which forms a linkage between the natural and built assets of the country. South Dublin County has some of the key cultural centres of the country like Rua Red, Civic Theatre Tallaght, and Aras Chrónáin Irish Cultural Centre each of which has a vibrant year-round events programme.

Current festivals and events include:

- Red Line Festival
- Corkagh Park Urban Picnic
- Tymon Park Market
- Rathfarnham Castle Christmas Event



Data collected by SDCC indicates that event promotion through the County's Tourism, Event and Festival grant shows a positive return on investment and that such events are an effective tool to draw visitors to the County. However there are challenges and consistent engagement and site investment is needed to grow this sector.

Visitors may not solely travel to visit South Dublin County, but the more attractions, events and sites of interest that can be provided, the more the County can be positioned as a more exciting, interesting and sustainable tourism option, encouraging visitors to stay longer each time they visit.

Equestrian Centre
Cruagh Lodge Stud
Rathfarnham Equestrian Centre
Fettercairn Youth Horse Project
Greenogue Equestrian
Calliaghstown Equestrian Centre
Blackthorn Hill Stud
Hampton Lodge Equestrian
Badger Hill Stud



Food, drink and the night-time economy

The restaurants, cafes, gastropubs, breweries, and marketplaces in South Dublin County offer a variety of dining alternatives. A key issue for South Dublin County is the current lack of high-end food and drink offerings in comparison to other destinations in Ireland. Creating the opportunity for such businesses to flourish, by creating spaces such as public squares is key to encouraging visitors to stay longer in the area. The development of Rathfarnham Castle Courtyards as a regionally important food destination hub will encourage visitors to stay longer in the area. To drive development of the night-time economy in South Dublin County it will be important to facilitate and encourage development of more restaurants and an enhanced public realm with more places to eat outdoors, as well as an evening programme associated with festivals, events, theatre and arts.

Heritage

The term 'heritage' refers to all that we have inherited from previous generations. Heritage connects us to our past and develops a sense of place. Heritage can be considered in terms of natural, built (tangible) and intangible heritage, the County's traditional customs, oral history, language beliefs, and skills.

Natural Heritage: South Dublin County's 'green infrastructure' includes flat plains stretching away into Kildare, river valleys and streams, low foothills overlooked by higher mountains, with deep mountain valleys that reach back into the Wicklow Mountains. In the uplands of the Dublin Mountains, there are mountain grasslands and gorse scrub, larger areas of commercial forestry, and open wet bogland and heath. The Dublin Mountains, which define the south-western boundaries to the County, can be viewed from most parts of the lowland plains.

There are two Special Areas of Conservation (SAC) within South Dublin (i.e. Glenasmole Valley SAC, Wicklow Mountains SAC). There is one area designated as a Special Protection Area (i.e. Wicklow Mountains SPA). There are no Natural Heritage Areas. However, there are six proposed Natural Heritage Areas (pNHA) (i.e. Dodder Valley, Grand Canal, Liffey Valley, Lugmore Glen, Glenasmole Valley, Slade of Saggart and Crooksling Glen).

Tangible Heritage / Built Heritage: There are 542 structures in the study area listed in the South Dublin Record of Protected Structures (RPS). As a result, these properties are protected under the Planning and Development Act 2000. In general, these buildings make an important visual contribution to South Dublin's urban areas and rural landscape. More specifically, a large proportion of the established and potential tourist attractions within the Local Authority area are protected structures. These include: Pearse Museum, various bridges, locks and buildings associated with the Grand Canal, the Hell Fire Club and

Bohernabreena Reservoir. Should the building owner wish to make alterations that would change the character of one of these buildings, planning permission must be applied for from South Dublin County Council.

There are approximately 375 archaeological sites listed within the Record of Monuments and Places (RMP) that are located within the study area. Being listed provides these places with protection under the Historic and Archaeological Heritage and Miscellaneous Provisions Bill 2023. When the owner or occupier of a property, or any other person, proposes to carry out any work at, or in relation to, a recorded monument, they are required to apply for a licence from the Minister for Housing, Local Government and Heritage.^{3,4} SDCC launched the South Dublin Heritage Trail app in 2020. The app includes 16 individual heritage points of interest in and around Clondalkin, Rathfarnham and Tallaght villages using images, text and audio for each point, adding to the opportunity for residents and visitors to engage with the cultural heritage of South Dublin County. SDCC is working on developing a trail of Templeogue and Saggart / Rathcoole villages. SDCC is in the process of developing a world-class County Heritage Centre/ visitor experience in Tallaght Town Centre that will act as a new cultural amenity for the citizens and visitors to South Dublin.⁵

For the first time SDCC is titled OHD2023 Partner' of Open House Dublin (OHD) which is delivered by the Irish Architecture Foundation (IAF). The IAF will work with SDCC to agree and realise a programme of tours and events for Open House Dublin.

3 <https://www.sdcc.ie/en/services/planning/heritage-and-conservation/conservation-areas/>
<https://www.sdcc.ie/en/services/planning/heritage-and-conservation/protected-structures/record-of-protected-structures-schedule-2.pdf>

4 <https://www.sdcc.ie/en/services/planning/heritage-and-conservation/>

5 <https://www.newsgroup.ie/a-heritage-centre-for-south-dublin/>

6 Neo Gaeltacht/Nua Ghaeltacht - an area where Irish has a strong presence as a spoken language but is not part of the officially defined or traditional Gaeltacht areas.

Intangible Heritage: Intangible Heritage establishes a link between the natural and built heritage. While less visible it is as important as built heritage for reinforcing a sense of place and providing an opportunity to engage visitors. Clondalkin is one of the 'Neo-Gaeltacht'⁶ areas across the country. There may be opportunities for South Dublin County to highlight the Irish language as part of national events, given proximity to a large population area, such as Seachtain na Gaeilge, one of the biggest Irish language festivals celebrated across the world to promote Irish Language and culture. Examples of such events include daytime/evening events and workshops. Tradfest is now one of Dublin City's most vibrant festivals. There is a significant opportunity for South Dublin County to develop linkages with this festival, with events hosted in Rua Red and Civic Theatre Tallaght, and Aras Chrónáin Irish Cultural Centre, subject to the programming requirements and strategic direction of these venues.



2.4 Tourism Economic Impact

While an analysis of sentiments and attitudes towards tourism development can provide useful insights for charting the future of tourism within South Dublin County, an estimate can be made of the monetary value of tourism within the County, based on the number of tourism businesses within the South Dublin County and a range of assumptions (for example occupancy, opening days and visitor spend). These are shown in Figures 7-9. It is acknowledged that these lists may not be exhaustive. This approach to evaluating economic impact has been used as it easily replicable and comparable and enables the potential impact of development of new accommodation, attractions and activities to be considered. There are limitations, in that this does not consider day visitors who may travel to South Dublin County for the purposes of a walk or cycle or to visit a café or restaurant. However, across the country there is currently a lack of granular research and data into the economic impact of day visitors at a local level. Research to address this data gap would provide valuable insights to guide investment decision-making and promotion.

Accommodation sector

	Approved Accommodation - Category	Total Number Per Accommodation Type	Estimate Rooms/ Units Per Accommodation Type	Estimate Average Occupancy Per Accommodation Type	Estimate Average Opening Days Per Annum Per Accommodation	Estimate Average Accommodation Cost/ Visitor Spend Per Day	Estimate Average Total Accommodation Revenue
Approved Accommodation	Hotels	12	184.5	80%	320	€170.00	€96,353,280.00
	B & B	2	3	70%	120	€100.00	€50,400.00
	Caravan and Camping	0	0	50%	160	€100.00	€0.00
	Self Catering	1	1	70%	280	€150.00	€29,400.00
	Hostel	1	27	70%	220	€20.00	€83,160.00
Non-Approved Accommodation	Hotels	0		70%	320	€120.00	€0.00
	B & B	3	10	70%	140	€100.00	€294,000.00
	Caravan and Camping	1	213	50%	220	€40.00	€937,200.00
	Self Catering	0	0	70%	140	€100.00	€0.00
	Hostel	419	1.5	70%	100	€150.00	€6,599,250.00
Estimate Total Accommodation Revenue							€104,346,690.00

Figure 7 Estimated Accommodation Sector Revenue

It should be noted that some Airbnb properties are not approved tourism accommodation, although some have the Welcome standard. While they are included for the purposes of estimated revenue, they are not promoted as official visitor accommodation by South Dublin County Council.



Attractions sector

	Attractions	Total Number Per Attraction Type	Estimate Average Daily Visits Per Attraction	Estimate Average Opening Days Per Annum Per Attraction	Estimate Average Attraction Spend Per Visit	Estimate Average Total Attraction Revenue
Attractions	Historic Houses and Castles	1	100	160	€10.00	€160,000.00
	Museums and Attractions	2	100	140	€10.00	€280,000.00
	Churches, Abbeys and Monasteries	1	400	260	€10.00	€1,040,000.00
	Gardens	0	100	80	€10.00	€0.00
	Art Galleries and Theaters	2	600	140	€10.00	€1,680,000.00
Estimate Total Attractions Revenue						€3,160,000.00

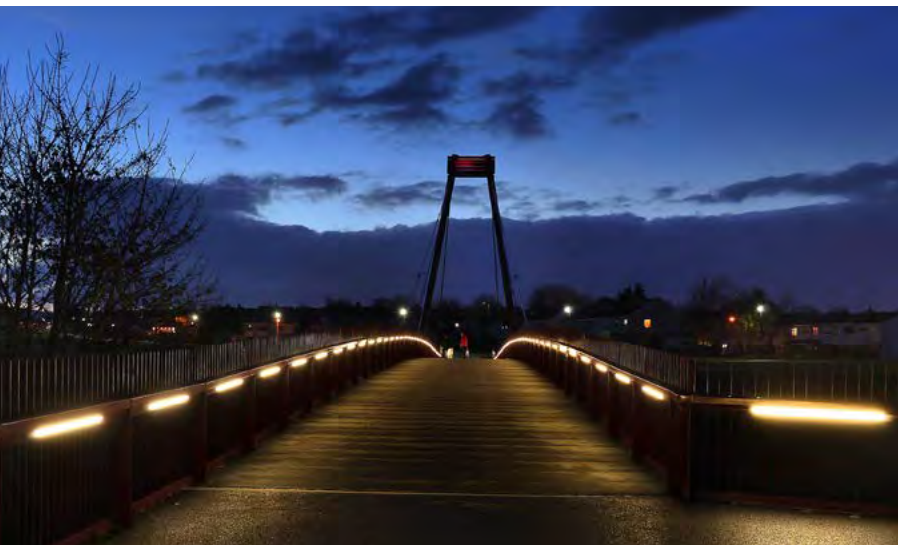
Figure 8 Estimated Attractions Sector Revenue



Activities sector

	Activities Providers	Total Number Per Attraction Type	Estimate Rooms/ Units Per Accommodation Type	Estimate Average Occupancy Per Accommodation Type	Estimate Average Opening Days Per Annum Per Accommodation	Estimate Average Accommodation Cost/ Visitor Spend Per Day
Activities	Activities Operators	4	100	100	€60.00	€2,400,000.00
	Beach and Watersports	1	100	160	€60.00	€960,000.00
	Angling Operators/ Guides	0	100	100	€20.00	€0.00
	Equestrian	10	100	220	€15.00	€3,300,000.00
	Golf Course and Ranges	11	300	140	€40.00	€18,480,000.00
	Tour Guides/ Operators	4	100	180	€60.00	€4,320,000.00
Estimate Total Attraction Revenue						€29,460,000.00

Figure 9 Estimated Activities Sector Revenue



The data contained in these tables indicate the following indicative spend:

Sector	Indicative spend (€)
Accommodation	104,346,690
Attractions	3,160,000
Activities	29,460,000
Total	136,966,690

A figure of approximately **€137 million** can be estimated for visitor revenue from tourism within South Dublin County.

Based on Fáilte Ireland data indicating that approximately 27 jobs are generated for each €1 million of tourism expenditure, **this indicates 3,699 jobs are based on tourism in South Dublin County.**

Fáilte Ireland further indicate that for every euro spend on tourism (domestic and overseas, 23c is generated in tax. **This indicates that tourism within South Dublin County is worth approximately €31.5 million to the Irish exchequer annually.**

Indirect and induced benefit

Using an accepted multiplier of 1.5⁷ it can be estimated that the indirect and induced benefits of **visitor expenditure within South Dublin County is worth €191 million to the Dublin regional economy.**

Economic Impact	€137 million
Multiplier	1.5
Direct, Indirect and Induced ⁷ Benefits - Impact to Output	€205 million

7 The Scottish Government's Input-Output Multiplier Tables estimate a multiplier effect of 1.5 This means that every £1 of increased demand generates a further £0.50 of output in other sectors in Scotland, with the same principle and assumption applied to DL RCC. <http://www.gov.scot/Topics/Statistics/Browse/Economy/Input-Output/Multipliers>

Total economic impact

Combining the indicative direct visitor revenue and the indirect and induced benefits gives a figure of **€304 million as a value of total economic impact from tourism expenditure within South Dublin County.**

Direct benefit of visitor-related expenditure	€137 million
'Direct, Indirect and Induced' Benefits - Impact to Output	€205 million
Overall Total Impact	€342 million

However, it is acknowledged that some data may already be out of date, and it can be difficult to provide an accurate assessment. There is an opportunity to address future assessment of economic impact in greater detail, to enable South Dublin County to provide more accurate data on an annual or bi-annual basis.

Summary

The following observations can be made with regards to the economic value of tourism in South Dublin County:

- » Tourism is estimated to generate **€137 million in revenue** annually.
- » This revenue can be expected to support **3,699 jobs based on tourism.**
- » Tourism within South Dublin County is worth **€31.5 million to the Irish exchequer** annually.
- » Indirect and induced benefits of visitor expenditure within South Dublin County is worth **€205 million to the regional economy.**

Combining the indicative direct visitor revenue and the indirect and induced benefits gives a figure of €342 million as a value of total economic impact from tourism expenditure within South Dublin County.

It can be seen from the above analysis that further investment and support for the tourism sector in the County will result in additional economic benefit and employment generation benefiting communities throughout South Dublin County. An approach to setting targeted and assessing potential impacts from further development and promotion of the tourism sector in South Dublin County is discussed in more detail in Section 4: Monitoring and Evaluation.



2.5 SCOT analysis

Strengths	Constraints
» Air access to Dublin has increased from all markets. » Close proximity of South to Dublin city centre. » Range of hotels. » Highly diverse county with over 90 languages spoken as well as thriving communities with active local community groups. » Rise in hybrid working. » Consumers (local and from nearby areas) have continued strong demand for close to home travel. » Varied geography and natural built and cultural heritage assets: waterways which link South Dublin to Dublin city centre, large and diverse public parks, cultural heritage venues and attractions. » Strong, well developed recreational network of parks and open spaces providing green routes and linkages through and to the county. » Dublin Mountains recognised as major strategic growth opportunity by Fáilte Ireland. » Limited range of existing outdoor activity providers and walking opportunities in the Dublin Mountains. » Significant capital investment committed to tourism projects in recent years. » Range of multi-agency partnerships.	» South Dublin's tourism offer is relatively unknown. » Accommodation capacity and range remains limited. » Staffing challenge among hospitality industry. » Heritage visitor attractions (such as Rathfarnham Castle, Pearse Museum, Clondalkin Round Tower) have low resonance with international visitors. » Lack of a nationally significant visitor attraction. » Lack of a range (or a choice) of significant indoor event spaces. » Current lack of direct transport links to the Dublin Mountains. » Need for defined activation and marketing strategy for Dublin Mountains Visitor Centre. » Lack of linkages from Dublin City Centre to Palmerstown-Lucan along Liffey Corridor. » Insufficient internal (SDCC) resources to capitalise on tourism opportunity. » Lack of a county-wide tourism board and network. » Insufficient South Dublin County specific tourism data available. » Need for more 'champions' of South Dublin to help raise profile. » Need to comply with the provisions of the wider statutory decision-making and consent-granting framework, including those relating to sustainable development and environmental protection and management.
Opportunities	Threats
» Harness opportunity of new, enhanced and pipeline visitor attractions and infrastructure for example Dublin Mountains Visitor Centre, Tallaght Stadium, Clondalkin Round Tower, Dodder Greenway, Proposed 12th Lock development. » Potential to work with Uisce Éireann on a feasibility study for a visitor strategy (and outdoor water sports centre for Bohernabreena Reservoir. » Potential to develop cycling offer including cycle routes and a South Dublin major cycling event. » Parks could be utilised for large outdoor events. » Leverage community-driven storytelling. » Continue to strengthen Dublin's commitment to sustainable tourism. » Promote South Dublin as a place where tourists can spend time away from the city centre. » Enhance the profile of South Dublin. » Adopt cutting-edge technology and encourage more businesses to engage in the Digital that Delivers programme. » Harness availability of Fáilte Ireland Enterprise Supports. » Feasibility assessment for city-mountains public bus service. » Dart + South West programme bringing DART trains (23 per hour) to Hazelhatch. » Increased resourcing for the management and development of tourism in South Dublin (including site management). » Creation of a county-wide tourism board and network. » Opportunity for synergies and for further collaboration.	» Value for money is increasingly seen as critically important. » Car hire sector continues to lack capacity. » Acute labour shortages. » Competition from neighbouring counties. » Negative publicity and reaction from residents. » Media coverage disproportionately focusing on crime rates, inequality and social issues damaging place brand. » Gap in competition between accommodation in Dublin city and South Dublin grows. » Residents could oppose any tourism related developments that are deemed to offer few benefits or opportunities for residents.

03 Strategy framework (Where we want to go)



3.1 Vision statement

While the tourism sector, and society in general, have passed through several turbulent years, the future of tourism is bright in South Dublin County. Significant investment in key tourism and recreation capital projects will provide an increased range of infrastructure enabling tourism development. Investment is aligned with regional tourism objectives to encourage visitors out of Dublin city centre to the wider Dublin region, including the Dublin Mountains. In turn this will support increased local economic development based on tourism and enhance visitor experience.

Recent years have shown us that we do not know what is ahead of us. However, we can seek to make our society more resilient by taking local action to ensure any development proposals contribute to effective climate action. The tourism sector can, and must, play a central role in efforts to combat climate change. This is an imperative that must underpin this strategy.

Equally important to highlight is the Council's commitment to universal design, equality and human rights, and that tourism is for all persons, regardless of age, ability, and family status.

Tourism development can provide benefits for local communities and help to reinforce local pride and positively change perceptions of place. South Dublin County is culturally rich, edgy in a positive way, and abounds with thriving communities, vibrant culture, and beautiful towns, villages, rivers, and parks. Enhancing local resident and visitor access is key to encouraging people to visit South Dublin's beautiful places. The diversity of landscape from mountains to waterways with new recreational infrastructure over

the lifetime of the strategy means South Dublin County is well positioned as a gateway to the outdoors.

Development of a vision statement for South Dublin County has been carefully considered, building on the previous tourism strategy, recognising progress in the development of the tourism offer in the County, and underpinned by the need to ensure tourism development in the County contributes to climate action and to building stronger communities. The vision and strategic priorities outlined in this section are guided by four over-arching goals:

1. **Plan sustainably for the next phase of the County's tourism evolution** – increase bed nights, dwell time, and spread economic benefits widely across the County area, while seeking to capitalise on proximity to the city centre and national and regional objectives to spread visitation throughout the Dublin Region.
2. **Position South Dublin to capitalise on its strongest assets** and use these to benefit from higher yield visitors and to identify clear action areas that focus on themes of high potential and compelling experiences, attracting visitors that will appreciate the County's natural spaces and built heritage.
3. **Build on the previous tourism strategy** to provide clear direction and an enabling framework for all stakeholders in South Dublin County over the next five years to support recovery, growth and development of the tourism sector in the County.
4. **Ensure that tourism supports inclusive economic growth in South Dublin**, helping the County to become increasingly resilient by providing access for local people to good jobs, opportunities to build skills and ensure that the tourism sector is better integrated with other key sectors of the County's economy.

Implementation of the Strategy must comply with the provisions of the wider planning framework (refer to "Overriding Status of the South Dublin County Tourism Strategy" under Section 1.0).

Proposed vision statement

South Dublin County in 2029

“South Dublin is a welcoming, vibrant and thriving place to live, work and visit with a wealth of natural, built and cultural heritage celebrating the beauty and diversity of our County. We are the gateway to the Dublin Mountains, seamlessly connected to the City Centre and packed full of exceptional and enriching visitor experiences.”

3.2 Strategic priorities

Five strategic priorities have been identified to realise the vision, each of which have several action areas.

SP1 - Realise our potential

We will realise South Dublin's potential through the development of new and enhanced product innovations and visitor experiences.

SP2 – Redefine our reputation

By enhancing and celebrating South Dublin's distinctive and diverse reputation and nurturing pride of place, we will support a strong, positive narrative about South Dublin as a great place to live, work in and visit.

SP3 - Reinforce connectivity

We will strengthen connectivity with quality multi-modal transport and active travel routes to, from and within the County.

SP4 – Regenerate our natural spaces

We will champion sustainability and prioritise a regenerative approach to ensure sustainable and inclusive growth for people, nature and the environment.

SP5 - Refresh partnership working

In order to deliver on this strategy, we will need to proactively support collaboration amongst public, private and third sector stakeholders and seek to strengthen cooperative governance at a local and regional level.

The rationale for each strategic priority, along with detail on the action areas and specific actions under each, is outlined in this section.

Catalytic projects

There are six catalytic projects that are instrumental to the further transformation of the South Dublin tourism offer. These are projects that will raise the profile of South Dublin and encourage visitors to stay for longer, see more and critically spend more in the County.

These catalytic projects and the rationale are outline across in Table 3.

Table 3 Catalytic projects for South Dublin County

Strengths	Constraints
Bohernabreena Reservoir Tourism Feasibility Study (action 1.2)	A new watersports centre/visitor hub at Bohernabreena will provide a focus for the area and for the end of the Dodder Greenway. This study would determine the feasibility of developing such a centre including the operational and governance model.
Lucan House Opportunity Study (action 1.3)	Lucan House is in the process of being acquired by South Dublin County Council. This study would identify an optimum use to create a tourism hub for Lucan, encouraging visitors to the area.
Feasibility study for a significant new multi-purpose South Dublin Conference and Events Centre (action 1.6)	A new venue will capitalise on the demand for conference and event venues in the Dublin area and provide opportunities to link business with leisure/ adventure activities in the area.
Increased availability of alternative forms of visitor accommodation in South Dublin (action 1.18)	Increased opportunities for visitors to stay overnight in the South Dublin area, particularly near in the Dublin Mountains area, will in turn generate spin-off economic opportunities.
New participatory multi-day sporting events that showcase the scenery of the Dublin Mountains (action 2.3)	Supporting multi-day events generates increased overnights stays which in turn drives economic opportunity such as places to eat and drink, as well as generating both demand for and awareness of South Dublin County events.
Dublin Rambler bus service (action 3.3)	A bus service linking urban centres and transport such as the LUAS stop in Tallaght with key visitor hubs such as Dublin Mountains Visitor Centre, Zipit and other activity providers in the Dublin Mountains area, potentially linked with a similar service from Dun Laoghaire Rathdown, would make the Dublin Mountains more accessible to a wider audience and minimise private car use.

Seven significant pipeline tourism projects, the majority of which will be completed during the lifetime of the strategy, will contribute to the range of compelling attractions and activities in the County. These include:

- Development of the Dublin Mountains Visitor Centre
- Upgrade to Tallaght Stadium
- Completion of the Tallaght Heritage Centre (action 1.4)
- Development of Rathfarnham Castle Stables and Courtyard (1.5)
- Completion of the 12th lock HUB Area Plan (1.7)
- Completion of the Dodder Greenway (1.10)
- Completion and enhancement of Grand Canal Greenway in South Dublin County (1.11)

Strategic Priority 1 – Realise our potential

As explained in the SCOT (Strengths, Constraints, Opportunities, Threats) analysis earlier in this document, South Dublin County has an impressive range of nature-based assets, as well as nationally recognised heritage attractions and urban hubs. Therefore, the first strategic priority in the South Dublin County Tourism Strategy is centred around moving the County onwards from its current status of being a 'pioneering' destination to becoming a 'progressing' destination, principally by expanding the range of experiential activities available for visitors, on a year-round basis.

The Dublin Mountains, Bohernabreena, Corkagh Park, Dodder Valley Park, Dodder Greenway, Grand Canal Greenway, Slade Valley and Liffey Valley are all assets within the County which underpin the County's strong natural heritage and identity. Above all, this provides a firm foundation upon which to further develop the range of adventure and active tourism products available to visitors, as well as to enhance those that are already in place.

In addition to providing clear benefits to local people in terms of an expanding range of leisure activities on their own doorstep (highlighted as a source of pride in the residents' survey carried out for this strategy), **unlocking the County's natural assets will also help to broaden both domestic and international visitors' perceptions of how big the Dublin region is, and how a visit to the city can be easily combined with enjoyable and stimulating outdoor activities too, without necessarily having to venture elsewhere in the country.**

Furthermore, South Dublin's high-quality built heritage sites such as the Clondalkin Round Tower, Rathfarnham Castle, Balrothery weir, Bohernabreena Reservoir, Pearse Museum and Hellfire Club each help to bring alive different chapters of Ireland's national story. With vibrant interpretation, events and good supporting infrastructure (such as improved connectivity, educational resources, signage and food and beverage offer), we can help to raise the profile of these sites among local people, thereby increasing visitation and pride of place, while increasing their national and international profile; thereby making the need to visit easier and more compelling to a wider range of visitors.

Diversifying visitor profile and dwell time

Creating a broader range of outdoor activities that cater to different levels of physical ability and visitor motivations (such as, fitness, relaxation, socialisation or exhilaration) will help to broaden the appeal of South Dublin among wider audiences and help the County to attract different combinations of visitors (for example, couples looking for rest and relaxation, as well as groups of adrenaline seekers).

It will therefore be critically important to increase the range of suitable visitor accommodation, especially at or close to key outdoor activity sites, notably in the Dublin Mountains as well as the Camac Valley Caravan Park. As well as delivering economic benefits in terms of income generation and job creation, establishing appropriate accommodation in the mountains area, that is respectful to the mountains' environment and local communities, could help to convert the mountains from a day trip destination into a multiple-day destination, thus increasing visitor dwell-time in the County.⁸

⁸ The South Dublin County Development Plan 2022-2028 limits accommodation in the zoning objective HA-DM (High Amenity-Dublin Mountains 'To protect and enhance the outstanding natural character of the Dublin Mountains Area') over the 350m contour line to B&Bs in existing premises. Below the 350m contour line within the HA-DM zoning, hotels, guesthouses and hostels are open for consideration in existing premises. Caravan Parks and camp sites are not permitted in the HA-DM zoning.

The same principles apply to animating the County's expanding network of greenways and active travel routes in other ways; for example, by ensuring that routes are well signposted, and facilities such as toilets, parking, rest stops and refreshments are provided in the right places. This will help to ensure that routes such as the Dodder Greenway and Grand Canal Greenway become more than attractive routes from A to B, but become destinations, that visitors are keen to dedicate time to, and which are managed in a way that reduces their social and environmental impact. Ensuring that Greenways protect and enhance the sensitive environments through which they pass is a key requirement for greenways and essential to ensure they retain their 'green' status.

In summary, **unlocking the County's assets through experiential product development** will include:

Expand the range of things to see and do across the South Dublin County area. In consultation with local communities, business owners and neighbouring local authorities, we will seek to expand the range of activities that visitors with different levels of physical ability and motivation are able to enjoy throughout the County, thereby broadening the appeal of the County to wider groups of travellers who will be encouraged to stay in the region for longer. While recognising that a number of initiatives are currently underway in the County, there are opportunities for new destination 'hooks'.

The City Edge Project is a collaborative initiative between South Dublin County Council and Dublin city Council to reimagine the Naas Road, Ballymount and Park West areas of Dublin as a new urban

Quarter providing up to 40,000 homes and 75,000 jobs – see link to website at [The City Edge Project | A Transformative Initiative](#) for Dublin City. At 700 Hectares, the scale of the project makes it unique in Ireland and one of the largest redevelopment opportunities in Europe. A Strategic Framework has been prepared which sets out a high-level vision and delivery strategy for the regeneration of the area to 2070.

Several key projects have been identified in the [City Edge Strategic Framework](#) each of which offer offers the potential to act as an anchors for the medium to long term development of this area of Dublin. Examples of projects within the part of City Edge within the SDCC functional area are given below:

- » Green and blue infrastructure such as the proposed Grand Canal Linear Park and River Camac Linear Park.
- » Tymon to Phoenix Greenway, a proposed 25-40m wide green corridor for recreation, active travel and biodiversity linking these two major parks.
- » New neighbourhood centres including Greenhills, Red Cow and, Cherry Orchard, with opportunities for cafes, restaurants and night-time economy hubs.
- » Adaptive reuse of industrial buildings/factories.
- » Culture, arts and the creative economy such as developing a destination anchor that can catalyse regeneration e.g. St. Martin's Art College relocated to a restored granary building in 2011 as part of the wider regeneration of King's Cross, London.



“It has long been mooted that Ireland needs a concert hall with a capacity greater than 400 people for the hosting of large-scale events for national audiences, and City Edge may be the perfect location” page 77

- » Meanwhile uses that can potentially catalyse cultural activity for including markets such as the [Boxpark Market](#) Shoreditch, London approach.

“City Edge is going to be a canvas for innovation and experimentation...” page 78

In addition to City Edge, there are further opportunities elsewhere in South Dublin County, which could be further explored and investigated. For example:

- » Water-based activity hub at Bohernabreena Reservoir.
- » Lucan House activation plan
- » A new multi-purpose South Dublin Conference and Events Centre.
- » An innovative water-based sport facility drawing on international best practice.

Develop an attractive range of trails and itineraries that make the most of the County's natural and built heritage assets with the infrastructure that will support this.

In addition to providing benefits to local people in terms of improved cycling and walking connectivity away from the road network, we will develop the County's network of walking and cycling routes along established lines (greenways already in development) as well investigating opportunities along other routes with obvious geographical characteristics (for example Liffey Valley). Where possible, we will aim to link routes so that they become compelling, and easily navigable for users. South Dublin County Council will explore tourism opportunities in the Palmerstown area having due regard to the Silver Bridge, walking trails and cycling routes, the river Liffey, the area's natural and built heritage and the integration of tourism initiatives with both Dublin City Council and Fingal County Council.

While the food offer in South Dublin County is not yet sufficiently advanced to enable development of a food trail, this could present a future opportunity such as Gourmet Greenways.

Develop new tours, activities and events that bring heritage attractions to life.

Working with local and national operators, we will support the development of the County's built heritage sites in ways that expands their appeal to broader audiences, encourages repeat visitation and makes them even more enjoyable and inspiring. This can include expanding the range of events held at properties, hosting exhibitions with broad consumer appeal, or expanding exhibit interpretation in a way that connects the site with specific community groups.

Ensure the County's built heritage attractions are attractive and compelling places to visit, maximising diversity of uses. Reflecting the more flexible way in which people spend their leisure and work time in the wake of the COVID-19 pandemic, spaces such as visitor attractions and hospitality venues have also taken on a greater appeal as places to meet, work and spend leisure time. First and foremost, the County's built attractions must be well connected to their local communities and become easier to reach for visitors coming from further afield, through improved transport connections and parking facilities. Furthermore, by offering appealing facilities for food, drink and retail, this will also help to increase visitor dwell time, while providing appealing meeting spaces for the local community too.

Optimise the County's strong and well-used framework of parks and open spaces, taking opportunities to expand, connect and develop parks within the County as a natural and cultural asset. The large public parks in South Dublin are an asset for the County, both for local residents and visitors to the area. Adamstown and Clonburris SDZ contain plans for the development of several new parks, including two that have been recently completed at Adamstown. South Dublin are currently funding a significant regeneration of Corkagh Park which includes augmenting park visitor facilities by the creation of a hub area in the centre of the park with an events space, coffee shop, seating area and other facilities. There are also improvements to the wider park to augment car parking, family fun opportunities and improve wayfinding and signage. There are opportunities to further enhance other SDCC parks such as Tymon Park, Dodder Valley Park, as well as opportunities associated with the City Edge initiative, including restoration of the Camac River corridor, links to a new Walkinstown Eco Park, and enhancement of the Grand Canal; corridor as a Linear Park. A new signage and branding strategy has been developed for the parks and will commence roll out in Corkagh Park and Kiltipper Park and there is an opportunity to roll this out to parks County-wide. The key to developing the parks as a natural asset is to provide and improve ecological links between them; linking the county's green infrastructure and allowing biodiversity to thrive. The parks of South Dublin County currently provide a range of recreational and cultural opportunity. The aim will be to optimise these assets and opportunities; while protecting and enhancing existing biodiversity and to seek new opportunities over the lifetime of the plan.

Continue to develop South Dublin's Greenway and Green Routes programmes to link up parks and open spaces along pleasant ecologically diverse corridors. The last few years have seen significant investment in the development of the Dodder Greenway by South Dublin County Council. Completion of this greenway, as well as other key initiatives such as the Grand Canal Greenway towards the Kildare border, and the Griffeen Valley Greenway between the Grand Canal and Lucan, will further enhance the greenway network in the county, which will be of benefit to residents and visitors. The City Edge initiative identifies a transformational greenway network, including proposals for a greenway between Tymon Park and Phoenix Park, which should be supported. The county's Green Infrastructure policies; requiring new developments to seek ways to improve and protect Green Infrastructure will help link up green spaces within the county. Opportunities may arise for further greenway developments, subject to protecting and improving the environment through which they pass, (a key requirement in the definition of Greenways). Together these proposals will contribute to the creation of ecological green corridors throughout the County.

New opportunities could also include the Ely Arch Park upgrade (Rathfarnham - close to Dodder greenway), and an amphitheatre performance area in Sean Walsh Park (Tallaght) and upgraded Dublin Mountains trail head.

Ensure that key locations across the County have the necessary infrastructure to support a varied and attractive range of events. South Dublin already plays host to a varied range of sporting and cultural events. To broaden the County's appeal to event organisers (particularly those seeking to appeal to a Dublin-regional audience, but constrained by the event space offer in the city), we will ensure that key event locations across the County have the necessary infrastructure to be able to cater to greater numbers of visitors, and that these visitors are encouraged to stay beyond their visit to the event itself. This includes facilitating new event spaces where required, enhancing parking and public transport connections, walking and access routes to parks, grounds and stadia as well as supporting the development of the variety of related services (such as dining and entertainment) that visitors can enjoy.

	Action	Lead	Support	Timeline	KPI
1.1	Activation and marketing strategy for Dublin Mountains Visitor Centre to include consideration of potential for operation as an environmental/outdoor education centre, with interpretation regarding the stories of the mountains: biodiversity, geology, climate change, archaeology. This will become the primary hub for the Dublin Mountains. (see also action 4.10).	SDCC	Coillte DMP	Short	Activation and marketing strategy for Dublin Mountains Visitor Centre completed
1.2	Commission a Bohernabreena Reservoir Tourism Feasibility Study to assess opportunity for on and off water universally accessible activity centre to include small café, toilets abilities, wayfinding signage and trail enhancement.	Irish Water	SDCC DMP Private sector service provider	Feasibility Study – Short Implementation - Medium	Feasibility study completed
1.3	Undertake a Lucan House Opportunity Study – following acquisition of Lucan House by SDCC an opportunity study would evaluate the opportunities for this important place, which can be a key hub for Lucan. This could include opportunities to operate as a visitor centre, watersports centre, business centre, community use or a combination of these. This would take place in the context of the positioning of Lucan as a visitor destination, with €3 million village works at three locations in 2023, linkage to the Grand Canal Greenway and potential redevelopment of Lucan schoolhouse commencing in 2024. A variety of further measures are proposed in the Lucan Tourism Product and Proposition Plan including a heritage trail (see action 3.1).	SDCC	Local community	Short-medium	Lucan House Opportunity Study completed
1.4	Completion of the Tallaght Heritage Centre with engaging interpretation showcasing the history and heritage of Tallaght and based on stories provided by the local community of South Dublin. This will be a key part of Tallaght Cultural Quarter including the existing Civic Theatre, and Rua Red and the County Library providing a distinctive visitor experience. Supported by investment in a public transport interchange (Mobility Hub) and new public square adjacent to Rua Red and the Civic Theatre.	SDCC		Short-medium	Completion of Tallaght Heritage Centre
1.5	Development of Rathfarnham Castle Stables and Courtyard – development of a mixed-use hospitality / retail / food and / or lifestyle offering as a key hub for the Rathfarnham area with potential for linkages to the Dodder Greenway.	SDCC	Third Party service provider OPW	Medium	Rathfarnham Castle Stables and Courtyard completed
1.6	Feasibility study for a significant new multi-purpose South Dublin Conference and Events Centre to include state of the art conference facilities, and 500+ seat venue. Feasibility study to consider a range of site opportunities and market assessment. Sustainability in construction and operation, and direct linkages to public transport must be key considerations.	SDCC		Short-medium	South Dublin Conference and Events Centre Feasibility Study completed

	Action	Lead	Support	Timeline	KPI
1.7	Completion of the 12th lock HUB Area Plan to include feasibility assessment with potential for phased development of hostel, restaurant / café, bike rental, exhibition space, artists' studios, kayaking club. This can act a key attractor at this point on the Grand Canal, with linkages to Dublin City, Adamstown, Lucan, Clonburris.	SDCC	Waterways Ireland	Medium-long	Completion of phased development of the 12th Lock proposals
1.8	Seek to identify catalytic tourism opportunities for the City Edge area with potential projects including an exhibition/performance space or the possibility of linking the greenway with recreation centre of scale.	SDCC		Long	Tourism opportunity identified for the City Edge area
1.9	Review of Clondalkin Round Tower management model with an increased commercial focus linked to achievable visitor targets; temporary Displays/lectures/events, and new linkages to the Grand Canal Greenway (see actions 1.11 and 3.4). This will in combination build on public investment and reinforce the role of Clondalkin Round Tower as a hub for the village.	SDCC	Fáilte Ireland	Short	Review of Clondalkin Round Tower management model completed and recommendations implemented
1.10	Explore opportunities, in partnership with UE and DCC and DMP, to maintain and improve access to the amenities and walking and cycling routes in Bohernabreena Reservoir , that link to the Dodder Greenway and are along the route of the Dublin Mountains Way.	SDCC	Uisce Éireann DMP DCC Local landowners	Greenway extension - medium Implementation - Long	Opportunities for recreational and amenity improvements are explored with relevant stakeholders and developed where appropriate.
1.11	Explore the opportunity to provide a walking trail link to Dublin Mountains Visitor Centre subject to local landowner agreement. Key project to link Dublin communities to the Dublin Mountains and encourage active travel access.	SDCC	Uisce Éireann Coillte Local landowners	Greenway extension - medium Implementation - Long	Walking route link from Bohernabreena to Dublin Mountains Visitor Centre
1.12	Completion and enhancement of Grand Canal Greenway in South Dublin County to include: • 12th Lock to Hazelhatch section. • 12th Lock to Lucan Urban Greenways through Griffeen Valley Park as a key element of the Canal Loop Greenway. • Upgrade to existing section from Blackhorse to 12th lock to include repair of surface, lighting, signage and bins, removing graffiti, removing kissing gates, increased bin cleaning. • Opportunities for cafes and accommodation.	SDCC	Waterways Ireland Fingal County Council (FCC) National Transport Authority (NTA)	Ongoing	Grand Canal Greenway completed Canal Loop Greenway completed
1.13	Enhancement of Grand Canal Greenway in South Dublin County to include linkages to Clondalkin Round Tower, to include consideration of tourism Clondalkin, and having regards to Clondalkin Local Area Plan.	SDCC	NTA	Ongoing	Linkages from Dodder Greenway to nearby attractions
1.14	Liffey Valley Recreational Enhancements Feasibility Study for a Liffey Greenway from Lucan House to St Catherines Park.	SDCC /FCC / DCC	NTA	Medium to long	Short-Medium for feasibility assessment
1.15	Assess tourism opportunity within Palmerstown Architectural Conservation Area at Mill Lane which has the potential to enhance visitor access and progress connectivity initiatives for sustainable walking and cycling routes along the Liffey Valley.	SDCC	FCC	Medium	Medium for feasibility study

	Action	Lead	Support	Timeline	KPI
1.16	Progressive enhancement of the Dublin Mountains Way (DMW) through progressive increase in the proportion off-road subject to landowner consent.	SDCC / Dublin Mountains Partnership (DMP)	Coillte Local landowners	Ongoing	Annual increase in the proportion of DMW off-road
1.17	Feasibility assessment of potential for development of long-distance mountain cycle touring routes , building on good practice in Mainland Europe.	SDCC / Dun Laoghaire - Rathdown County Council (DLRCC) / Wicklow County Council (WCC) / Coillte	-	Medium to long	Mountains cycle touring routes feasibility study completed
1.18	Rathcoole-Saggart and Brittas area. Review of Slade Valley Heritage Trail proposal to include engagement with landowners. Consider opportunity to include proposals with regard to Coillte walks in the area, subject to Coillte agreement.	SDCC	Rathcoole Tidy Towns	Long	Slade Valley Heritage Trail proposal reviewed
1.19	Liffey Valley Seek opportunities to improve animation and interpretation in the Liffey Valley. Seek opportunities to improve linkages between existing parks and open spaces , where direct off-road access is not feasible improvements should be considered along existing routes e.g. improve walking and cycling environment and facilities beside existing roadways and in parks, improve signage and create walking trail apps.	SDCC /FCC	FCC	Medium to long	Opportunities for enhanced linkages, animation and interpretation identified for Liffey Valley corridor
1.20	Increase availability of alternative forms of visitor accommodation in South Dublin to include: Assess the potential to develop of a network of motorhome parking locations at key visitor hubs (for example Tallaght, Lucan) and potentially Coillte sites subject to agreement. This should be part of a Dublin Regional approach to provide an integrated network of motorhome sites at locations and where possible in proximity to public transport corridors. Refurbishment of Camac Valley Motorhome and Camping Park as outlined in the Corkagh Park Masterplan. Explore feasibility to expand the accommodation range and quality at Camac Valley. Feasibility assessment for provision of glamping units at appropriate locations in the County.	SDCC	DLRCC FCC DCC Fáilte Ireland	Short - medium	Sites identified for motorhome parking
1.21	Carry out a masterplan for Tymon Park, Griffeen Park and Dodder Valley Park. Consider the potential for the development of additional enhanced outdoor activity offers at these locations, subject to agreement and funding.	SDCC		Medium-long	Masterplan for Tymon Park, Griffeen Park and Dodder Valley Park completed

Strategic Priority 2 - Redefine our reputation

While South Dublin boasts outstanding natural assets and attractive built heritage, the County as a whole does not yet enjoy the same level of recognition as other, more distinctive destinations in Ireland. According to Fáilte Ireland, the County has ‘emerging domestic market recognition’ and may be perceived by international visitors as being a suburb of Dublin city. While this in itself is not necessarily a problem (in terms of international marketing, South Dublin lies within the Dublin Region, under the Dublin Surprising By Nature experience brand) it is important that both locals and potential visitors have well-rounded, positive perceptions of the County as a place to live, work in and visit.

With Fáilte Ireland developing marketing collateral for the Dublin Region it makes sense for South Dublin County Council to leverage this investment rather than investing in separate marketing material for the County. South Dublin’s experiences and places should be promoted rather than South Dublin as a distinct brand. This is because visitors generally see Dublin as a whole, and not as a series of specific counties.

As with other counties across Ireland, the reputation of South Dublin is based on a whole range of factors beyond the County’s ‘postcard attractions’. It can also be shaped by messages that prevail in the media and in popular culture. Unfortunately, messages relating to South Dublin and some of its communities have not always been positive, and this creates an obstacle to overcome when seeking to improve the overall reputation of the County as a place to spend time in.

Yet South Dublin, with a growing population (also one of the youngest and most diverse populations) in Ireland, a thriving cultural and arts scene and excellent transport connections to Dublin city centre has many reasons to be proud. This is important, since trend research for this strategy shows that travellers increasingly value diversity and inclusion; they are also keen to go ‘off the beaten track’ and explore less obvious destinations as a key to understanding the local culture and way of life, and, as the pandemic has shown, they are also open to seeking out engaging experiences closer to home.

As increasing numbers of people move to the County (associated with major house building programmes and inbound migration to Ireland), the size of the local market would subsequently increase which in return creates an important need for social cohesion; helping communities to get to know and understand each other, create space for communities to celebrate their identity and assimilate. This all helps to generate ‘pride of place’; a critical sentiment if local residents are to become the best ambassadors for their own area and help to attract visitors from beyond the local community, all in a way that can achieve far more lasting impact than any single marketing campaign.

It is critical therefore that in the coming years, this tourism strategy leverages the County’s most attractive assets (its landmarks, attractions, people and events) with the active participation of local residents in crafting a new narrative about the County as a safe, diverse and welcoming, family-friendly place with a varied leisure offer and unparalleled access to Dublin’s outdoors.

In summary, **enhancing South Dublin's reputation** will include:

Nurture residents' pride of place by bringing local communities and the wider county together through themed events and place activation. The history of South Dublin; be it the history of its people, businesses or cherished locations is best told by our own people; whether as tour guides, teachers or community ambassadors. Therefore, facilitating partnerships between the County's vibrant creative arts sector, its attractions and our many diverse communities will help to build familiarity among local communities about the full range of attractions and experiences that we offer. Volunteer programmes and events can also support this. The overall aim is to articulate our County's modern-day personality in a very organic and authentic way that will resonate nationally and internationally.

Maximise the use of existing arts venues, theatres, parks and stadiums with a varied and distinctive range of events and programmes that attract visitors from both within and outside the County. The success and return on investment brought by the South Dublin Tourism, Event and Festival Grant shows that eye-catching events in our County have the ability to generate a positive return on investment and familiarise a wider audience with what we have to offer. The year-on-year growth and diversification of the Red Line Festival, taking place across the county has also put a spotlight on our varied cultural offer and has attracted audiences from far beyond South Dublin.

Given that South Dublin County has some of the key cultural centres

in Ireland such as Rua Red, Civic Theatre Tallaght, and Aras Chrónáin Irish Cultural Centre -as well as larger venue such as Tallaght Stadium and the National Basketball Arena, South Dublin should seize the opportunity to become a leading host of cultural events by combining purpose-built event facilities with an expanded food and beverage offer.

Furthermore, by becoming more creative about the way we use public spaces such as parks, gardens and squares and suitable areas within the Dublin Mountains (and supporting it with necessary infrastructure such as adequate toilets, parking and spectator access), we can also expand our capacity for eye-catching events that engage the community and encourage people to meet and interact. Successful event management will require a concerted effort between SDCC, the cultural sector, community groups, local residents (who may be affected), and hospitality businesses who could be encouraged to provide event services. This would require coordination and resource investment.

Continue South Dublin's improvements of gateway entry corridors, upgrading the landscape and visual amenity of main routes through the county.



Support external communications with key partners such as Fáilte Ireland to help domestic and international visitors understand why they should visit South Dublin through development of itineraries and familiarisation visits, and provision of information on new attractions.

With the Dublin Mountains due to form a major part of the region's international appeal (as facilities are developed there, guided by a future *Dublin Mountains Destination Experience Development Plan*), it will be essential to position South Dublin as the gateway to the Mountains; both in terms of offering high quality experiences and easy access to the mountains (that is, fulfilling this promise), and in the way the County's broader offer is communicated.

The same applies to the County's expanding network of greenways along major access corridors to the city. SDCC will play a vital role as partner to national bodies such as Fáilte Ireland in order to help curate the County's offer for the national and international travel trade, arrange media visits and advise on new tourism projects and project completions.

	Action	Lead	Support	Timeline	KPI
2.1	Spread awareness about South Dublin experiences. This should be done as a two-step approach. 1, spreading information to the locals in the County and surrounding areas. Work with local attractions to curate itineraries and combinations of attractions which are then disseminated throughSDCC's own communications channels (and touchpoints with local residents), as well as the local media. Local residents can be encouraged to share their own experiences of days out through social media, helping to create a buzz, as well as a ready source of user generated content which can be then used to attract visitors from elsewhere in Ireland and overseas. 2, information dissemination among tourists. There are several entry points for tourists such as bus station and airport. All these points along with information kiosks of tourist attractions in other parts of Dublin could be used to hand out attraction details for South Dublin. Online Travel Agencies (OTAs) could be encouraged to package South Dublin County specific day tours once the offer has been further developed.	SDCC	Fáilte Ireland	Ongoing	Increase in website traffic to www.dublinoutdoors.ie Increase in visitor numbers to attractions
2.2	Review existing and identify new opportunities to activate public spaces including parks and public squares through participative and specialist events for example: • Food and craft markets for example in new public square in Tallaght town centre, Lucan House (see action 1.3) • Establishing feasibility of holding music events in Tymon Park, Corkagh Park, Lucan House • Niche specialist events such comics / Lego / culture / sport • Seasonal events such as illuminated trails and ice-rinks	SDCC	Event promoters	Ongoing	New opportunities to activate public spaces identified
2.3	Identify, encourage and support new participatory multi-day sporting events that showcase the scenery of the Dublin Mountains for example: • Dublin Mountains Cycle 100km / 200km, • Bohernabreena Tri-athlon (see action 1.2) • Link sporting events to evening cultural events and festivals to capture overnights revenue	SDCC	Event promoters	Ongoing	New participatory multi-day sporting events established

	Action	Lead	Support	Timeline	KPI
2.4	Continue to support existing distinctive South Dublin festivals including the Red Line Festival and Mother Tongues Festival. Seek to attract and support new festivals to the County that will help to enhance the reputation of the County such as brining Tradfest events to South Dublin (now in Dublin City and recently extended to Fingal). Consider working with our cultural partners such as the Civic Theatre to develop unique festivals and/or events of note.	SDCC	DCC FCC Event promoters Civic Theatre	Ongoing	Existing festivals supported Tradfest attracted to South Dublin venues Opportunity or join Dublin Region events explored
2.5	Continue partnership with national bodies such as Fáilte Ireland to help curate and promote the County's offer as a key part of the Dublin Region, including . development of itineraries for online promotion, provision of information on new attractions, and facilitating/enabling familiarisation visits.	SDCC	Fáilte Ireland	Ongoing	South Dublin's tourism offer promoted as part of the wider Dublin Regional offer
2.6	Engage the local community through volunteer programmes (see action 1.1) and as part of a Dublin Champions initiative.	SDCC	Fáilte Ireland Coillte Local community	Short - medium	Volunteer programme established Dublin Champions initiative initiated

Strategic Priority 3 - Reinforce connectivity

In order to ensure that visitors stay longer in South Dublin and get the very most from their visit, it will be essential to bring our attractions and experiences within easier reach of visitors. In many respects, the County as a whole is well catered for by public transport, being served by both rail and bus routes. The LUAS Red Line route has terminus points at Tallaght (within reach of the Dublin Mountains) and Saggart. The South-Western commuter train services also serve various communities in the County, while there are several bus lines from the County to the city centre, primarily operated by Dublin Bus and Go Ahead.

However, while there is good connectivity to and from Dublin city centre:

- » There is a lack of direct transport links with main areas of attraction in the Dublin Mountains from Tallaght and Dublin city centre.
- » There is a lack of linkages from Dublin City Centre to Palmerstown - Lucan along the Liffey Corridor, as well as Palmerstown and Farnleigh.
- » There is limited bus connectivity between the towns and villages of the County and to other areas, such as Dún Laoghaire-Rathdown and Fingal.
- » Many other attractions within the County are only accessible by private car.

Given that car rental is an expensive and impractical option for many visitors (especially those planning only to stay in Dublin), we must give them the tools to be able to travel independently, with confidence in and around the County, thereby increasing the attractiveness of South Dublin as a realistic place to reach in a

reasonable amount of time from the city centre. Once in the County, visitors should be able to navigate between key places of interest with ease.

As the South Dublin County Development Plan 2022-2028 makes clear, use of public transport should be promoted in a holistic way, together with increased walking and cycling. By developing public transport routes that connect well with popular walking and cycling routes, we can make active travel a far more attractive prospect, and open to visitors with different levels of physical mobility and with different amounts of time to spare.

Following the example of destinations around the world that have tackled the challenge of providing public transport in rural locations, it will be important to explore a range of options that will provide convenience and value for money, such as shuttle services at popular times of year, hail-a-ride buses, and integration with e-bike charging points.

We also recognise the ongoing need to make the Dublin region's public transport system more user-friendly for visitors, for example by providing integrated ticketing, making maps, routes and stops much clearer, as well as ensuring that visitors know how to get real-time information about their journey. It will also be important for visitors to be made better aware of what key sights and attractions lie along key routes (such as the Luas Red Line). We will work with transport operators to find ways to implement measures such as these in order to boost the attractiveness of public transport as a great option for visitors to use.

Accessibility by public transport and active travel will be a key focus for development of tourism amenities, events and public realm in South Dublin.



In summary, **enhancing connectivity to, from and within South Dublin** will include:

Develop and curate itineraries that encourage greater numbers of visitors to flow through the region and stay longer. During and since the COVID-19 pandemic, Ireland has seen a considerable increase in the number of people looking to get outside and into nature for leisure. Having a well-maintained, easily accessible, safe and navigable network of greenways - many of which are now coming to fruition - will improve local people's quality of life, while giving visitors reasons to spend longer in the county. At the first stage, it will be important to ensure that local people are familiar with these routes and use them as often as possible - for commuting and for leisure. Following the example of successful coastal and rural trails elsewhere in Ireland, it will also be important to make it as easy as possible for visitors to plan and map their visit online; and be able to easily reach facilities such as public transport routes, car parking, toilets and refreshments.

Support public transport links that will ensure visitor attractions and popular routes are well connected. Working with agencies and service providers such as BusConnects and TFI, it will be important to revise the public network route map and service provision, considering the county's expanding network of greenways, and the expected increase in demand for accessing the Dublin Mountains as new facilities such as the Dublin Mountains Visitor Centre opens in the coming years. Outdoor activity centres in the Dublin Mountains are currently constrained by the lack of public transport access.

To remedy this, services such as a 'Dublin Rambler' service, could help

link the city to key sites in the mountains and link South Dublin County with other nearby local authorities such as Dún Laoghaire-Rathdown and their associated Mountains-based attractions. It will also be critical to ensure that routes are well provisioned with supporting infrastructure, such as safe waiting areas, good signposting, bike parking, access paths and real time journey information (a good example of this will be to link the Luas terminus in Tallaght with trails in the Dublin Mountains). Furthermore, we will work together with operators of existing routes (for example the Luas Red Line) to ensure that key attractions and stops of interest along the route in South Dublin are better promoted.

Targeted interventions could enhance the connections between the Dublin Mountains Visitor Centre and the wider South Dublin County public transport connections. For example this could include new walkways and cycle ways subject to environmental and planning considerations that link the Hellfire Club and Massey's Wood to relevant bus routes.

Implement cohesive visitor interpretation and orientation signage across South Dublin as well as increasing cross-promotion of County's key attractions, parks and open spaces. By linking the County's attractions in ways that are clear and consistent for visitors and local people, we can better highlight and promote the full range of what South Dublin has to offer. This can be done by facilitating coordination between attractions, helping them to meet, learn about key developments and best practice.

From a consumer-facing perspective, building these linkages can be done in partnership with local media and national partners such as OPW and Fáilte Ireland, to help curate and promote the offer in a consistent way. We must also work on encouraging visitors to explore the County more widely by working with national partners and neighbouring authorities to implement cohesively designed signage along routes, and at key locations and integrating it with digital mapping tools, as described above).

	Action	Lead	Support	Timeline	KPI
3.1	Develop, curate and promote a range of itineraries and online trails to encourage more visitors to travel to South Dublin and to stay for longer. This includes: Exploring how to add value to existing apps through temporary trails (for example Easter hunts) or exploring Augmented Reality opportunities Development of a Lucan heritage Trail app Update existing and create additional itineraries for the Visit Dublin website. Gourmet Greenways-/ Culinary Canals to highlight the emerging food offer	SDCC	Fáilte Ireland Local communities	Short-medium	Range of itineraries and online trails developed and curated
3.2	Work with activity providers to introduce Come and Try it Days to encourage local community to participate in outdoor activities.	SDCC	Activity providers	Short-medium	Come and Try it Days trialled
3.3	Try to work with key partners to assess, develop and support a Dublin Rambler bus service that links Tallaght LUAS stop to Bohernabreena Reservoir, Footee.ie, Glenasmole, Dublin Mountains Visitor Centre, Cruagh Wood, Ziplt. Service could be developed as part of a comprehensive Dublin Mountains access service. This could include for example, linkages from Dun Laoghaire Town to Carrickmines LUAS stop, Ticknock, Zip It. This is to provide a sustainable transport option linking LUAS stops and key towns to the Dublin Mountains recreational sites and key activity providers. Consider Incorporating the ability to transport bicycles (including heavier e-bikes) either by means of exterior racks or indeed interior space within the buses. Consider opportunities for provision of for safe, secure bike parking at the bus stops along any routes and facilities such as repair stands and-bike charging options. Consider opportunities for the route to serve not just the tourist attractions in the County but should serve locations from which people access walking and cycling routes which are currently accessible only by private car. Routes selected must have supporting infrastructure, such as safe waiting areas, good signposting, bike parking, access paths and real time journey information	SDCC / NTA / DLRCC	Fáilte Ireland	Short-medium	Dublin Rambler bus service introduced with supporting infrastructure

	Action	Lead	Support	Timeline	KPI
3.4	Support a proposed multi-agency led assessment of visitor interpretation and orientation signage across the Dublin Region to ensure a common and integrated approach. This should extend to a common approach for branding and design of signage and interpretation for Greenways, Blueways and walking trails so that the visitor experience is seamless across the Region. Consideration to be given to integration of wayfinding with a common digital mapping and promotion of trails for the Dublin region.	SDCC / FCC / DLRCC / DCC / NTA	NTO	Medium	Multi-agency led assessment of visitor interpretation and orientation signage undertaken and recommendations implemented
3.5	Work with private sector provider and key partners to introduce EV charging infrastructure at key sites.	SDCC	Waterways Ireland Irish Water	Short	EV charging at key sites introduced



Strategic Priority 4 - Regenerate our natural spaces

With many of South Dublin's major visitor experiences still in development, there is an opportunity to set an example nationally by ensuring that all development under this strategy is carried out in a way that considers the visitor, industry, community, and the environment (VICE).

The environmental component is particularly critical here; since the publication of the previous 2015-2020 South Dublin Tourism Strategy, addressing climate change and the long-term sustainability of tourism has become of critical importance, not only in South Dublin but in destinations around the world. Changing seasonal conditions and extreme weather have shown their capacity to disrupt everyday life, overseas and closer to home. It is understandable therefore, that consumers are also showing increasing levels of concern about the impact of their travels on the climate and are keen to find ways to minimise their impact or contribute to sustainability projects.

One of the key areas of focus on taking climate action will be around **transport**. Given that transport is the third largest source of carbon emissions in Ireland, it will be essential to ensure that we make walking, cycling and public transport the most practical and attractive options for visitors to use. This will be especially important in areas of the County which are attractive for visitors but unable to handle large volumes of traffic, such as the Dublin Mountains. Where private transport by electric vehicles is used, we must make sure that EV charging stations are clearly

signposted and available for use at key tourism attractions.

The same applies to the social impact of tourism; over-tourism is no longer a phenomenon that affects cities only. Without adequate planning and visitor management, rural locations can quickly become overrun, negatively impacting the lives of local people and causing damage to the local environment. Given the strongly nature-based component of South Dublin's tourism offer, it will therefore be essential to ensure that the County's natural assets are not only protected (and the negative impacts mitigated) but actively nurtured so that they can be enjoyed by future generations of local communities and visitors.

This makes adopting a regenerative approach to tourism particularly relevant to South Dublin. While **sustainable** tourism is about minimising tourism's negative impacts and doing less harm to a place's people and nature, **regenerative** tourism refers to revitalising a place and leaving it in a better state than before (by bringing net benefits to the places' people and nature) so the place can thrive and flourish. Pursuing regenerative growth is an approach that is rapidly gathering pace around the world.

By embracing a regenerative approach to tourism development - particularly in rural areas such as the Dublin Mountains, South Dublin can play an active, meaningful and exemplary role in revitalising local economies, preserving biodiversity, and supporting Ireland's Net Zero carbon ambitions. Examples of using regeneration to address the climate emergency include rewilding, and ecosystem restoration and reforestation. Prioritising "nature-based solutions" such as these restoration projects can deliver multiple benefits to residents as well as to visitors in the region, not only in terms of carbon sequestration, but also enhanced biodiversity, improved air and water quality, and helping to create landscapes and ecosystems that are more resilient to climate change. South Dublin's parks have an unusual range of flora which is thriving

within the meadowland programme underway and there are opportunities to contribute to visitors understanding and appreciation through provision of information and events.

Regenerative tourism is not only about tourism's contribution to nature restoration. It is also about reviving and strengthening local communities and their unique culture through providing direct support to the local economy and helping it thrive. Through unique experiences such as participating in local cooking workshops, art workshops, food and drink tasting, or storytelling walks and hikes, regenerative tourism can support skilled artisans, artists, designers and guides to continue their craft and make the residents' proud of their local heritage - of direct relevance to Strategic Priority number 2 described earlier in this document. Visitors' growing interest in enriching encounters with local people through, for example, 'farm to fork' experiences or participating in local festivals and events provides another opportunity for South Dublin's communities to benefit from tourism, at the same time delivering memorable, authentic local experiences for guests that cannot be experienced anywhere else.

During the lifetime of this strategy, sustainable and regenerative practices will continue to grow and evolve rapidly - while the need to ensure responsible practices among businesses, visitors and local residents will continue to grow. South Dublin County Council will need to play an increasingly important role in implementing rigorous visitor management in popular locations, ensuring that visitors and locals are well informed about their responsibilities, and supporting tourism and hospitality businesses in reducing their impact on the environment.

In summary, **championing sustainability and prioritising a regenerative approach to tourism** will include:

Ensure that South Dublin's tourism businesses have access to support, guidance and funding that aids the transition towards sustainable operations.

With state level and European funding becoming progressively structured around taking climate action and supporting businesses on a transition towards sustainable operations, it will be important to ensure that tourism and hospitality businesses across South Dublin are able to access this and start their climate action journey if they have not already done so. We will therefore coordinate closely between national partners such as Enterprise Ireland, Fáilte Ireland and Skillnet Ireland to ensure that tourism and hospitality businesses across South Dublin of all sizes are aware of, and have access to support, guidance and funding related to climate action, in areas such as climate and circular economy strategy development, tracking and monitoring of emissions, accreditation schemes, staff training and upgrading facilities.

Champion good practice in sustainability and accessibility among local businesses, and curating this for visitors and tourism sector partners.

Given that South Dublin County Council engages with businesses across a wide range of sectors, the Council able to help businesses share knowledge on best practices in crucial areas. Increasing numbers of consumers are keen to buy from those businesses which are taking their climate actions responsibilities seriously, while tour operators are introducing action on sustainability as part of their criteria for working with local suppliers. Consequently, SDCC can work with national partners such as Fáilte Ireland who work with the travel trade, to curate a 'sustainable offer' in South Dublin, and help visitors become aware of how to reduce the environmental impact of their journey before and during their visit to the county. Ensuring tourism attractions, activities and accommodation utilise principles of universal design and are accessible to all where possible is important to ensure inclusion.

There are several examples of good practice in the County including Camac Valley Tourist Caravan and Camping Park with accessible showers, toilets, kitchen and laundry room, and Clondalkin Round Tower for accessibility and the sensory garden. Examples of good practice should be highlighted and championed.

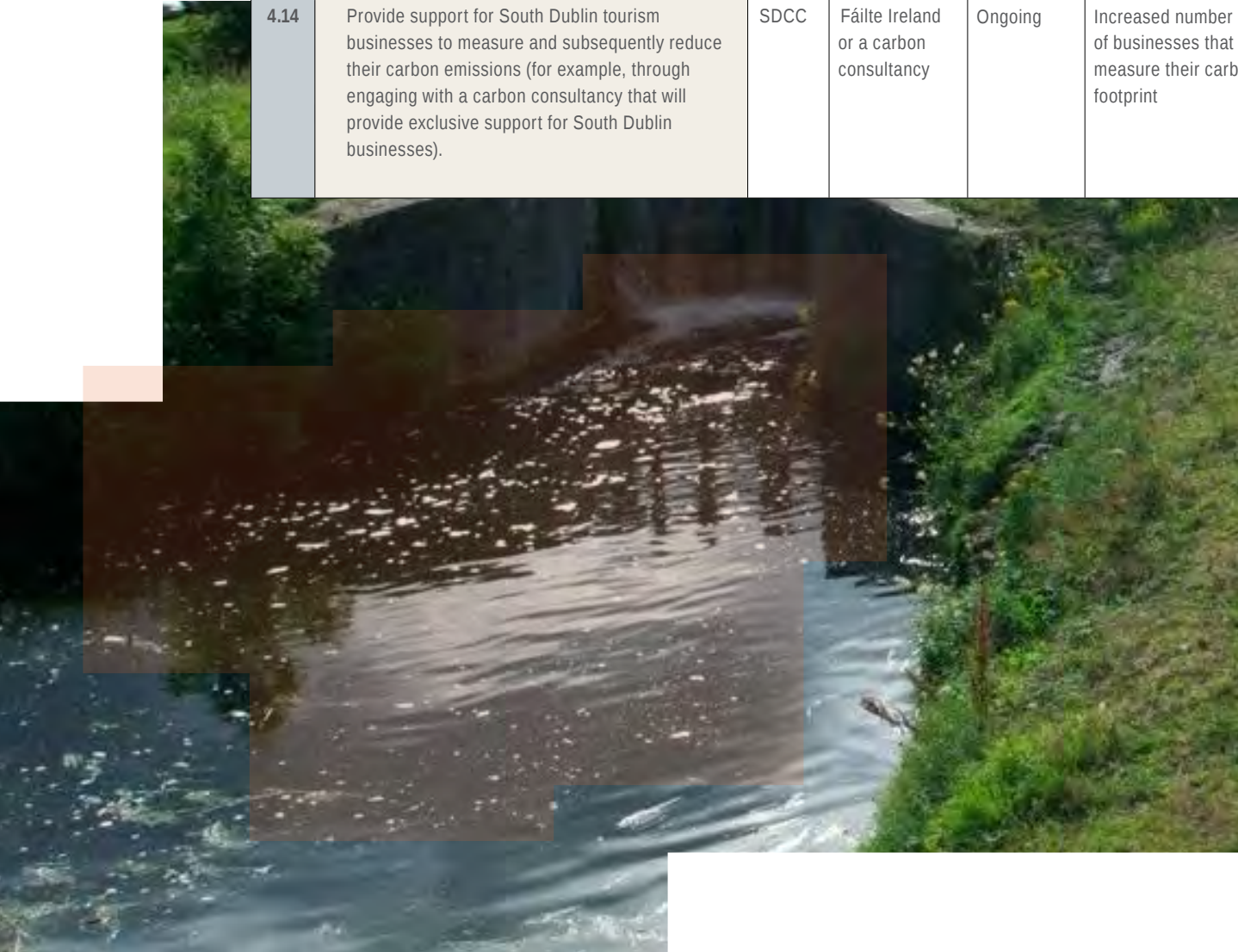
Keep communities involved and consulted on major tourism developments. As the residents' survey conducted for this strategy project showed, the residents of South Dublin value highly their access to nature and green spaces, and are keen to see these protected, for the benefit of both residents and visitors. While the survey (the first of its kind conducted in the County) showed overall support for attracting more visitors throughout the year, particularly from elsewhere in Ireland, we must work to ensure that support remains high, firstly by managing tourism in the county responsibly, and secondly by consulting residents on tourism-related developments that may affect them. This should include periodic surveys of resident sentiment, as well as specific consultation activities such as surveys, workshops and town halls).

Nurture regenerative tourism experience development in the County. Regenerative tourism is an area undergoing fast evolution with local-level projects being introduced across Ireland in recent years. Given the nature-based approach to tourism development, South Dublin can go further by pioneering the introduction of localised, regenerative tourism experiences which broaden the value contribution of tourism to the region. This could include areas such as restoring and rewilding landscapes, environmental education, wildlife protection and community gardens. This is consistent with the 'Nature-Based Solutions' action area of the SDCC Climate Action Plan 2019 - 2024; which includes supporting the sustainable management of the Dublin Mountains; creating tree trails and wetland habitats in public parks; planting trees; creating and expanding community gardens for local food production and nurturing biodiversity. From a tourism perspective, SDCC can help with aspects such as by facilitating education about regenerative tourism among local tourism stakeholders, guiding organisations wishing to make funding and planning applications, providing land for regenerative projects and encouraging community and visitor participation.

	Action	Lead	Support	Timeline	KPI
4.1	Engage with Fáilte Ireland to establish Enterprise Supports and Business Activation Workshops for existing and potential businesses along the Dodder Greenway corridor and the Grand Canal Greenway Corridor.	SDCC	Fáilte Ireland	Ongoing	Enterprise Supports and Business Activation Workshops established for existing and potential businesses along the Dodder Greenway corridor and the Grand Canal Greenway Corridor
4.2	Encourage new food businesses to become established in South Dublin through incentives such as business support schemes for example those provided by the Local Enterprise Office for example, Priming and Business Expansion Grants, Feasibility Grant and Green for Business Grants.	SDCC		Short - medium	Increase in number of cafes and restaurants in South Dublin Development of food trails and experiences.

	Action	Lead	Support	Timeline	KPI
4.3	Seek to encourage existing and new tourism businesses in South Dublin to operate more sustainably through support / funding to participate in national training/accreditation schemes.	SDCC	Sustainable Travel Ireland Green Hospitality Ireland	Ongoing	Funding provided to encourage tourism businesses to participate in national sustainability training/accreditation schemes.
4.4	Identify and encourage good practice in ensuring tourism related businesses including accommodation providers, attractions and activities are accessible for all. Promote best practice examples of exemplar businesses. New businesses to be provided with detail on universal design and making heritage sites more accessible. ⁹	SDCC		Ongoing	Record numbers of, and promote, tourism businesses meeting minimum accessibility standards
4.5	Ensure that resident sentiment on tourism is monitored in periodic council surveys.	SDCC	Local community	Ongoing	Resident sentiment periodically monitored and results taken into account
4.6	Support existing or new local tourism committees in key settlements in South Dublin as fora for engagement.	SDCC	Local community	Ongoing	Existing or new local tourism committees supported
4.7	Consider setting up regenerative tourism working group with local and national partners, to map activity and identify where SDCC can support.	SDCC	DLRCC, WCC, Coillte DMP	Short	Regenerative tourism working group established
4.8	Support transformative regenerative initiative in the Glenasmole Valley area – Glenasmole Restoration project.	SDCC	NPWS	Ongoing	Glenasmole Restoration project
4.9	Support creation of a Regeneration Centre in the Dublin Mountains (as part of Dublin Mountains Visitor Centre) that would run environmental education activities for residents and visitors and support biodiversity restoration initiatives in the mountains.	SDCC		Short-medium	The Regeneration Centre created within Dublin Mountains Visitor Centre
4.10	Consider cooperating with a regenerative tourism expert to create content and / or training for businesses on the benefits of regenerative tourism, with benchmarking examples of regenerative tourism experiences for inspiration.	SDCC	Regenerative tourism consultant Sustainable Travel Ireland	Short-term	Content created. Increased number of South Dublin businesses using the content

	Action	Lead	Support	Timeline	KPI
4.11	Incentivise businesses to create regenerative experiences for visitors (authentic and unique to the place) through funding and marketing support.	SDCC	Fáilte Ireland	Ongoing	Increased number of businesses offering authentic, place-based experiences for visitors
4.12	Explore potential partnerships between SDCC, tourism businesses and environmental organisations to create nature-based experiences for residents and visitors, such as rewilding or tree-planting in the Dublin Mountains.	SDCC	Environmental NGOs and other organisations	Ongoing	Number of nature-based experiences created
4.13	Signpost South Dublin tourism businesses to Fáilte Ireland's user-friendly Climate Action resources , such as the carbon emission calculator, climate action roadmap, or guides on energy, water and waste management.	SDCC	Fáilte Ireland	Ongoing	Increased number of South Dublin businesses using the resources
4.14	Provide support for South Dublin tourism businesses to measure and subsequently reduce their carbon emissions (for example, through engaging with a carbon consultancy that will provide exclusive support for South Dublin businesses).	SDCC	Fáilte Ireland or a carbon consultancy	Ongoing	Increased number of businesses that measure their carbon footprint



Strategic Priority 5 - Refresh partnership working

Successful delivery of the Strategic Priorities set out in this strategy will require the participation of a wide range of public and private sector stakeholders. In comparison to the previous edition of the South Dublin Tourism Strategy, the development of new sites, as well as an intensified focus on areas such as community engagement and climate action will require us to work with stakeholder groups beyond the tourism and hospitality sector. As a first step, it will be important for residents and the wider business community in South Dublin to understand the contents of this new strategy, and the opportunities that it implies for the coming years.

Tourism presents a significant and expanding economic opportunity for South Dublin County. Investment in new attractions must take place with investment in resourcing for management and delivery of tourism in the county. It is essential that further resourcing is provided for the management, coordination and promotion of tourism in the county.

It is imperative that an operating model is identified that is viable, sustainable and effective to ensure visitor attractions in South Dublin are effectively managed over the coming years. There is a risk that not doing so would result in a poor economic return on public investment and an impact on South Dublin County Council's reputation. While models such as charitable trusts have been employed elsewhere with success Fáilte Ireland are currently updating guidelines in this regard.

Since the dissolution of the South Dublin Tourism Company in 2014,

South Dublin has lacked a multi-stakeholder body that could champion tourism development and promotion in the County, and work with the County Council to represent tourism businesses and coordinate between them. The creation of this strategy presents an opportunity to remedy this, and to secure the support of key partners who will support its oversight and implementation in the future. Such a body could help the County's stakeholders to adapt to new challenges and opportunities as they arise and ensure that the strategy's implementation is aligned with national policy priorities too.

There are multiple agencies involved in the delivery and management of tourism in the Dublin area. Working together can harness significant collaborative power to drive tourism development. It can also ensure that the Dublin Region offer is more cohesive encouraging visitors to stay for longer in the Dublin area.

It is imperative that decision-making is informed by a data-driven and evidence-based approach. This will enable patterns and trends to be identified and to ensure that investment is targeted to markets and opportunities that will be of benefit to South Dublin County and the wider Dublin region.

In summary **developing more effective governance and coordination** will include:

Establish optimum delivery and management mechanism for SDCC for an expanding visitor asset portfolio and festivals and events programme. Over the course of the tourism strategy there will be a range of new attractions developed in the County including Dublin Mountains Visitor Centre, 12th Lock Hub, Tallaght Heritage Centre, and Lucan House. Based on recent research into good practice in this area an optimum management model will be identified for South Dublin County Council. It is recommended that this includes increased operational and capital resourcing commensurate with increased responsibilities and economic opportunity tourism presents for the County.

Ensure the tourism industry sector of South Dublin has a collective voice and can contribute to strategic tourism development decision-making.

There are many different approaches to the oversight of tourism development at a county level in Ireland. Collaboration and communication are key to harnessing opportunity and to addressing local concerns. A new tourism network for South Dublin with a defined term of reference, members drawn from key sectors such as accommodation, attractions, activities, community, and events, would enable greater collaboration and engagement. Local engagement is important, and the network could include community reps from Tallaght, Clondalkin, Lucan, Palmerstown, Rathfarnham, Brittas – Saggart - Rathcoole.

Build knowledge and skills among the local tourism and hospitality sector to capitalise on the potential of the County's tourism products and visitor experiences.

As investments are made in unlocking the County's assets through experiential product development, it will be critical to ensure that these investments deliver benefits in terms of increased hospitality trade and job creation, and that they benefit other related sectors too, such as food producers. For this to happen, it will be critical to ensure that the County's business community is aware of which developments are underway, the opportunities for delivering related services (such as food and beverage, accommodation, or local tours), and what this means for their customers (such as creating a stronger pitch for selling the County to visitors and locals). While agencies such as Fáilte Ireland have the primary role in skills development in the tourism sector, the Council will have an important role to play in facilitating the creation of business networks around these opportunities,

and in terms of keeping businesses informed about the emerging opportunities as different visitor facilities are developed.

Reinforce regional collaboration and synergy in tourism delivery. Building on and reinforcing existing models of collaboration is an ideal approach and can be used to broaden the discussion of tourism in the Dublin region to include the Dublin brand and promotion. The development of recreational trails is increasingly important and yet also resource intensive. With joint support a regional approach can be taken to recreational development to ensure integrated and high-quality trail development as well as the provision of information on an integrated outdoor offer. The Dublin Mountains needs a collaborative approach to ensure the development of tourism and recreation takes place responsibly. The Dublin Mountains Destination Experience Development Plan and the Dublin Mountains Partnership Strategic Plan 2022 - 2026 provide a strategic framework for this and will be supported.

Ensure evidence-based approach to tourism investment by enhancing data collection.

An evidence-based approach means better decision making. There is an increasing range of data sources available and increasingly sophisticated ways of monitoring who is visiting and when including anonymised data, footfall counters, real-time dashboards. Each local authority is ways to utilise data and a collaborative approach can support each in their individual and collective tourism development ambitions.



	Action	Lead	Support	Timeline	KPI
5.1	Undertake series of local events throughout South Dublin to launch the South Dublin County Tourism Strategy, the ambition and key projects within it to ensure residents and the wider business community in South Dublin to understand the contents of this new strategy, and the opportunities that it implies for the coming years.	SDCC		Short	South Dublin County Tourism Strategy roadshow events undertaken.
5.2	Identify and implement optimum attraction resourcing and management model for DMVC, Clondalkin Round Tower, 12th Lock, Lucan House, Tallaght Heritage Centre.	SDCC	Local community	Ongoing	Optimum tourism facility management model identified and implemented.
5.3	Explore the establishment of a South Dublin County Tourism Network with a board and defined working groups for example events & festivals, recreation and activities. Network to include community reps from Tallaght, Clondalkin, Lucan, Palmerstown, Rathfarnham, Brittas-Saggart-Rathcoole.	SDCC	Local community	Ongoing	South Dublin County Tourism Network established.
5.4	Support an expanded local authority tourism committee to a Dublin Regional Brand Steering Group to include SDCC, FCC, DCC, DLRCC, FI with quarterly meetings.	Fáilte Ireland SDCC DLRCC FCC DCC	DLRCC, WCC, Coillte DMP	Short-medium	Dublin Region Recreation officer role established.

	Action	Lead	Support	Timeline	KPI
5.5	Support Fáilte Ireland on the development and implementation of a Dublin Mountains Destination Experience Development Plan (DEDP).	Fáilte Ireland	SDCC	Ongoing	Dublin Mountains Partnership Strategic Plan implemented.
5.6	Support the implementation of the Dublin Mountains Partnership Strategic Plan 2022-2026.	DMP	Regenerative tourism consultant Sustainable Travel Ireland	Medium-long	DublinOutdoors website remit expanded to all of Dublin Region.
5.7	Seek to expand funding and remit of www.dublinoutdoors.ie to cover all outdoor activities in Dublin with funding from each local authority to provide cohesive and comprehensive Dublin information.	SDCC	Fáilte Ireland DLRCC FCC DCC	Medium-long	Data increasingly used to inform tourism policy and decision making.
5.8	Collaborate with other Dublin local authorities on a smart data approach to support an evidence-based approach to tourism delivery for example use of anonymised data, footfall counters, real-time dashboards. Require footfall counters / sensors for all new public realm improvements (for example entrances to parks, event spaces, Tallaght Stadium, visitor centres, Greenway access points). Encourage more comprehensive recording of visitor numbers and other tourism performance metrics to accurately project the performance of visitor attractions within the County.	SDCC	DLRCC FCC DCC Fáilte Ireland	Medium-long	Data increasingly used to inform tourism policy and decision making.



04 Monitoring and evaluation – (How we know we are achieving it)

4.1 Monitoring framework

A relevant monitoring framework, establishing key performance indicators (KPIs), is essential to monitor the effectiveness of the tourism performance of South Dublin County. While national agencies including Fáilte Ireland and the Central Statistics Office gather data on tourism volume and behaviour, this information is generally not available at a sub-regional level and is often not sufficiently up to date to respond to ongoing market changes. The integration of monitoring and measurement as a key part of any action plan is good practice as it helps to refine future activities to either capitalise on positive outcomes or to prevent unnecessary waste of public or private funds or time.

The measurement mechanisms recommended as part of this strategy will include both quantitative and qualitative elements to capture the success of the County in meeting the expectations of visitors and identifying how many visitors arrive, how long they stay and how much of a contribution to the economy that they make. The aim is to ensure that those involved in tourism management in South Dublin County Council have the data and understanding they need to guide plans and investment decisions.

At the same time, in line with the greater emphasis on the sustainable development of tourism being taken by destinations worldwide, a further series of metrics could be used to demonstrate progress in addressing this strategy's strategic priorities. For example, increases in length of stay (number of bed nights), spend per visitor, footfall at attractions, visitor and resident satisfaction and a more even spread of visitor numbers throughout the year can each help to

indicate that South Dublin is becoming consolidated as a more compelling destination for visitors who are finding reasons to stay longer and spend more in the County.

In identifying metrics of success, with a focus on regenerative tourism, a key consideration is that revenue growth over volume growth should be prioritised, and that metrics that benefit communities including growth of revenue from tourism bed-nights.

Metrics of success for South Dublin County include:

- Average length of stay.
- Average spend per visitor.
- Spread of footfall/bednights throughout the year (seasonality).
- Resident sentiment on tourism.
- Visitor satisfaction.
- Number of tourism businesses with national/international sustainability accreditation.
- Number of guest nights during off-season.
- Number of businesses with online booking capability.
- Number/percentage of visitors who show 'sustainable' practices, for example using public transport to visit (collected by visitor survey).
- Number/percentage of residents who believe that tourism offer adds value to them (data from resident survey).
- Number/percentage of sustainability-certified conference facilities.
- Number of new tourism businesses developed in South Dublin County over the plan period.
- Number of bookable experiences created, for example in adventure travel or at key attractions.

It is understood that not all of these metrics are currently being measured by Fáilte Ireland or tourism businesses at County level, however this underlines the importance of bringing tourism stakeholders together to explore new ways to gather and share county level data. Following the indicative survey carried out for this project, it is also recommended that a larger, more comprehensive study of resident sentiment on tourism is carried out on a frequent basis (for example every two years).

4.2 Impact targets

A baseline estimate of economic impact from tourism in South County Dublin has been provided in section 2.4. This indicated that, based on the metrics and assumptions identified, tourism is estimated to generate €137 million in revenue annually for the County, and this revenue can be expected to support 3,699 jobs based on tourism.

These figures are significantly more than the relevant metrics included in the previous tourism strategy (which estimated tourism revenue at €26 million and jobs at 2,500 in 2015, with projected growth to €62 million revenue and 4,840 jobs by year 10 (2025). However, they are a relatively small proportion of the €2.4 billion value of tourism to the Dublin region, and of the 70,000 jobs supported by tourism in the Dublin region¹⁰. A key objective should be to grow revenue and jobs based upon tourism over the lifetime of the strategy as core metrics.

The period since 2019 has demonstrated that the tourism sector

cannot rely on compound growth and must be increasingly resilient. However, for the purposes of this strategy assumptions can be made in terms of tourism growth. A supporting factor is the demonstrated intent of South Dublin County Council to invest and continue to invest in tourism and recreation infrastructure in the County, such as the Dublin Mountains Visitor Centre, Dodder Greenway and Lucan House. This creates the foundations for tourism growth and act as catalysts for new enterprise development.

Based on the metrics and assumptions outlined in section 2.4, low medium and high scenarios for growth can be considered. These are outlined in Table 4.

Medium Growth scenario envisages development of the seven pipeline tourism projects as in the Low Growth scenario, but also the seven catalytic projects identified above.¹² Most identified challenges are addressed. Some new visitor accommodation is developed including alternative accommodation as well as a new hotel.

Table 4 Tourism Growth Scenarios for South County Dublin to 2028

		revenue	jobs
2023	Baseline (2023)	137 million	3,699
2028	Low Growth (2.5%)	155 million	4,185
	Medium Growth (5%)	175 million	4,721
	High Growth (7.5%)	197 million	5,311

Low Growth scenario is based on the completion of some of the seven pipeline tourism projects¹¹, but with little growth in other new attractions, conference facilities or visitor accommodation. Some identified challenges are addressed.

¹⁰ Dublin Regional Tourism Development Strategy, Fáilte Ireland, 2023

¹¹ Development of the Dublin Mountains Visitor Centre, Upgrade of Tallaght Stadium, Completion of the €3 million Tallaght Heritage Centre, Development of Rathfarnham Castle Stables and Courtyard, Completion of the 12th lock HUB Area Plan, Completion of the Dodder Greenway, Completion and enhancement of Grand Canal Greenway in South Dublin County

High Growth scenario envisages completion of the seven pipeline tourism projects, and the implementation of the seven catalytic projects from feasibility stage to investment if deemed appropriate. All challenges that can be addressed are addressed. A range of new visitor accommodation is developed in South Dublin County including a significant increase in hotel beds.

It must be caveated that estimates and projections are illustrative only. Further research into economic impact, including the economic impact of day visitors, at a regional level would provide a more detailed evidence base upon which to base projections.

4.3 Utilising smart data analysis

Positioning South Dublin County as a smart tourism destination means using data to understand visitor behaviour and visitor patterns. This data can be gathered using a range of existing and potential infrastructure including smart sensors (typically installed in bins, streetlights and so on) and share data for analysing visitor footfall in town centres. Anonymised telecom and bank data can be used to monitor visitor flow, patterns and trends to inform decision-making. Collaboration is essential, between the owners of data and infrastructure installed to collect data, and between tourism agencies such as Into Kildare and tourism stakeholders to enable use of that data. Destinations such as Barcelona produce tourism dashboards for use by the industry to inform decision making which could be considered for South Dublin County and the wider Dublin region.

4.4 Mid-point evaluation

The impact of the Tourism Strategy should be monitored and evaluated. This can be done by examining it in terms of impact making tourism a more sustainable and regenerative form of development e.g. performance in terms of the impact on Visitor, Industry, Community and Environment. Areas of importance will comprise the following areas:

- » Economic – contribution to local economic performance, including spend in the county, increased employment in relevant sectors, such as accommodation and food, increases in new business formation etc. based on KPI's.
- » Social – increased awareness of value of local environment and engagement by local communities in tourism, based on community engagement.
- » Awareness – are visitors increasingly aware of the South Dublin County tourism offer, based on sentiment surveys, and social media/ website traffic.
- » Environmental – does tourism development lead to improved or degraded environmental performance, such as quality of protected areas or increased traffic.
- » Organisational – does the strategy enhance organisational goals, improve partnerships and networks within the County, and the Dublin Region.
- » A mid-point evaluation undertaken in 2025 will determine whether implementation of the strategy is achieving stated objectives.

¹² Bohernabreena Reservoir Tourism Feasibility Study, Lucan House Opportunity Study, Feasibility study for a significant new multi-purpose South Dublin Conference and Events Centre, Increased availability of alternative forms of visitor accommodation in South Dublin, New participatory multi-day sporting events that showcase the scenery of the Dublin Mountains, Dublin Rambler bus service, Investment in resourcing for a South Dublin County Tourism Unit.

APPENDIX 01

National, Regional and Local Tourism Priorities



Appendix 1: National, regional and local tourism priorities

Several key national strategies have been developed highlighting critical issues facing tourism industry and plans for recovery.

National priorities

At the national level, the policy statement, **People, Place and Policy - Growing Tourism to 2025** calls upon local authorities to be enablers for businesses involved in providing services for tourists and to act as primary developer of public tourism infrastructure. The Fáilte Ireland Strategy 'From Survival to Recovery', highlights the need for development to be beneficial for the Visitor, Industry, Community, and the Environment (VICE). It envisages setting out strategies for growing tourism in a sustainable manner, making Ireland an attractive year-round destination. **The Rural Development Policy 2021-2025** enlists priorities for Ireland's rural development. Increase in population and rural employment, enhanced transport network and connectivity are identified as key aims. The National **Outdoor Recreation Strategy 2023-2027** envisions to cater to the growing demand for outdoor recreation by strengthening outdoor infrastructure.

Regional priorities

At the regional level, the ambition of the **Dublin Regional Tourism Strategy** is to accelerate recovery and growth of the tourists-driven economy in Dublin. The broad objectives are to increase the visitor's duration of stay and the activities that they do on their trips in the Dublin region and to spread the tourists across Dublin in areas other than just the city centre.

South Dublin County priorities

South Dublin County's priorities are formulated as part of several action plans. **The South Dublin County Development Plan 2022-2028** pledges to strengthen the sustainable tourism initiatives of the County by developing tourism-related infrastructure and enterprises alongside existing and proposed Green Routes, Greenways, Heritage and Interactive trails, outdoor activities. It also focuses on heritage and cultural tourism by supporting restoration of heritage buildings and showcasing and promoting local arts. The South Dublin Corporate Plan 2020-2024 confirms the County's commitment to support sustainable business practice including a Green Infrastructure Network to promote activities in and around green spaces in South Dublin County.

The **SDCC Climate Action Plan 2019-2024** mentions sustainable transport as one of the priorities for the County. It encompasses developing public transport routes, designing and improving the public realm to encourage active travel and enhance sustainable transport linkages, developing cycle and pedestrian greenways, and increasing public bike facilities and public bike schemes.

The current South Dublin County Tourism Strategy details out an action plan containing programs that covered areas such as Organisation and Management, Tourism Product Development, Access and Infrastructure, Markets and Marketing, Human Resource Development and Training, and Funding and Business Support. It also talks about the constraints that South Dublin County has with respect to its suburban location and limited accommodation supply in the County. The South Dublin Tourism Strategy emphasises the requirement of promoting South Dublin County's brand.

APPENDIX 02

Key trends in tourism

Key demand trends

Trend title	Evidence / relevant statistics	Implications for this strategy
1. Close-to-home travel is not losing steam, fuelled further by rising costs and sustainability concerns.	- Irish residents took 6.6 million domestic same-day visits and 0.6 million outbound same-day visits in January - June 2022, spending €344 million and €51 million respectively Household Travel Survey Q2 2022, Central Statistics Office, Oct 2022). - Irish residents took 3.4 million domestic overnight trips in April, May and June (Quarter 2) 2022 - more than three times more than Quarter 2 in 2021 (1.0 million). The number of domestic overnight trips in January - June 2022 was 12% higher than in the same period in pre-pandemic 2019. - Holiday in a nearby country is the top travel destination preference on average, and for 45% UK travellers (Klarna Insights, 2022, A deep dive into Travel & Outdoor Activities).	- Domestic tourists will be crucial to the recovery and further prosperity of the tourism sector in South Dublin. The strategy should focus primarily on encouraging residents from Dublin to explore the South Dublin offer (likely to be the same-day visitors), followed by Irish residents (same-day, with the potential to stay overnight in South Dublin). - The UK market should be considered as one of the key international markets for South Dublin.
2. Continuing demand for active adventure, with hiking and cycling remaining the top of outdoor activities.	- Three in five consumers are planning to do outdoor activities in the coming months. Outdoor adventures have been booming since the last two years, with hiking, cycling and fishing remain the top most planned outdoor activities in summer 2022 (Klarna Insights, 2022,"A deep dive into Travel and Outdoor Activities). - Forty-eight percent of all Viator bookings were made for outdoor experiences. For American travellers, water sports activities showed 311% of growth from 2019 levels, while other outdoor activities rose 153% (HYPERLINK "https://www.travelpulse.com/news/destinations/new-2022-trend-report-finds-outdoor-experiences-still-top-of-mind.html"2022 Travel Trend Report, Viator).	- Products and services around active travel (walking, cycling) and other outdoor experiences (for example water sports and sporting events) will be core to encouraging visitors to South Dublin. - The strategy should further identify South Dublin's position as the gateway to the Dublin Mountains and identify products and actions to build upon this potential, for example collaborate with partners to improve access to the Dublin Mountains (public transport, walking and cycling routes), improve wayfinding, interpretation, orientation and visitor hubs, and better engagement with relevant stakeholders to deliver on this infrastructure. -Explore the potential benefits for South Dublin offered by Fáilte Ireland's 'Dublin-surprising by nature' marketing concept.

Key demand trends

Trend title	Evidence / relevant statistics	Implications for this strategy
3. The need for authenticity and personalisation is still strong with a desire to embrace the destination (local food, culture, people).	- 81% of travellers want to immerse themselves into the local culture; 81% want their money to go back to the local community (American Express Travel, 2022, 2022 Global Travel Trends Report). - The most popular consumer motivations for traveling were new experiences, to go off the beaten track, and to travel like a local (Adventure Travel Industry Snapshot, ATTA, 2022).	- South Dublin as a food destination needs to be strengthened and supported (through the development of great visitor experiences in food tourism, supporting food festivals and urban outdoor markets). - Heritage, cultural and events tourism showcasing and promoting local arts, music, aviation history [were an alternative location to be found than previously proposed], Irish Language customs and ways of life, concerts and events, local outdoor markets and festivals needs to be part of the core offering for both residents and visitors. - Opportunity to experience the local and authentic food, music, history, language and so on as part of the destination brand, communicated well to visitors. - Responding to trend 2 and 3- the Strategy needs to highlight the Dublin Mountains, outdoor spaces, festival and event facilities, sites of historical interest, sporting events (Tallaght Stadium) and new innovative sites and projects in development that will all add to South Dublin County as an attractive destination.
4. Travellers show a strong desire to explore new, less obvious destinations that offer unique experiences (as opposed to simply ‘following the crowd’).	- Seventy-five percent of US and 70% of UK travellers say it’s important they “see new places” when thinking about their future travel plans (TripAdvisor, 2022, Travel in 2022: A Look Ahead). - Seventy percent of American millennials and gen Zs report seeking out travel experiences that their family and friends have not heard of (Skift Travel Megatrends 2023).	- Opportunity to market South Dublin as a less obvious destination that offers unique, distinctive, local and sustainable experiences. - Making it easy to move around the County, particularly using low-impact transport (walking, cycling, public transport) needs to be part of this offering.

Key demand trends

Trend title	Evidence / relevant stats	Implications for this strategy
5. Consumers increasingly pay close attention to the way that businesses behave towards their stakeholders and demand accountability in action on climate change.	- Sevenconsumers have avoided a destination or transportation option due to scepticism that the commitment to sustainable practices was real (Expedia Group, 2022, Sustainable Travel Study). - Seventy-nine percent of trip.com customers agreed sustainable travel was vital, and 70% demanded more sustainable options and wanted travel companies to better explain and label sustainable travel products, based on a global survey of 7,705 people (Skift Travel Megatrends 2023).	- This trend puts new demands to address sustainability challenges by South Dublin tourism business and by tourism decision makers, but also provides opportunities to work on the destination's reputation as a sustainable, climate-friendly place to live and to visit -All our strategy goals to centre around sustainability and have environmental considerations. - Opportunity to develop new, low-carbon product offer and communicate it well to customers (together with promoting low-carbon access to attractions). - Support local tourism businesses in improving their communications to visitors about their sustainable offer. - Commitment to continue to support sustainable tourism businesses (through training provision and better promotion of exemplar businesses) should be included in the strategy.
6. Consumers placing greater importance on diversity, equality and accessibility.	- More than half of black travellers in the USA, 42% in the U.K. and Ireland, and 40% in Canada are more likely to visit a destination if they see black representation in travel advertising. (MMGY, 2021, Global's 'The Black Traveler: Insights, Opportunities & Priorities'). - Known as the 'purple pound', the accessible tourism market is estimated to be worth £15.3 billion to the visitor economy, with huge potential for future growth (VisitEngland, 2022). - Eighty-seven million persons in the EU have some form of disability (European Commision, 2021).	- This underlines a broader need to ensure that tourism in South Dublin is more inclusive and accessible to various groups of travellers (disabled persons, older persons, Deaf persons, those with mobility impairments and so on). This also provides an economic opportunity for South Dublin tourism businesses. - The strategy should support inclusive and accessible tourism (by providing accessible transport, accommodation and attractions, and clearly communicating the availability of the accessible tourism offer).
7. Wellness is becoming an incentive to travel, drawing on consumers' greater awareness of the importance of physical and mental health.	- The trend “Travellers are seeking more personal enrichment and wellbeing” shot up 10 points in the trends to number six (MMGY Next Factor & Destinations International, August 2021, Destination Next: A Strategic Road Map for the NEXT Generation of Destination Organizations).	As this trends goes beyond spas and healthcare and might encompass nature-based and other activities such as menopause breaks for women, regenerative yoga retreats, digital detox retreats. - Opportunity to further explore the potential of the Dublin Mountains to provide such nature-based wellness offering.

Key demand trends

Trend title	Evidence / relevant stats	Implications for this strategy
8. Tech-savvy consumers expect instant interaction and to 'click and go' when it comes to hospitality, activities and experiences.	- Quick and easy booking is important for 57% of British travellers, 46% French and 41% German, while 45% British and Germans and 54% French value lots of options to compare. (Phocuswright, 2022, Travel Tech: Creating Value and Driving Recovery). - Globally, approximately two-thirds (62%) of bookings are made directly with the service provider (Adventure Travel Industry Snapshot, ATTA, 2022). - 'Digitalisation is driving visitors to new places within destinations', and 'mobile technology replacing the hotel concierges. (Fáilte Ireland, 2022, page 22).	- This puts new demands to ensure the provision of bookable experiences that are quick and easy to book, with easy-to-navigate websites of local services providers. - This is particularly important for the adventure / outdoor segment as well as for family experiences. - Supporting seamless journeys (improved wayfinding and discovery points throughout the region, ease of navigation, bookability, accessibility) as part of the strategy.
9. Consumers are turning to the travel trade to stay within budget and to help curate complex trips easily.	-ABTA predicts a rise in bookings with trusted travel companies as part of a more conscientious approach to holiday planning, with 36% more likely to book with a travel professional now than before the pandemic. For 75%, booking with a well-known name in the travel industry will be an important part of the booking process this year (ABTA Travel trends 2023). - 1/3rd of UK consumers have already booked a package holiday abroad for the next 12 months, booking early to lock the best price for their trip (ABTA consumer sentiment research, October 2022).	This provides an opportunity to better engage with the travel trade. It underlines that consumers aren't necessarily seeking information on things to do and see only through official sources (for example local council, tourism board) but also through online platforms and paid social media advertising.
10. Bleisure travel, combining business and leisure, is on track to take over traditional business travel.	- Eighty-nine percent respondents planned to add personal vacation time to their business travel in 2022 (Travelpulse.com, 2021). - Hotels, adventure tour operators and hostel booking platforms are investing in loyalty schemes, extended-stay products, and flexible membership subscriptions to attract a returning leisure customer is on the rise. Even WeWork is seeing a faster pace of growth for flexible membership subscriptions compared to its usual office space lettings. (Skift Travel Megatrends 2023).	- Opportunity to communicate better to business visitors to Dublin to extend their business stay and explore outside of the city. - In many cases, bleisure travellers are willing to spend more on dining, entertainment and tours but for them, ease is crucial. This provides opportunities for hospitality companies in South Dublin to partner to create immersive experiences (tour packages and well-rounded excursions) as well as amenities and services tailored to the family and partners who come along.

Key supply trends

Trend title	Evidence / relevant stats	Implications for this strategy
1. The rising cost of living continues to have an impact on holiday choice and spend.	'The cost-of-living crisis is by far the single most issue that is likely to impact 2023 holiday plans' (Industry Report by World Travel Market London). 66% of UK respondents said rising cost of living prices was likely to have a serious impact that affect their holiday choice and spend, with the price of petrol being a major concern for 27%. The 35-44 age group and 45-54s are the most likely to be affected, with 73% and 72% respectively saying they are concerned about the cost of living on their travel plans.	- This provides an opportunity to capitalise on other consumer trends (outlined above) and focus on the South Dublin assets that will need to be repackaged and communicated much better.
2. Rising costs to visitors impacts the choice of travel destination with a risk to harness reputation.	- In August 2022, Tourism Ireland was warned price increases of up to 30% for accommodation could damage Ireland's image. A series of special reports on rising costs for visitors said there was continuing feedback on increased car hire and hotel costs in Ireland from trade partners across Europe and on social media. Some French operators paused Irish holidays due to pricing and capacity problems, and Spanish and Italian had reported group cancellations, and the need to divert a proportion of business to other destinations, due to accommodation availability. (Reuters Ireland , 31 Aug 2022).	- The trend is likely to impact the visitor numbers to Dublin, and subsequently, to South Dublin County. This can be mitigated by a closer cooperation with the travel trade (for example by providing more up-to-date information about the tourism offer provision in South Dublin). - As the global travel trade is changing shape (it is more agile, there are more non-traditional, specialised and more fragmented players) this will require some investment into the relationship between SDCC and the travel trade. - This requires closer working with the Travel Trade (through Fáilte Ireland who know it well and have the contacts), in order to: - Explain what SD offers and keep this information updated as new products come online. - Carry out joint promotion with Fáilte Ireland and local partners towards the international travel trade. - Host travel trade representatives from Ireland and abroad to help them become more familiar with the area.

Key supply trends

Trend title	Evidence / relevant stats	Implications for this strategy
3. The ongoing war in Ukraine has disrupted travel schedules and has also affected accommodation supply.	- In Ireland, there were about 52,000 refugees in hotel accommodation across the country in Dec 2022, with the majority staying in hotels in Dublin, Cork, and Kerry. In July 2023, the Chief Executive of the Irish Tourism Industry Confederation claimed that Ukrainian refugees have "exacerbated" the shortage of affordable hotel rooms in Ireland this summer. In Nov 2022, the media reported that concern is growing within the government that this policy will impact tourism and the hospitality sector (pubs and restaurants, particularly in tourist hotspots) in the spring and summer of 2023 unless other suitable accommodation is found.	- This highlights the unavailability of adequate accommodation levels in South Dublin. Along with the unavailability of rooms, this is also greatly inflating the cost of accommodation. - Competition in regard to Dublin City, highlights the need for South Dublin County to appear as a unique tourism offering the need for a critical mass of tourism attractions in South Dublin County to spend a day here. - The limited accommodation provision in the County is not likely to impact day visitors, but will continue to have a negative impact on encouraging more overnight visitors - Opportunities to support South Dublin SMEs in increasing private accommodation offer
4. Staff shortages and skills capability are limiting operations and restraining recovery.	- In Ireland, approximately 100,000 tourism sector jobs have been lost. The perception of the tourism sector as a career choice has further weakened as tourism is seen as being highly exposed to another pandemic. - Tourism businesses are challenged to get their online presence fit for purpose (to adapt to consumers' accelerated adoption of digital and technology in their everyday lives) which can prove difficult for already time and resource-short businesses. (Fáilte Ireland Survival to Recovery, page 9, 2021-22)	- Improving digital presence of South Dublin offer online along with easing the process of booking of accommodation and experiences through the Dublin's Outdoors site (and any others that are appropriate).
5.The growing trend of 'blended working' offers opportunities for retaining travellers for longer.	- Although it is still hard to define exactly who the blended traveller is (remote workers, digital nomads, families, people booking workcations, or corporate retreats), the remote and hybrid working pattern mean companies are investing to accommodate this. Airbnb reports its fastest growing average length of stay is 28 days or more, Marriott launched an extended-stay product called Apartments by Marriott Bonvoy, and Ennismore is adding workspaces to its full portfolio (Skift Travel Megatrends 2023). - Business trips that extended to a weekend rose from 31% in 2019 to 38% in 2022 (TripActions, April 2022, in: 'Consumer Trends: The New Face of Business Travel, State of Travel 2022 Report' by Skift Research).	As per trend 10 in 'consumer trends'.

Key supply trends

Trend title	Evidence / relevant stats	Implications for this strategy
6. Economic and climate migration is set to increase, affecting where people will live and work in cities and surrounding areas	For Dublin, like for many other cities, this means that demand for both temporary accommodation and long-term housing will grow. High living costs are likely to push students and job-starters further into the suburbs, or even to smaller towns and cities to pursue their goals. ('Exploring The Emerging Role Of The Place Making And Marketing Organisation', TOPOSOPHY for City Destinations Alliance, December 2022).	- This is connected to a more holistic, placemaking approach that will put the needs of South Dublin residents before the needs of the visitors. The migration is an opportunity to attract new business and new talent the County (good job opportunities, with fair working conditions; opportunities to improve personal wellbeing, and initiatives that boost local residents' pride of place) that should be reflected in the strategy.



