

South Dublin Tourism Strategy - Draft

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Prepared on behalf of



South Dublin Tourism Strategy



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Executive Summary

1. South Dublin possesses the natural and cultural assets, good access and business infrastructure, to establish and sustain a substantial tourism sector. Located on Dublin's doorstep, the County can reinforce its business tourism strength, and create a range of recreational and leisure attractions and activities, all within a short journey time from the centre of Dublin.
2. The County's principal resource with potential for development for tourism are the Dublin Mountains, strongly supported by the waterways, parks, built and traditional cultural heritage, towns and villages.
3. In developing its range of tourism products, it is proposed that South Dublin should create a hierarchy of developments to ensure that all areas and communities receive socio-economic benefit for the development of the sector. These will be:
 - The Dublin Mountains Park Flagship Project,
 - Clusters of attractions and activities centered on the Liffey Valley, Rathfarnham/Marlay and Tallaght, and
 - Corridors/trails/routes along the Dodder Greenway, the Grand Canal Corridor with its hub at Clondalkin, and the Slade Valley Corridor and Heritage Trail.

These primary product developments will be supplemented and complemented through development and marketing support for activities in:

- Cultural heritage development,
- Village schemes,
- MICE and business tourism,
- The food and evening entertainment provision,
- A broadened range of visitor accommodation oriented towards the interest and preferences of target market segments,
- Rural and agri-tourism, and
- Events and festivals;

and facilitated through improvements to access around the County, and public realm enhancement.

4. The development of an extensive range of attractions and activities will need to be marketed using appropriate tools on a product: market matching basis to primary segments, as follows:

Overseas

- Great Escapers
- Nature Lovers
- Culturally Curious
- Business
- Events and Festivals
- VFR

Domestic

- Connected Families
- Footloose Socialisers
- Indulgent Romantics
- Business
- Events and Festivals
- VFR

5. The Grow Dublin *Collective Strategy for Tourism Growth to 2020* represents a prime opportunity for South Dublin to establish its own identity as part of a suite of County destinations in the Dublin region, and to get the benefit of segment and activity campaigns developed through the Destination Dublin team.
6. Achievement of the many developments proposed in the strategy will depend on:
 - The establishment of professional tourism capability in the local authority – the County Promotion and Tourism Section – to implement the actions specified in the strategy, to establish a tourism database for the County (in association with Fáilte Ireland) in order to inform investment decisions, to attract funding from private sector as well as other sources, and to devise and implement marketing and promotional programmes (in collaboration with the Destination Dublin team, Fáilte Ireland and the proposed Tourism Industry Working Group),
 - The creation of partnerships both within the County with other local authority agencies, with the tourism private sector and with communities, and in a wider context with neighbouring administrations, national public sector and voluntary bodies, the national tourism agencies and, most importantly, with the Destination Dublin team through maintaining close contact to ensure the County's tourism achieves full benefit from the regional Dublin strategy.
7. There is a widespread lack of awareness of South Dublin's tourism attributes among the County's existing tourism business personnel and local residents. A structured, multi-activity programme for schools through to hotel staff using, inter alia, presentations, local media and site visits is proposed in order to enhance the sense of civic pride of South Dubliners so that they may be effective advocates and ambassadors for tourism in their County.
8. The establishment of a College of Tourism and Food at the IT in Tallaght can address both the industry's short term needs for chefs, bar staff and sales personnel, and its longer term requirement for personnel trained in the operation of outdoor activities; and in so doing establish ITT as a major centre for tourism training.

9. An Action Programme of 55 measures is outlined to put the strategy into practice over a six-year period, by the end of which South Dublin will have a well-established range of tourism attractions and activities that:
 - Is effectively targeted at its primary market segments,
 - Has an efficient private sector staffed by well-trained personnel,
 - Is realising a significant level of socio-economic benefits for the people of South Dublin, and
 - Brings diversification and differentiation to the overall Dublin tourist offer.

10. The target growth rates set for South Dublin to achieve will produce a doubling of visitors to the County over a ten-year period reaching a quarter of a million. The number of nights spent is set at 1.2 million, with expenditure of between €60 and €65 million. Tourism sector employment can be expected to increase from 2,500 currently to a level close to double that within ten years.



Introduction & Background

Project Brief

South Dublin County Council (SDCC) issued a Tender Document requesting submissions for the Commissioning of a Tourism Strategy for South Dublin County. The brief specified the overall objective of the strategy is to identify actionable recommendations to guide and stimulate tourism development and investment and which can maximise national and international stays/visits to South Dublin County from market segments offering an economic return.

It is required that the final strategy should contain a series of practical, actionable thematic recommendations, and be capable of informing essential actions for the SDCC, its Economic, Enterprise and Tourism Strategic Policy Committee and the sector as a whole. The strategy will frame an action plan to promote and develop tourism in the local economy over the next five years.

The overall objective of the strategy is to identify actionable recommendations to guide and stimulate tourism development and investment and which can maximise national and international stays/visits to South Dublin County from market segments offering an economic return.

TDI Methodological Approach

In designing its research programme and approach, TDI had regard to the work already undertaken and the models and methodology established by Fáilte Ireland, as well as the various strategic plans prepared for mountain areas and inland waterways. Other reports and plans commissioned by the Local and Regional Authorities were examined, along with other relevant reports from other countries relating to the development of the mountain and inland waterways for recreational use and tourism development.

The consultation programme was agreed with South Dublin County Council at the outset of the project. Consultees included Fáilte Ireland, Coillte, OPW, and other State agencies; representatives from the tourism industry in South Dublin; elected members of South Dublin County Council and County Council officials. A full list of stakeholder consultees is included in Appendix 1.

In order to accommodate the full needs of the study, TDI undertook a three stage programme of consultation, research and analysis, concluding in the development of a vision, proposition and detailed strategy leading to a phased road map for the implementation of the key components of the strategy.

A Three Staged Approach



Introduction and Background



In Stage 1 Situation Analysis and Market Research, TDI undertook a comprehensive review of the enabling environment (external and internal) within which the strategy was to be prepared. It commenced with an overview of the relevant literature on strategic planning documents for South Dublin, and a record and assessment of the existing situation in respect of attractions, facilities, amenities and institutional arrangements. Extensive consultation was undertaken with stakeholders in the area. This background programme of research and consultation led to a SWOT (strengths, weaknesses, opportunities, threats) analysis which served to identify gaps and needs in respect of tourism product developments, infrastructure and support services, target markets and segments, financing/investment and organisation.

A crucial consideration in the formulation of South Dublin's tourism strategy is the work of the Grow Dublin Taskforce, most specifically the strategies and targeted foci elaborated in the *Destination Dublin: A Collective Strategy for Tourism Growth to 2020*. Full examination was made of the overall Dublin strategy in formulating a vision, positioning and strategic options.

For Stage 2 of the assignment, the analyses and assessments from Stage 1 were used to guide the future development of tourism in South Dublin based on a full understanding of the present situation and existing plans for tourism markets, the strategies and activities of primary competing destinations, and the aspirations of tourism stakeholders in South Dublin. This led to the identification of tourism development opportunities for the area and appropriate vision, positioning and strategy.

The following strategic elements were identified:

- Vision for the development of tourism in South Dublin,
- Development strategy, and
- Market positioning and targeting.

Strategic options were discussed with the Steering Group at the culmination of Stage 2.

In Stage 3, TDI focussed on the five main components, as illustrated below:

Stage 3 – Tourism Strategy & Road Map



The strategic goals and recommendations for South Dublin are built into an Action Plan covering the first five years of the strategy.

Plan Structure

This report relates to the South Dublin County Tourism Strategy. Following an Executive Summary of main findings, conclusions and recommendations, the Introduction and Background section outlines the context for the study, the required coverage and the methodology employed, as well as the structure of the report. The main body of the report is presented in four parts i.e.

- Part 1 – Product Audit and Situation Analysis;
- Part 2 – Vision and Strategic Options,
- Part 3 – South Dublin Tourism Strategy and Road Map, and
- Part 4 – Action Plan.

Following this introductory section, Part 1 contains five sections:

- Section 1 provides a summary of the existing infrastructure of, and access to, South Dublin County, and the range of recreational and tourism attractions, activities, facilities and amenities developed to date.
- Section 2 examines the national, regional and county level policy and planning context and considerations, and presents an evaluation of the markets and segments of relevance to South Dublin.
- Section 3 draws the findings from the previous three sections together in the form of a SWOT and gap analysis.
- Section 4 focuses on the prime opportunities identified to indicate a broad tourism development positioning for South Dublin.

Part 2 has four sections:

- Section 1 sets out a vision to guide future tourism development in South Dublin having full regard to national level strategies and plans, the Destination Dublin *Collective Strategy for Tourism Growth to 2020*, and the key priorities specified in the present South Dublin Development Plan (2010-2016) and the key considerations outlined for examination in the review of that plan and the development of the next plan (2016-2022).
- Sections 2 and 3 outline respectively the paramount needs for sound and effective tourism planning, and the key principles to guide the strategic planning for tourism in South Dublin.
- Section 4 indicates the two principal choices available to South Dublin in terms of its tourism development strategy, concluding with the recommended way forward.

In Part 3, the nine sections elaborate the proposed strategy and provide a road map for the implementation of the various strategic actions:

- Sections 1 through 8 contain the strategic goals in respect of the development of the tourism product offer, the markets and segments to be targeted and the mix of marketing tools to be deployed. The components of the recommended strategy are explained and illustrated, i.e. range of tourism product developments, access, and marketing and promotion.
- Section 9 indicates the socio-economic impact of the proposed tourism strategy covering volume and revenue targets, and human resource development requirements.

In Part 4, the key actions to bring the strategy to fruition are presented with details of the lead agency, partners and the phased time scale. The action plan is presented under the following heading:

- Organisation and Management,
- Tourism Product Development,
- Access and Infrastructure,
- Markets and Marketing, and
- HRD/Training.

Part 1 – Situation Analysis

1. Product Audit

The resources and features for consideration in the South Dublin tourism development strategy fall into five broad categories. The current situation in respect of each of these elements is summarised as:

Gateways and Access Points

- Strong access links by road and public transport,
- Key centres (Tallaght, Clondalkin, Rathfarnham, Rathcoole/Saggart, Dodder Villages, Newcastle, Lucan).

Accommodation

- 15 hotels with nearly 3,000 rooms,
- 10,000 conference delegate spaces,
- Narrow range of B&Bs,
- Camping and caravan facilities.

Recreational and Tourism Resources

- CityWest complex,
- Two attractions (Rathfarnham Castle, Pearse Museum),
- Castles and houses,
- Museums and other built heritage (e.g. Clondalkin Round Tower),
- Mountains and forests: rich resource,
- Parks: many examples,
- Waterways: rivers, reservoir, canal,
- Stadia and swimming pools,
- Retail.

Visitor Activities

- Outdoor pursuits: walking, cycling, canoe/kayak, equestrian, angling, adventure activities, golf, flying,
- Indoor: bowling, retail, children's play (also outdoor).

Other Tourism-related Features

- Extensive programme of events and festivals coordinated through South Dublin Tourism,
- Pubs and restaurants throughout the County but no outstanding food offer,
- No farmers' market.

Conclusion

There is good access into, but weak internal access within, the County. South Dublin has a strong hotel and conference facility provision, but a shortage of tourism products and experiences – 'things to see and do'.

South Dublin has extensive natural and cultural attributes with significant potential for tourism. The Dublin Mountains and waterways represent outstanding natural assets. To-date, these assets have yet to be fully explored for tourism purposes.



2. South Dublin in its National and Regional Context



2.1 National Tourism Policy and Strategy

In the new national tourism plan, People, Place and Policy – Growing Tourism to 2025, presented to Cabinet in January 2015, approved by Government and set to be officially announced by the Department of Transport, Tourism and Sport (DTAS) by the end of the first quarter of the year, three aims are outlined:

- Increase revenue from overseas tourists, excluding air fares and ferry charges, by €5 billion a year by 2025,
- Increase the number of people working in the sector from 200,000 to 250,000, and
- Attract 10 million visitors to Ireland by 2025.

The plan will be implemented through three-year action plans by a new tourism group. Key aspects will include:

- Marketing,
- Encouraging more events, festivals and conferences,
- Improving training and skills standards in the industry, and
- Ensuring the communities and local authorities play a stronger role.

The draft of the National Tourism Policy for Ireland spells out the key role of local authorities. The Government's "Action Programme for Effective Local Government – Putting People First" envisages a local government system performing a strategic role in relation to economic development in partnership with the relevant government departments and agencies, with the stronger role coordinated through the proposed new regional assemblies. Local authorities will lead the management of their respective tourism destination and the development of tourism expertise in their areas.

Three key policy proposals are:

- Close collaboration between neighbouring local authorities in order to maximise tourism opportunities for their region as a whole,
- The tourism industry (and retail trade in general) will work closely with Local Authorities to develop the tourism potential of their respective regions, based on the framework used for the Business Improvement Districts, and
- DTAS will encourage the sharing of expertise between communities in successful tourism destinations in building the capacity of communities in less advanced tourism areas.

2.2 Destination Dublin Tourism Strategy

Established in 2012 to focus on the marketing and branding of Dublin, the **Grow Dublin Taskforce** (GDT) has the role of identifying how Dublin (defined as the wider Dublin region comprising Dublin City Council and South Dublin, Fingal and Dun Laoghaire-Rathdown County Councils) could deliver substantial growth based on tourism by 2020. The forum is a major collaborative initiative by the key interested parties including the Dublin Local Authorities, Fáilte Ireland, Dublin Chamber of Commerce, and the tourist industry & development organisations.

The GDT report - '**Destination Dublin – A Collective Strategy for Growth to 2020**'¹ - was launched in January 2014. While emphasising that tourism is important to Dublin in terms of revenue and jobs, the report finds that it is underperforming and has slipped behind its main city competitors in Europe. So while over the last three years Dublin has shown the beginnings of a recovery, there remains limited real awareness of all it can offer – particularly in those market segments which hold the most potential for growth in international visitor volume & revenue.

The report sets out a marketing proposition which captures Dublin's unique appeal for visitors: '*Dublin is the vibrant capital city bursting with a variety of surprising experiences – where city living thrives side by side with the natural outdoors.*'

This new plan for tourism in Dublin envisages a best case scenario where:

- Visitor numbers grows by 7% a year,
- Visitor spending increases by 8.6% a year, and
- Spending by international visitors almost doubles to just under €2.5bn by 2020.

The report states Dublin needs to differentiate itself as a “must-visit” destination. As trips become shorter, particularly to cities, Dublin must distinguish itself as a stand-alone destination and an aspirational European short-break destination. If the variety and vibrancy of its attractions can be communicated to potential visitors in key target markets, this is where return on investment is likely to be greatest.



The Taskforce has identified **five key sectors** that offer the best potential for significant growth and the best return on investment:

- **Holidaymakers identified as 'Social Energisers'**² – young couples and adult groups looking for excitement, new experiences, and fun, social getaways to novel destinations,
- **Holidaymakers identified as 'Culturally Curious'**³ – mostly older couples or solo travellers with time (and money) to spend - independent active sightseers looking to explore new places and broaden their minds,

- **Business Tourism** – where visitor expenditure is amongst the highest of all visitors and who are more prone to visit in times when cash flow for Dublin businesses is critical – in the shoulder and off-seasons,
- **Cruise Tourism** - who come to Dublin as part of a European cruise, and
- **Event Tourism** - coming to Dublin specifically to attend an event or festival, whether sporting, cultural, business or any other type of event.

The report contends that by delivering on motivations in the Social Energisers and Culturally Curious segments five additional segments will be attracted to Dublin, namely: Top Tanners, Great Escapers, Nature Lovers, Easy-going Socialisers and Spoil Us.

Social Energisers

Young couples/adult groups looking for excitement, new experiences, and fun, social holidays in somewhere new and different

Curiously Curious

Mostly older couples with time to spend. They are independent 'active sightseers' looking to explore new places and broaden their minds. They want to 'do a place', both its culture and the beauty of its landscape.

Great Escapers

Younger couples, some with babies or young children. They are interested in active & exciting exploration of countryside particularly and really experiencing an off the beaten track 'wow' factor.

Top Tanners

This group tend to be younger with families. They do not have a holiday 'agenda' but are very active on holiday doing lots of stuff, they are looking to have a fun time with partner and occupy the children, if they feel better as a result, that's a bonus

Easygoing Socialisers

Couples, often older, (many 45+) pretty inactive, looking to slow down and relax, enjoy local food and company and perhaps explore their surroundings but not big sightseers

Nature Lovers

This is the oldest group (many 55+) they are looking for simple rural retreat where they can enjoy the beauty and peace and do a bit of sightseeing and gentle exploration

Spoil Us

This group do little on holiday, they want to relax through chilling out, spoiling themselves a bit and enjoying sensory pleasures like food and drink and perhaps a little pampering

¹ <http://www.failteireland.ie/FailteIreland/media/WebsiteStruct>

ure/Documents/4_Corporate_Documents/Strategy_Operatio
ns_Plans/Dublin-a-Collective-Strategy-for-Tourism-Growth.pdf

² <http://www.youtube.com/watch?v=lrWd1UmnJT8>

³ <http://www.youtube.com/watch?v=lrWd1UmnJT8>

A number of plans have been developed by the GDT to achieve significant tourism growth between now and 2020. These include sector specific programmes and cross-sector enabling projects.

The **sector-specific programmes** targeted at the five key markets segments are:

- **Dublin Now Plus** – expansion of the Dublin Now project into Mainland Europe and US markets. Centred on three work-streams developed to overcome barriers to growth: industry engagement and collaboration; digital content and strategy; and in-market activation targeting a young a more vibrant audience – the Social Energiser segment,
- **Bringing Dublin to Life** – Dublin's diversity will be collated into a coherent and accessible experience-development framework under key themes across Dublin city and region to target the Culturally Curious segment. This includes working with festivals & events, developing a range of 'Dubliner's Dublin' experiences; and the creation of a range of new imagery, video and online content to bring the stories of Dublin to life,
- **Dublin – a world class business destination** which aims to position Dublin in the world's top tier of conference and incentive destinations, by targeting conference organisers and potential delegates as well as incentive planners,
- **Dublin Events Forum** – A Dublin Events Forum will bring stakeholders together and facilitate collaboration for the mutual benefit of all involved in organising and bidding for events, and
- **Dublin – a 'must see' destination on a European cruise holiday** – to achieve optimum growth in visitor numbers & revenue a Cruise Dublin Forum will to promote Dublin as a cruise destination to cruise operators, cruise agents and travellers planning a European cruise.

The **cross-sector enabling projects** include:

- **Brand Dublin visual identity** – creation of strong and coherent visual identify which will help to identify participants in the brand activity, present merchandising opportunities for Dubliners and visitors, and effectively identify Dublin across all communications – both domestic and international,
- **Dubliners as advocates of Dublin as a tourist destination** – recognising that Dubliners can be the best ambassadors for their city and region, the plan is to find ways to encourage Dubliners to broaden their mental map of the city and to encourage them to speak positively about the city and region to visitors, their friends, colleagues and family aboard,
- **A powerful marketing communications strategy** – to address the issue of low awareness of what Dublin offers among potential visitors, many of whom have a limited, sometimes distorted, view of what the city and region have to offer,
- **A comprehensive digital plan** – an interactive platform that enables communication between potential visitors, previous visitors, and tourism experience providers. This will enable tourism service providers, event organisers, retailers and experience developers to have a conversation with potential visitors. It will also enable social communications between all interested parties as is now expected in the digital age. Work has already begun on redeveloping www.VisitDublin.com so it is best positioned to attract overseas visitors from our key markets – Britain, Germany, France and the US. The new website will contain new content targeted specifically at the market segments identified as offering the capital City and County the greatest potential for growth,

- **Improve ease of transport and access** – While Dublin is a relatively compact city it can still be a challenge for visitors to find their way around. Information on connections to the wider Dublin region can be hard to find, with the result that the visitor experience is diminished and tourism revenue is not maximised to its full potential. A key focus will be improving signage and public transport information to facilitate greater access, particularly to the wider region and the natural environment on Dublin's doorstep, and
- **Improve accommodation capacity** – A significant increase in visitor numbers will create the need for more hotel beds, particularly in the city centre, and for better transport links between accommodation in the outskirts and the city centre. A first step will be to provide visitor orientated information on public transport links to areas outside the city centre where visitor accommodation is available such as County South Dublin.

Fáilte Ireland's Dublin Team is presently working on four themes in promoting Dublin i.e.

1. Dublin Stories Hidden and Untold,
2. Living Bay,
3. City of Words, and
4. Extraordinary Days & Happening Nights.

2.3 Tourism in South Dublin: Organisation, Performance and Impact

2.3.1 Organisation

The South Dublin Tourism Company was established in 2005 with the objective of encouraging appropriate forms of tourism development, supporting tourism operators in the County, and bringing them together in coordinated actions. Its initial focus was on shopping breaks and the MICE sector, but in recent years the emphasis was concentrated on events and conferences, and sports. The reason given for this switch of focus is a combination of the fact that the impact of events and conferences is measurable and the County's weak present leisure product offering.

In line with national policy and practice in other Local Authorities, in 2014, SDCC decided to stand down the Tourism Company and bring its planning and management of, and support for, the tourism sector in-house.

2.3.2 Performance and Impact

Data Requirements and Limitations

In order to quantify the socio-economic impact of tourism in the South Dublin County area, it is necessary to understand:

1. The present levels of tourism (i.e. visits/recreational activity participants and spending), ideally separated between overseas tourists, domestic visitors and the local population, analysed by three broad motivations i.e. holiday, business and VFR), and
2. The contributions made by tourism (including local residents' recreational activities) in the form of business creation and jobs generated.

These base data are not available and need, therefore, to be estimated based on:

- Fáilte Ireland statistical information for Dublin County as a whole, and other relevant research the organisation has conducted, and
- A survey conducted by South Dublin County Council of the hotel establishments in the County. The questionnaire for this survey was developed and circulated to the hotels in the first week of January 2015.

International, Regional and Dublin Tourism in 2014

An additional 51 million persons made an overnight visit to a destination outside their home country in 2014 compared with the previous year, bringing the worldwide total for international tourist arrivals to 1.138 million, a rise of 4.7% over 2013, according to the United Nations World Tourism Organization (UNWTO). Since 2010, the average annual increase recorded in the level of international tourist arrivals has been a full percentage point above the long term trend line rise of 3.8% a year in the UNWTO Tourism Towards 2030 forecast.

By region, the Americas (+7%) and Asia and the Pacific (+5%) registered the strongest growth. Europe's growth of 4% is significant since the additional 22 million tourist visits in 2014, bringing the total level of visitation to 588 million (over half the global total), has made tourism a significant contributor to the region's economic recovery, particularly in Northern Europe (including Ireland) and Southern and Mediterranean Europe (both up 7%).

Spending in destinations reached €873 billion in 2013 – no data are available at time of drafting for 2014 – a rise of 4% over 2012 (slightly lower than the 5% rise in arrivals in 2013). Spending in Northern European countries rose 6.3% in 2013 to reach €56 billion.

Tourism to Ireland

Ireland exceeded the regional average for Northern Europe recording a rise of 8.9% in international tourist arrivals to reach 7.6 million for 2014. This follows a rise in overseas arrivals of 6.3% in 2013.

Tourism to Dublin

Just under 4 million overseas tourists visited Dublin in 2013, so if the same level of increase was achieved by Dublin as recorded nationally, the level of international tourist arrivals in Dublin in 2014 was 4.3 to 4.4 million. Dublin currently also attracts around half a million trips each year from Northern Ireland.

Ireland's 2013 Performance

The data in Table 1 relate to 2013, the latest year for which complete data are available. As indicated above, results for 2014 will show significant increases across the board reflecting the improved economic environment.

The 6.7 million overseas visitors to Ireland in 2013 generated spending of €3.3 billion, a rise of over 12% on 2012, with visitors from Northern Ireland adding a further €0.3 billion for an out-of-state total of €3.6 billion. The 4 million overseas visitors to Dublin in 2013 spent €1.4 billion, up by 10%, with a further near 0.1 billion additional spending by tourists from Northern Ireland.

Domestic trip taking has declined since the onset of the economic crisis in 2008 but recorded the first rise in 2013 to reach 7.1 million trips. The rise in spending was a little higher at 2.1% reaching €1.4 billion.

The volume of domestic trips to Dublin as the main County visited declined by 3.4% in 2013 to 1.3 million. This fall was against the trend of an overall rise in Irish domestic trips of 1%. Spending on domestic trips to Dublin also fell – by 10% to €195 million – based on Dublin as the main County visited, but rose marginally to €255 million if all domestic trips that involve a visit to/through Dublin are considered. The holiday shares of trips and spending where Dublin is the main destination were 47% and 64% respectively in 2013.

Table 1: International Tourist Arrivals and Spending, 2013

Overseas Arrivals	Million	% change on 2012
World	1,087	5.0
Europe	563	5.4
Northern Europe	69	5.8
Ireland, incl Northern Ireland	8.3	9.2
Ireland, excl Northern Ireland	6.7	6.3
Dublin, incl Northern Ireland	4.5	9.8
Dublin, excl Northern Ireland	4.0	9.8
Overseas Visitor Spending	€ billion	% change on 2012
World	873	4.1
Europe	368	4.2
Northern Europe	56	6.3
Ireland, incl Northern Ireland	3.6	11.7
Ireland, excl Northern Ireland	3.3	12.2
Ireland, total FE receipts	4.5	11.9
Dublin, inc Northern Ireland	1.5	8.6
Dublin, exc Northern Ireland	1.4	10.0
Domestic Visits	Million	% change on 2012
Total within Ireland	7.1	1.1
Trips to Dublin	1.3	-3.4
Domestic Trip Spending	€ billion	% change on 2012
Total within Ireland	1.4	2.1
Trips to Dublin	0.3	4.1

Source: TDI calculations based on UNWTO and Fáilte Ireland data

Future Prospects

For 2015, UNWTO forecasts international tourist arrivals to grow between 3% and 4%. Europe's inbound tourism is expected to be in line with this trend. The continued expansion of global tourism is attributed to a combination an improvement in the global economic situation and lower transport costs resulting from the decline in the price of oil.

For Ireland, the World Travel and Tourism Council sees a sustained annual rate of growth of almost 5% over the next decade leading to 11.2 million international arrivals spending €12.4 billion by 2024.

The "most stretching" scenario of the Grow Dublin Taskforce strategy document is for a 7% a year growth to 2020 leading to 6.2 million overseas arrivals spending €2.5 billion by 2020. On this basis, Dublin's growth will be double the global average and one-and-a-half-times the national average.

Combined Overseas and Domestic Tourism Performance to South Dublin

There are no data on overseas and domestic visitor flows and spending disaggregated to the individual County level within the overall Dublin region. In order to develop a set of base figures for visitor flows into South Dublin, the numbers of nights spent in the County and their spending:

1. Fáilte Ireland undertook a statistical analysis for the South Dublin tourism strategy research programme based on the 4-year average of its Survey of Overseas Travellers covering the period 2010-2013,
2. Results of the SCCC Hotel Survey of January 2015 on guest source, purpose of visit, employment and suppliers were used, and
3. Published Fáilte Ireland and CSO Household Travel Survey data relating to overseas and domestic tourism to the Dublin region were drawn on.

Full details of the calculations made are presented in Appendix 4 - Estimating the Value of Tourism to South Dublin.

The base level estimates of overseas and domestic tourism to South Dublin in 2013 are outlined in Table 2. The total level of overnight visits in 2013 was 120,000, spending just over half a million nights and spending in total €26 million. While the figures should be interpreted with caution given the need for making a number of assumed conditions, they represent a best estimate of the County's tourism performance.

Table 2: Tourism to South Dublin, 2013

Origin	Visits ('000)	Nights ('000)	Spend (€ mn)
Overseas	40	328	14
Domestic (incl Northern Ireland)	80	176	12
Total	120	504	26

Source: TDI estimates based on Fáilte Ireland Analysis of Survey of Overseas Travellers, the SDCC January 2015 Hotel Survey, Fáilte Ireland Tourism Facts 2013, and the CSO Household Travel Survey Quarter 1, 2014

Events and Conferences

Data accessed from the records of the South Dublin Tourism Company indicate that the economic benefit from tourism was greater than the level suggested by the Fáilte Ireland data.

Economic Impact

The key economic parameters guiding tourism strategy in South Dublin are the income generated from tourists coming to the County and the scale of employment created through tourist activity.

As already noted no data exist to provide a firm, accurate figure for both these items. The level of tourist visitation and expenditure in the County are estimated above.

In terms of employment, hotels in South Dublin are estimated as providing employment full and part time employment for 1,500. This figure is based on the numbers of full and part time employees in the 10 hotels responding to the SDCC hotel survey which in total accounted for three quarters of the County's hotel room supply grossed up to account for the remaining hotels in South Dublin.

Nationally, hotel employment accounts for 28% of tourism sector employment, with similar shares held by public houses and restaurants⁴. The remaining 16% are spread across tourist attractions (11%) and non-hotel forms of commercial lodging (5%). In Dublin, the share of restaurants (42%) is significantly higher at the expense of tourist attractions (7%), non-hotel forms of commercial lodging (2%), hotels (24%), and public houses (25%).

In order to establish a basis for estimating total current employment in the tourism sector in South Dublin, it is necessary to estimate the ratio of hotel jobs to those in other parts of the tourism sector. The national and Dublin ratios for hotel jobs cannot be used in South Dublin because the hotel sector is well developed in the County while other areas of tourist businesses are not, particularly in respect of tourist attractions but also for restaurants. The field surveys and consultations undertaken with South Dublin tourism stakeholders lead to the conclusion that hotel employment is the main category of job generation in South Dublin's tourism sector, accounting for over half and - possibly – as much as two-thirds of all tourism employment.

It is estimated that in 2013, tourism provided employment for between 2,250 and 3,000 persons in South Dublin on a full or part time basis. As there is little seasonal tourist activity in South Dublin presently, there are not thought to be more than 100 or 200 additional seasonal jobs in the sector. For the purposes of this strategy, a level of 2,500 jobs is taken as the base figure for the tourism sector in South Dublin, representing around 5% of total jobs generated by tourism in Dublin as a whole.

Tourism's economic contribution to South Dublin in 2013 is estimated at:

- **Tourist spending €26 million**
- **Employment 2,500**



⁴ Fáilte Ireland Tourism Employment Barometer 2011

2.4 Ongoing South Dublin Tourism Initiatives

Table 3 presents a summary of the status of a series of established and ongoing initiatives involving the SDCC in collaboration with other parties or through its own endeavours.

Table 3: Status of Current, Planned and Potential Initiatives, as at end February 2015

Source: SDCC

Initiative	Status		
<u>COLLABORATIONS</u>	Current/In Planning/ Future	Date of implementation/estimated future launch	Funded/ to be funded
1. Dublin Mountains Partnership	On-going		Coillte/SDCC/ DLRCC (Possibly Dublin City)
2. Dodder Greenway	In Planning	At environmental assessment stage – Full Route (2015 – 2016)	National
3. Clondalkin Round Tower Project	In Planning	Construction to be completed by July 2016	SDCC
4. Grand Canal Way	On-going		Waterways Ireland/SDCC/HCC
5. River Liffey	Future	Heritage Trail and Greenway Opportunity	FI/Local Authorities/NTA/OPW
6. Hellfire Club	Future	Potential location for flagship project, scoping discussion on-going	Coillte/ SDCC/ DMP FI
7. Aviation Museum	On-going	At feasibility stage	Irish Aviation Authority/ Department of Defense
8. Bohernabreena Reservoir	Future	Possible amenity/activity potential	SDCC/FI
<u>SDCC INITIATIVES</u>			
9. Slade Valley Heritage Trail	On-going	Access under investigation	SDCC/LEADER
10. Dublin Mountains Archaeology Trail	Future	Scoping discussions on-going	SDCC/ Coillte/DMP
11. Tallaght Stadium Development	On-going	New stand scheduled for...	SDCC
12. Villages Initiative	On-going	Part 8 Public Consultations Plans	SDCC
13. Tallaght Arts Cluster development	On-going	Collaboration on Regional Arts Festival	SDCC
14. Corkagh Park	On-going	Camac Greenway	SDCC
15. Tymon Park	On-going		SDCC
16. Griffeen Valley	On-going	Griffeen Greenway	
17. Health & Wellbeing Programme	On-going		
18. Network Strategy for Linkages	On-going	Greater Dublin – Cycle Network Plan	NTA/SDCC & Other Local Authorities
<u>OTHER INITIATIVES</u>			
19. Grow Dublin Alliance	On-going	Chairman Appointed	
20. OPW Projects: Rathfarnham Castle	On-going	Scheduled to re-open June 2015	OPW
21. St Enda's	On-going	On-going enhancements prior to 1916 Centenary	OPW
22. Dublin Institute of Technology	On-going	College part of DIT. Key role in tourism training and education	

2.5 Market Evaluation

Profile of Tourist Market Demand for Ireland and Dublin

In determining the market segments for South Dublin's future market strategy, full consideration is necessary of the growing trends and tastes of the principal categories of purpose of visit, including holiday/leisure/recreation, business meetings/events/ conferences, other events (e.g. sports), and education. At the same time, account must be taken of the ability of South Dublin to respond to these market needs in terms of the resources it possesses and the attractions and activities that can be developed or expanded.

This process necessitates an examination of the activities engaged in by visitors to Ireland and the attractions both overseas visitors and domestic trip takers find most popular.

Key Trends

There are a number of tourism trends with relevance for the development of tourism in South Dublin:

- **Demography:** The number of people in older age categories is rapidly increasing. Seniors will be healthier and will have higher disposable incomes than in the past. More experienced senior travellers will increase faster than the development of tourism demand in general. Smaller households will result in higher disposable incomes and spending power.
- **Travel Experience:** More sophisticated consumers are increasingly self-assured regarding their needs and rights. For tourism, this results in an increasingly critical attitude to quality, and to the price-quality ratio.
- **Awareness & Education:** The average level of education is increasing. This will result in holidaymaking in which the arts, culture and history play a more important role, including more educational and spiritual holidaymaking.
- **Information Technology:** The penetration of the internet - and its use for information and the purchase of tourism products and services - will continue to increase. For tourism, the role of the internet - including new means of visual presentation - will increase still further, and will prove to be of the utmost importance in future.
- **Transportation:** The increasing availability of low-cost air carriers will influence travel flows.
- **Sustainability:** Environmental consciousness will continue to increase. For tourism, this will result in more demand for sustainable destinations, in which nature and population will play an increasingly prominent role.
- **Safety and Security:** Acts of terrorism, regional wars, pollution and other crises have unfortunately become facts of daily life, and influence the need to feel safe and secure. In tourism, this results in an increased need for safety and security, and in tourists avoiding destinations that are perceived as unsafe.
- **Emerging and new destinations:** With the influence of the web and popular web and print based analyses of "new places to visit" and "top ten" places to visit, as well as the continuing popularity of long haul, generates a wide range of competitors for all destinations.
- **Ireland:** The country will have to compete hard to even attract traditional and existing markets, since these also have a wider choice of destinations. The tourism and hospitality offer and experience offered to visitors must be unambiguous – visitors need to know what they are going to get in the destination, suggesting that the products need to be well defined and accessible.
- **Fragmentation of consumer interests:** Increasing diversity of tourist interests suggests that a range of opportunities for visitors are required, with mutually reinforcing products and services, but each well matched to their specific market – e.g. sports or cultural activities; family or moderate walks and physical opportunities; sightseeing; food and drink; heritage etc. Each product needs to be part of the destination "offer" but in addition differentiated for its own market.
- **City breaks** remain popular and low cost travel reinforces this interest amongst visitors, using public transport once here and being entertained by the quality of the food and drink and entertainment product.
- **Getting the Basics Right:** whatever their primary motive for destination choice, the common needs for all visitors are:
 - Transportation to and around the destination,
 - Somewhere to stay, and
 - Food and drink.

Almost two-thirds of overseas expenditure in Ireland goes on bed and board (30%), food and drink (21%) and internal transport (13%)⁵. The basics require: ensuring the type of lodging available is what the tourist in the different market segments want, providing a range of traditional, local and international-style bars and restaurants, and having good local transport services and signage to key sites in the destination.

⁵ Fáilte Ireland Tourism Facts 2013

Outdoor Activities

The outstanding merit of South Dublin's natural resources through the Dublin Mountains, its numerous parks, and the various waterways that run through the County represent prime assets for outdoor activities. As society has become more aware of the health benefits of exercise and increasingly appreciative of the natural environment and the need to ensure it is well protected, so demand for both active and passive pursuits in the outdoors has grown.

Destinations seeking to develop attractions that appeal to tourists increasingly recognise the importance of quality recreational facilities delivering social, health and economic benefits.

Ireland has the natural resources to take advantage of these developments. Visitors, both international and domestic, take part in a wide range of recreational activities in, on and around Ireland's mountains and waterways. These resources also provide a visual amenity and in some cases have historical and cultural associations. They provide a resource for many people and in turn generate revenue for local communities and the wider economy.

In Ireland, outdoor activity participation levels in 2013 were highest for hiking/walking (11% of overseas visitors participated, followed by cycling (4%), golf (3%) and angling (2%). In each case, the participants' share of overseas visitor spending in Ireland exceeded their participation levels i.e. hiking/walking 20%, cycling and golf both 7%, angling 3%. For the domestic holidaymaker, two of the top three activities were hiking/walking and water sports, with the leading attraction was visits to houses/castles. These findings augur well for South Dublin since it has the resources to provide outstanding experiences in each of these activities and attractions.

South Dublin Market Prospects

South Dublin receives a very small share of total inbound tourism to Dublin. This is a result of a combination of:

- Weak market (both consumer and travel trade) awareness of South Dublin's visitor resources and attractions,
- Limited tourism product and experience development catering for visitors, and
- Lack of marketing and promotion of South Dublin as a distinct and different component of the wider Dublin tourism product offering.

In order to establish the County as a substantive and growing tourism destination, the first priority will be to seek to obtain maximum exposure and benefit from the development and marketing initiatives of the national agencies and the Destination Dublin team.

Tourism and Fáilte Ireland have identified a range of market segments that are viewed as having the best prospects for growth in coming years. These are:

- Social Energisers (young, fun-loving urban adventurers),
- Culturally Curious (over 45s who want to broaden their minds), and
- Great Escapers (younger couples who want to get away from it all).

In respect of the domestic market, Fáilte Ireland identifies three strong growth segments, each of which represents potential for product developments related to the natural and cultural resources of South Dublin. These segments are: connected families, footloose socialisers and indulgent romantics - details given in Appendix 6.

The opportunity afforded to South Dublin by the collective strategy and programme of marketing communications activities for Destination Dublin through the Grow Dublin Taskforce and the dedicated Dublin Unit within Fáilte Ireland is a major one. Full advantage should be taken of the marketing and other work streams through close coordination and participation, as appropriate.

The five segments identified for priority focus in the Destination Dublin report represent strong opportunities for South Dublin in respect of:

- Business, and
- Events.

In addition, South Dublin can offer additional cultural heritage elements to those in other parts of Dublin to cater for the Culturally Curious segment.

There is, however, little apparent "fit" with the remaining two segments being targeted by Destination Dublin, namely Social Energisers and Cruise.

Taking a consensus of the stakeholder research and the trends in international tourism, the greatest opportunities for tourism development in South Dublin are considered to be related to its natural environment, in particular the Dublin Mountains and the waterways.

The development of outdoor activities and experiences related to these assets will have the greatest appeal to two segments that are not currently afforded priority status in the Destination Dublin strategy i.e.

- Great Escapers, and
- Nature Lovers.



3. SWOT/GAP Analysis

A total of 34 consultations were held with agency officials, tourism officials, elected representatives and private sector operators in South Dublin. These consultations were in addition to the SDCC-conducted survey of hoteliers, the results of which are contained in Part 1, section 2.3.

Pulling together the findings of the programme of stakeholder consultations and examination of planning approaches both in Ireland and international destinations, the following SWOT and gap analysis was prepared:

Strengths

- Outstanding natural resources in the form of mountains, waterways, parks,
- Excellent access into the County,
- Strong hotel base,
- Good business, sports and retail facilities,
- Attractive villages, and
- Significant cultural and built heritage e.g. Rathfarnham Castle.

Weaknesses

- Poor market awareness
- Limited provision of attractions, activities and supporting facilities,
- Inadequate information and interpretation of County's features,
- Weak food and evening entertainment offer,
- Limited internal access within the County,
- Limited accommodation range,
- Absence of tourism data, and
- Negative environmental practices.

Opportunities

- Full participation in the Destination Dublin strategic plan,
- Exploit product development opportunities through partnerships, networks/linkages and community engagement:
 - range of outdoor activities,
 - food and evening entertainment,
 - sports facilities,
 - events and festivals,
 - MICE business tourism,
 - cultural heritage product offer,
 - educational tourism,
 - agri/rural tourism,
- Public realm improvements,
- Standardised signage, and
- Capital funding sources.

Threats

- Failure to “buy in” to Destination Dublin strategic plan,
- Failure to work effectively with adjoining counties, the private sector and local communities,
- Land issues - access restrictions to privately held land, intensification of land use competition,
- Failure to develop the tourism product in line with market requirements, and inadequate marketing support,
- Dumping and pollution,
- Economic downturn, and
- Limitations of financial and human resources.

In summary, South Dublin has a range of natural, cultural and built resources of outstanding merit but they are not well-developed or presented to the market. Through the boost provided by the Destination Dublin strategic plan to 2020, and by collaborating with other parts of Dublin, neighbouring counties, private sector developers and operators, and local communities, South Dublin can develop a distinct and distinctive range of tourism products that will complement those of other parts of Dublin and generate substantial socio-economic benefits for the County.

4. Overall Positioning

In order for South Dublin to realise its potential and gain maximum benefit from collaboration in the Destination Dublin strategic plan to 2020, future tourism development in the County should be focused on three principal forms i.e.

- Business tourism, capitalising on present strong visitor base,
- Outdoor activities, exploiting the County's key natural assets of Dublin Mountains, the many waterways, and parks, and
- Sports, expanding the range of facilities in the County and targeting both participants and spectators.

Supporting interventions in cultural heritage will be important to the full realisation of the County's potential in these three areas.

Part 2 – Vision & Strategic Options

1. Vision for South Dublin Tourism

1.1 National Context

Buoyed by continued strong recovery in 2014 with overseas visitor numbers up by 9% and spending by 14%, with business confidence levels back to the pre-crisis levels of 2008, Fáilte Ireland is anticipating further significant growth in inbound tourism in 2015 and beyond. Its strategic priorities in 2015 are:

- Big Ideas and Signature Programmes, including the development of a Dublin brand with a focused marketing campaign,
- Business Tourism and Major Events,
- Home Holidays, with emphasis on the Discover Ireland campaign, and
- Sales, Digital and Experience Development.

It will complete and launch a destinations strategy for the South and East of Ireland. Among its supporting measures, Fáilte Ireland offers grants through its Regional Festivals and Events Programme.

Tourism Ireland has six target segments in its international marketing strategy for 2015:

- Culturally Curious (focusing on the Wild Atlantic Way, Dublin and the South and East),
- Social Energisers (through the Vibe of the City, Active in Nature),
- Diaspora around the world,
- Business Tourism,
- Great Escapers (using the Living Historical Stories, Awakening the Senses and Active in Nature themes), and
- Golf.

Digital partnerships and cooperative marketing are strong features.

1.2 Destination Dublin

Dublin's overall goal is to distinguish itself as a stand-alone city destination offering a diverse range of attractions and activities and to communicate this variety and vibrancy to selected key target segments in the international market i.e.

- Two segments in the leisure market, namely social energisers, culturally curious,
- Conference and incentive visitors in the business market,
- Cruise visitors, and
- Event visitors.

The Grow Dublin Taskforce believes that “focusing on these sectors represents a strategic decision to concentrate limited investment cost effectively in attracting Dublin's best prospects where the greatest return on investment is likely to be generated.”⁶

The Grow Dublin Taskforce distilled these findings into the following proposition statement:

Dublin is the vibrant capital city bursting with a variety of surprising experiences – where city living thrives side by side with the natural outdoors

Such a statement clearly represents great opportunities for South Dublin since the County has the potential to provide “surprising experiences” for international visitor to Dublin City and, more than any other part of the wider Dublin area, it offers the “natural outdoors”.

The *Collective Strategy for Tourism Growth to 2020* also stresses the fact that future success will depend on collaboration and cooperation between the various public bodies, industry groups and service providers over and above the extent to date. That means removal of territoriality between administrations, increased public: public and public: private partnerships, and full incorporation of local communities. The unifying way forward based on the new Dublin proposition is stated in the Grow Dublin Taskforce plan as:

We will work together to unlock Dublin's vibrancy and diverse, surprising experiences



⁶ Destination Dublin. A Collective Strategy for Tourism Growth to 2020. Grow Dublin Taskforce. January 2014

1.3 South Dublin Development Plan

In drafting an appropriate vision to act as the guide for the future development of tourism in South Dublin, full cognisance is taken of the overall core strategy that is determining the overall development of the County in its current 2010-2016 Development Plan, namely: to promote a more consolidated and compact urban form for this County, entailing, inter alia: consolidating/strengthening designated town centres, particularly the County Town of Tallaght, and supporting the Villages, including supporting and encouraging the participation of local communities, in the preservation and maintenance of our traditional Villages consistent with their continued function and the existing zoning of the lands concerned⁷.

The potential contribution to employment of tourism is recognised and encouraged in the 2010-2016 Development Plan, as is the need to protect and enhance the natural and built environments, which are central to the promotion of tourism in the County. The development of major leisure facilities, tourist trails and rural tourism are listed among the six tourism policies are elaborated in the Plan.

In respect of tourism recreation, the stated policy of the Plan is the promotion of the use of natural assets for recreation purposes for both residents and visitors, to which end the Council committed to formulating an Asset Management Plan to sustain, promote and actively manage sensitive landscapes and habitats, walking routes and linkages between the urban, rural and mountain areas.

The Pre-Draft document for the review and planning process for the preparation of the County's 2016-2022 plan states that the overarching considerations that will inform policies and objectives throughout the plan focus on improving the quality of life of the County's population, creating economic wealth, sustainable development of key resources, and health and wellbeing.

Central to the planning approach is that the future plan should ensure that South Dublin County is positioned to take its full share of the Region's growth and that it continues to offer a high quality environment within which to live, work and do business. Tourism development – both in the form of recreational attractions and facilities, and features that facilitate increased business and related events – directly addresses this goal.

The Vision for South Dublin's Future document addresses the role of tourism, recognising its contribution "to the economic and social well being of an area on many levels. It generates revenue, supports jobs, and creates a critical mass to sustain services and events that may not otherwise be viable. Infrastructure and enhancement projects linked to tourism, improve quality of life for all. South Dublin has tourism potential. The County's heritage, village networks and amenities such as the mountains and river valleys all offer opportunities that can be used to strengthen the tourism offer of the Region."

1.4 Proposed Vision

Taking full consideration of the future tourism development and marketing strategies at the national and regional (Dublin) levels and the overall ambitions and foci of South Dublin's own development plan, it is clear that the vision for tourism development over the next decade should encourage tourism and recreational use of the County's resources and attributes but that developments and operations to facilitate such usage should be held in balance with the:

- Preservation of the pristine environment of its mountain areas and waterways,
- Conservation of its built historical heritage, and
- Maintenance of the authenticity of its living cultural heritage.

Indeed, tourism should be a force for the achievement of the aims to protect the County's special aspects rather than an activity that needs to be kept in check. Tourism and recreational developments and operations to be encouraged should be:

1. Fully sustainable, and
2. Targeted at those segments that place a high value on unspoilt and well-preserved natural environments, fully protected historic sites and the distinctive cultures of the people of the destinations they visit.

These various aims are incorporated in the following draft vision statement to guide tourism development in South Dublin County:

South Dublin County tourism development, working through a wide range of partnerships, will:

- *sensitively preserve the County's mountain areas, waterways and rural areas,*
- *accurately interpret its past, and*
- *authentically present its vibrant culture*

in order to provide world class recreational, business, sporting and educational opportunities, fostering economic growth and improving the quality of life in the County's communities.

⁷ South Dublin County Council Development Plan 2010-2016. Written Statement. October 2010.

2. The Imperatives

2.1 Exploit the Opportunities through Market: Product Matching

The optimal approach to the development of a destination for tourism needs to be based on what the market wants and be in line with market expectations. Products and markets should be mirror images of each other. Products should only be developed if there is evidence of demand, with the scale and phasing of development related to the size and growth rate anticipated in market demand. The standard approach to tourism product development planning for a destination involves the preparation of a comprehensive assessment of the overall situation (i.e. administrative, economic, socio-cultural) and an audit/inventory of tourism resources and assets – natural, cultural and historical – and existing products.

Combined with a SWOT analysis, this enables a comprehensive assessment and understanding of the present situation to be developed. The process of planning involves gathering information regarding the expectations of the possible target markets and segments which are then used to develop appropriate products and services in the destination.

Many destinations both in Ireland and elsewhere around the world have a wealth of natural and cultural resources with the potential to meet the needs and expectations of many tourist market sources and segments. However, these resources have not been developed to attract and cater for their market potential. These destinations do not have weak potential; what is needed is the development of the resources and attributes of the destination into a set of cohesive and dynamic tourism products. Such developments must, however, be market need/interest-based and in fulfilment of an integrated market: product development strategy.

2.2 Integrated Development and Marketing Approach

Intra-sectoral and **inter**-sectoral coordination is essential in tourism development planning:

- Intra-sectoral to ensure all the components of tourism are in line with each other so that there are no weak links in the tourism supply chain, and
- Inter-sectoral to ensure the greatest level of both direct and indirect economic benefits may accrue to the destination, in particular in respect of transport, construction, and agriculture sectors.

The optimal range and level of economic benefits to a destination accrue from close and effective integration of all components in the tourism value chain. Such optimisation involves investigations to identify the gaps or links in the chain that require enhanced provision. TDI's approach to tourism product identification is set within the value chain analysis framework. For specific destinations within South Dublin our approach is to identify product development initiatives that will strengthen the value chain by filling gaps, and diversifying and strengthening existing products. Potential enterprise and business opportunities will be identified to address the present shortfall in provision that impairs the functioning of the value chain. The fuller the base of tourism and tourism-related operations, and the stronger the links between the different product components, the more productive will be the tourism value chain.

In addition, for tourism to make the most effective and valuable contribution to a destination, its development should be closely coordinated between government, the private sector and the communities where tourism takes place. The public sector's role is:

- The overall management of tourism for the optimal welfare of its population, ensuring developments and operations are sustainable and within the limits of acceptable change to the residents of the area,
- The provision of the necessary infrastructure, education and training programmes etc. to facilitate the sector's smooth functioning, and
- The creation of a strongly positive image for the destination as a whole.

The development of recreation and interpretation resources by themselves do not produce tourist visitation. However, expanded, coordinated, and focused tourism development and marketing can lead to profitable operations and yield economic benefits for the destination. Marketing the destination to create awareness of what it has to offer by way of attractions and activities needs overarching coordination with the lead responsibility resting with government, though the private sector should be involved in the design of the destination branding and marketing messages. Individual operators are responsible for the generation of custom for their individual businesses.

South Dublin County has strong access transport infrastructure and a good hotel sector but lacks the coordinated development of its natural and cultural resources to sustain a substantive tourism sector. Product developments have occurred haphazardly without direction in the absence of an official, clear and comprehensive tourism development and marketing strategy based on a prioritised list of product opportunities assessed in respect of their market (and market segment) potential.

There is no critical mass of tourism products to attract significant inflows of visitors. The situation is exacerbated by:

- An inadequate level of focused, research-based marketing by South Dublin County's tourism agencies (other than in respect of business and events tourism),
- A lack of investment in tourism and recreational product development, and
- Limited coordination in, and between, the public and private tourism sectors outside the area of business and events activity.

2.3 “Fit” with Destination Dublin Tourism Strategy

No tourism destination operates in isolation. Its opportunities and performance are impacted and shaped by the attributes, policies, strategies, developments, operations and marketing of its neighbours and other competitors.

South Dublin is one of three local government County areas along with the functional area of Dublin City Council making up the overall Dublin Region. It accounts for around one-fifth of the Region's total population.

Dublin is the primary destination in Ireland receiving 60% of total international tourists to the country in 2013 (i.e. almost 4 million) and over 40% of their expenditure (i.e. 1.4 billion). It is also a main destination for domestic tourists i.e. 1.3 million of the total of 7.1 million in 2013.

Of the four administrative areas making up the Dublin Region, South Dublin is the least recognised for leisure tourism while performing strongly in business tourism. It is widely acknowledged, however, both by the residents of the County and in the wider community that South Dublin possesses resources, attributes and infrastructure that can enable it to become a distinct and distinctive destination for a range of recreational activities as well as being a centre for business.

The creation by Fáilte Ireland of the Grow Dublin Taskforce in 2012, the Steering Group and Working Groups of which included representatives from all four County councils, other public sector bodies, representative organisations and private sector operators, led to the preparation of the strategic planning document Destination Dublin: A *Collective Strategy for Tourism Growth to 2020*. This inclusive strategy represents a prime opportunity for South Dublin to boost awareness of the County's tourism assets and benefit from the collective actions outlined in the plan.

That said, the natural and cultural resources in South Dublin, its transport infrastructure and industrial and commercial development over recent decades provide opportunities over and above the prime development and marketing thrusts identified in the pan-Dublin tourism development strategy. While it is imperative for South Dublin to align itself closely with the strategic actions outlined in the Destination Dublin plan, in order to gain maximum benefit for the County, it should not be constrained by the overall plan but seek to realise additional opportunities over and above those identified. Clearly, the facts that a large section of the Dublin Mountains is located in South Dublin, allied to the array of waterways running through the County, represent possibilities for recreational tourism development that are not available to such an extent in the other administrative areas of the Dublin region.

The approach taken in the preparation of this tourism strategy for South Dublin is, therefore, to combine maximum synchronisation with the directions and actions of the Destination Dublin strategic plan with the identification of additional opportunities, both in terms of product developments and market segments. The Destination Dublin strategic plan is a valuable vehicle to boost tourism in South Dublin but the focus and certain emphases need to be modified for South Dublin to achieve the maximum benefit.

2.4 Generate Socio-Economic Benefits

Tourism takes place where other people live. The development of tourism attractions and facilities is fundamentally to raise the quality of life of the communities of the destination, such benefits taking the form of:

- Economic i.e. increased business opportunities, job creation and incomes for local people, while taxation and other revenues accruing to the destination's administration can be utilised in improved infrastructure, education, health, recreational and other facilities, and
- Social i.e. the development of attractions, facilities and amenities to draw visitors into the area can also be utilised by local residents, thereby increasing their enjoyment of living in the area.

Clearly, then, residents of the destination need both to be part of the decision making process on developments and have a consensus in favour of the developments being planned. Commitment to such an approach to the two year programme of review and planning for the preparation of the South Dublin County Development Plan 2016-2022 was given in September 2014 when the process was launched through the publication of the document A Vision for South Dublin's Future⁸.

⁸ Development Plan 2016-2022. A Vision for South Dublin's Future. South Dublin County Council. September 2014.

3. Strategic Principles

3.1 Partnerships: Councils, Public Agencies, Private Sector and Communities

One of the basic tenets of tourism area policy setting and strategic planning is that tourists do not recognise administrative boundaries in their choice of itineraries: their sole concern is to pursue their interests. This can represent a challenge where the administration responsible for features – especially natural features such as mountain ranges and waterways – rests with different councils.

This issue is of particular relevance in respect of the two outstanding components of the natural environment in South Dublin County. Dublin Mountains range across both South Dublin and Dun Laoghaire Rathdown County Council areas, and represent a continuation of the Wicklow Mountains in County Wicklow which also stretch into Counties Carlow and Wexford.

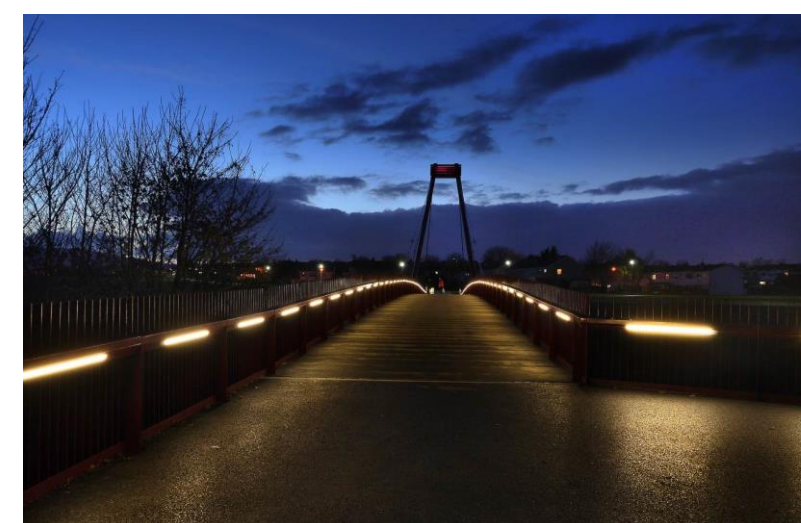
A second major resource for tourism recreation development is the number of waterways that run through South Dublin County e.g. the River Liffey, flowing from County Kildare and into the Dublin City Council area with Fingal County on the north side of the river bank, the Grand Canal, and the Dodder River.

A further consideration is that many of the resources with potential for tourist use are administered by national public agencies over which local councils have no jurisdiction. Of relevance in South Dublin are Coillte (forestry), Office of Public Works – OPW (e.g. Rathfarnham Castle), Waterways Ireland (e.g. Grand Canal), and Irish Water (scheduled to take over Bohernabreena Reservoir from Dublin City Council).

In all these instances, successful and sustainable tourism development will not occur without close liaison and cooperation between the councils and other public bodies which share the resource. An example of a multi-agency partnership plan that is being implemented is the detailed 2007 development and management plan for the Dublin Mountains Way. A further example of collaboration is the Cavan Burren Park which is a joint initiative involving Coillte and Cavan County Council.

At the same time, tourism is undertaken by the private sector. Investment conditions have to be sufficiently attractive to stimulate the development of attractions, activities and facilities catering for tourists. That entails both positive policies from the local council towards tourism product development, and fully joined up thinking and collaboration between all public sector bodies. Private sector businesses also work productively with administrations in designing and delivering the destination marketing brand, positioning and communications. Marketing collaboration between South Dublin public and private sector stakeholders and the regional and national agencies of Fáilte Ireland and Tourism Ireland is essential.

As already noted, tourism development is heavily dependent on the support of the residents of the destination that hosts tourist visitation. Without widespread assent from the local communities to the forms and scale of tourism development and activity, a destination can gain the reputation of being unwelcoming. In such circumstances, tourism demand is likely to falter. The resident population should be active partners in a destination's tourism, both as providers and operators of services, and as patrons for the various tourism products operated in the area.



3.2 Product Development based on Flagships, Clusters, Trails/Circuits/Corridors and Events

Tourism product development is most effective when planned projects are prioritised in a pyramid fashion according to scale and significance in terms of attracting tourists to the area. At the top of the pyramid are flagship projects, those that are attractors to the destination in their own right. Further down the scale – though of no less importance for the communities of the areas in question – are clustered developments and tourist routes (or circuits, trails or corridors, depending on terminology). All these development require supporting initiatives such as signage, visitor information access points etc.

A central component of a destination's differentiation is a flagship tourism attraction. Flagship tourism products are those with such strong market appeal that they determine the travel decision and choice of destination. Their role is, therefore, vital to destinations. Once a destination has a flagship attraction, all elements of the tourism sector can benefit. Extra demand is generated for the accommodation sector as flagship product visits typically involve an overnight stay in the destination. Other destination attractions and facilities also benefit through increased patronage and custom. The economic benefits to a destination from a flagship tourism development can, thus, be extensive.

While the role of flagships is important, for destinations that do not have any single outstanding resource, or where other opportunities exist to complement the flagship development, the clustering of attractions in a well-defined geographic area or related to a theme can be an effective form of development. In certain areas where there exists a logical sequence in the form of a waterway, highway or established pathway or bridleway, scenic or themed routes (trails, corridors or circuits) can be the optimal form of development to bring benefits to communities which might not otherwise be visited.

In order to attract more tourists to a destination, induce them to stay longer, and be convenient for tour/ground operators, various sites and attractions have to be combined or linked in one area. It is necessary to develop a product that effectively integrates sites, attractions, events, activities, and associated accommodation. This clustering of sites and the development of routes involves developing, packaging and showcasing attractions and authentic products (crafts, events, services, products, experiences) on routes to achieve a strong appeal.

The overall concept for South Dublin aims to establish and promote a strong flagship set of products related to the Dublin Mountains plus a network of designated clusters, scenic and themed routes and trails, with appropriate signage and interpretative information that forms strong linkages with tourism sites and attractions, protected areas, visitor information points, community projects, events, and related experiences.

There is then the need to integrate all these elements, in terms of:

- Delivering product experiences,
- Raising awareness about exploring and discovering the destination, and,
- Marketing and promoting the destination.

3.3 Market Positioning and Targeting

As outlined in Part 2, section 2.1., success for a destination is the accurate targeting of its tourism products to those market segments to which they will appeal. A destination brand positioning statement is needed to guide its brand communications strategy to attract the segments identified as representing the greatest potential. The positioning statement outlines the strengths and associations that make the brand not only different but also meaningful to the target segments. As such, it drives the proposition.

The complicating factor for South Dublin is that it has two diverse target groups:

- Business visitors to the existing strong commercial and industrial base, and
- Leisure visitors to the outstanding natural and cultural resources of the County.

Since the business base for visitor inflow is well-established and will continue, even without significant additional intervention by the County, the focus of the tourism strategy will be on developing the leisure opportunities of the County.

Furthermore, business tourism can be boosted through:

1. increased collaboration between the local authority and the hoteliers in supporting the organisation of business events and related activities , and
2. the development of additional and improved leisure attractions and facilities, such as:
 - Giving the business visitor things to see and do in free time outside business commitments, and
 - Serving to attract additional MICE events, many of which have structured official and free time programmes.

Taking account of this analysis, a credible and actionable brand positioning statement for South Dublin County can be:

The mountains and waterways of South Dublin County are within minutes of the centre of Dublin and provide exhilarating and relaxing opportunities to be as active as you want or simply absorb the views. It is easy to enjoy the outdoor recreational activities, stories, music and food, whether in the mountains, along the rivers or canal, or in the small towns and villages. You don't just visit South Dublin, you experience it in every way.

The *Handbook on Tourism Destination Branding* produced by the United Nations World Tourism Organization in association with the European Travel Commission contains a model for developing a destination's positioning and brand. The exercise presented below illustrates the development of a positioning statement and brand concept for South Dublin, starting from the top and descending through five stages:

- **Rational attributes:** the main tourism assets – the things people like to see and do in South Dublin.
- **Emotional benefits:** the next stage is to explore visitors' 'emotional take-out' – the emotional impact it has on them, based on consumer perceptions of the destination and their motivation for travel.
- **Brand personality:** the brand personality is then established following a competitor analysis, to identify what is truly unique about South Dublin in the form of a succinct summation of its defining characteristics and how it would like to be seen by its key audience.
- **Positioning statement:** the summary of South Dublin's strongest competitive stand out features comprises the positioning statement. This functions as the basis that should guide all marketing activity.
- **Brand essence:** the brand essence comprises a small number of enduring core values which, in combination, constitute South Dublin's DNA.

Table 4: Positioning Statement and Brand Concept for South Dublin

Stage	Feature	Question to be answered	South Dublin
Rational attributes	Main assets	What do visitors like to see and do?	Outdoor pursuits – hard and soft – in its nature features; exploring historic and cultural heritage of towns and villages; participating and spectating at sports events; attending business events
Emotional benefits	Visitors' emotional take-out	How do visitors feel about the place?	Sense of escape from normal lives stimulated by a combination of physical activity, visual beauty, historic sites and warmth of reception
Brand personality	Main character traits	How would it like to be seen and described by its main audience?	Dublin's premier area for outdoor activities, easy to get to, and a complete contrast to other parts of Dublin
Positioning statement	Strongest competitive features	What makes it stand out from everywhere else?	The combination of three major elements: ideal natural environment and terrain for outdoor recreational activities and sightseeing; long history manifested through buildings, events and stories; and strong business and transport infrastructure
Brand essence	DNA	What is its essential nature and character?	Natural, invigorating, different, traditional values married to modern lifestyle

Source: TDI research based on model outlined in *Handbook on Tourism Destination Branding*. ETC/UNWTO. 2009

3.4 Best Practice Exemplars Aligned to Proposed Positioning

The proposed positioning of South Dublin primarily focused on outdoor activities will manifest itself through a series of developments facilitating visitors use and appreciation of the natural environment of Dublin Mountains and the waterways.

To guide future developments, a number of best practice case studies are examined. These relate to:

- Outdoor orientation/interpretation centres,
- Outdoor pursuits/education centres,
- High level viewing platforms,
- Reservoir development for recreation use, and
- Sports hubs.

The exemplars presented in appendix 5 and referred to in the relevant section of Part 3 dealing with product development recommendations illustrate the importance of:

- Good access with clear signage,
- Stand out features that appeal to the relevant market segments, based on a clear understanding of product: market matching,
- Partnerships between land owners, local authorities, communities and private operators, and
- Provision of a range of services to meet the full information and other needs of the target markets (e.g. equipment hire).



4. Strategic Options

4.1 The Two Options

This tourism strategy for South Dublin has to be geared to the types of product development that can be provided given the destination's basic resources and other attributes. The SWOT and gap analysis in section 1 shows clearly that South Dublin County has significant opportunities in the areas of outdoor activities, business and sports tourism. A hierarchy of possible product development opportunities is shown in the schedule attached as Appendix 1 (and accompanying map), divided between a flagship project with several components, a series of clustered developments, corridors/circuits/trails and supporting measures.

Two options are identified in respect of South Dublin's tourism strategy over the next five years.

Option 1:

Adhere closely the strategies and actions being undertaken for Dublin as a whole through the Destination Dublin planning document, focusing product developments and marketing on the five segments identified as offering the best potential for Dublin.

Option 2:

Work in association with the Destination Dublin strategies while adding product developments and targeted marketing at further segments for which the County's resources represent strong potential.

4.2 Option 1 - Mirror Destination Dublin Tourism Strategy

The Destination Dublin strategy identifies two primary leisure segments, namely **social energisers** and **culturally curious**, contending that these are "early adopters of trends" and other leisure segments "can be expected to follow as a result of success" in their development. Among the second tier segments are the **great escapers** and **nature lovers**, the profile of which are clearly closely oriented towards the potential offering in South Dublin.

Of the other primary target segments of the Destination Dublin strategy, the **conference and incentive visitors** and **event visitors** offer significant opportunities for South Dublin; but the potential offered by cruise visitors is less since, even for excursions during their stay, it is the City centre that will have most appeal.

While, therefore, following the Destination Dublin strategy, but not expanding it to include segments more fully oriented to South Dublin's product development opportunities, can enable the "improved collaboration" scenario annual growth rate of 5% to be achieved for South Dublin. It is doubtful, however, if by limiting itself to the target segments identified in the Destination Dublin strategy, South Dublin can achieve the levels of growth set for the "game changer" scenario i.e. 7% visitor numbers, 8.6% expenditure.

4.3 Option 2 - South Dublin Destination Dublin PLUS Strategy

The positioning statement for Destination Dublin specifies "surprising experiences" and the "natural outdoors", facets that represent clear opportunities for South Dublin. Yet, none of the four leisure visitor experiences identified in the strategic plan – extraordinary days and happening nights, living bay, city of words, Dublin stories hidden and untold – feature or focus on the prime attributes of South Dublin. There is a risk that by limiting its strategy to those segments chosen for principal focus in the Destination Dublin strategy, a number of opportunities in South Dublin will be missed (e.g. in respect of the **Great Escapers** and **Nature Lovers** segments) as will a number of other opportunities that are specific to South Dublin County e.g. sports and education. Visiting Friends and Relatives is a market segment omitted from direct consideration in the Destination Dublin plan.

In addition, the Destination Dublin strategy addresses only overseas markets. The domestic market, however, represents a significant opportunity for South Dublin to exploit. There are three primary segments identified in Fáilte Ireland's analysis and assessment of the domestic Irish market, each of which can be targeted by the proposed product developments in South Dublin i.e. **Connected Families**, **Footloose Socialisers**, **Indulgent Romantics** – profiles given in Appendix 6 Again, the VFR segment is also an important one for South Dublin in the domestic market.

There are significant opportunities for South Dublin, which will be realised both through full participation in the Destination Dublin marketing and promotional activities, and the development of products for, and undertaking of marketing aimed at, the additional prime opportunity segments identified in this strategy both in the overseas and domestic markets. The South Dublin Destination Dublin PLUS scenario will add significantly to the directions of the Destination Dublin strategy by focussing intensified product development and marketing support for these additional segments.

The South Dublin Destination Dublin PLUS scenario will add to the directions of the Destination Dublin strategy by including product development and marketing support for these additional segments.

Given implementation of a coordinated and targeted strategy on these lines, then target growth rates at least as high as for Dublin as a whole can be expected. Indeed, taking account of the present modest base levels for tourist visitation and spending in the County, these targets can be stretched beyond those of the Destination Dublin “game changer” scenario over the next five years; with similar above-average growth in domestic demand too.

4.4 Recommended South Dublin Tourism Strategy

It is proposed that South Dublin County Council should adopt the Destination Dublin PLUS strategy. This will entail:

- Full and close collaboration with the Destination Dublin team of Fáilte Ireland in all the campaigns and activities to ensure that South Dublin is given the maximum, appropriate coverage and treatment.
- The encouragement of the development of attractions and facilities designed for South Dublin's primary opportunity segments of Great Escapers and Nature Lovers in overseas markets; and the preparation and execution of campaigns and activities over and above those of Destination Dublin focussed on these segments; while in domestic markets the focus will be on Connected Families, Footloose Socialisers and Indulgent Romantics, along with VFR visitors from both international and domestic markets.
- Product development and marketing for these segments should be developed in full consultation between the Council and the private sector operators in South Dublin; and in close liaison with the Destination Dublin team, with the view to seeking additional support for these marketing activities, and with Fáilte Ireland in respect of the domestic market.



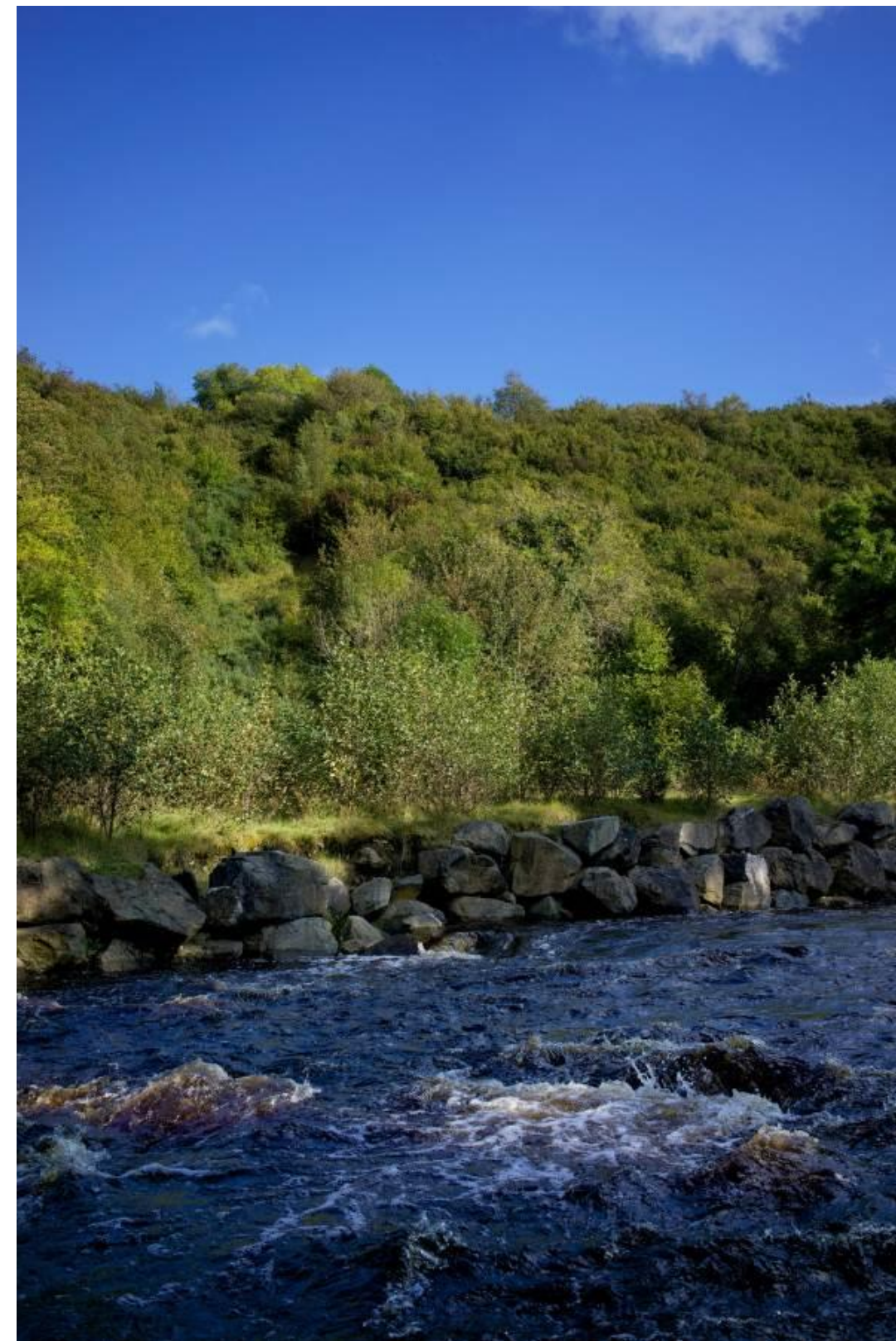
Part 3 – South Dublin Tourism Strategy & Road Map

Table 5 (to follow) summarises the full process from weaknesses through opportunities to strategic goals and recommendations. The detail of these stages are outlined in the subsequent sections of Part 3, concluding with the South Dublin Tourism Action Plan.

1. Moving from Weaknesses to Strategic Recommendations

The South Dublin tourism strategy has been designed to:

1. Overcome the weaknesses observed in the development, delivery, organisation and marketing of the County's tourism offering,
2. Capitalise on the assets suitable for tourism use by addressing these weaknesses and converting them into clear and realisable opportunities;
3. Establish strategic goals related to the opportunities identified,
4. Translate these goals into a series of recommendations related to product development, access and infrastructure, marketing and promotion, organisation and management, human resource development and funding, and
5. Create a phased action plan for the realisation of these recommendations.



2. Translating the Weaknesses into Opportunities

2.1. Tourism Products and Services

The programme of research and analysis undertaken in fulfilment of the preparation of the South Dublin tourism strategy entailed field visits, wide ranging consultations with both public and private sector stakeholders and elected representatives. The approach also involved discussions with, and inspection of visitor statistics and analyses generated by Fáilte Ireland.

This exercise identified a number of areas of deficiency in the tourism product offering to visitors, and in its presentation and promotion, as well as in the organisation and management of the tourism sector in the County. None of these weaknesses, however, are of such a serious level as to impair the development of a strong and sustainable tourism sector in the County: they merely reflect the fact that tourism has not to date been a priority sector for the administration or the private sector, other than for the hotels sub-sector dealing primarily with business demand.

Even in the elaboration of the weaknesses in the consultations, the emphasis was on the strength of the County's tourism assets and how the potential that these have could be realised. The primary concerns that are perceived as inhibiting visitors – both from domestic sources and overseas – coming to South Dublin, as well as limiting the enjoyment of local residents in the nature and culture of the County, are:

- **The lack of an extensive range of things to do and see in the daytime.** This observation relates both to organised activities and attractions, as well as access (in terms of signage, facilities, amenities and permissions to certain areas) for the informal user.
- There is **little access for the public to South County's heritage product offering.** The many historical sites and aspects of Irish speaking tradition are in the process of being built into the County's Tourism product but, at present, there are only two historical sites that record visitation levels. The praiseworthy activities of Aras Chronan can reach only a limited audience without significantly increased support. Moreover, a number of South Dublin's villages are rarely visited by people from outside the area, yet are considered to offer an insight into traditional and small-scale modern community life.
- **The limited and (largely) unexceptional range and standard of nighttime entertainment.** South Dublin has cinemas, RUA RED Arts Centre, a Civic Theatre in Tallaght, and a number of pubs offer live evening entertainment (including three in Tallaght). The area, however, does not have a stand out reputation for providing visitors with either a wide choice or good access to traditional music and dance.
- Associated with the nighttime offer limitations, though wider in its implications, is the **small range and weak reputation of the County's places for visitors to meet their culinary needs.** A good range of pubs and restaurants operate, some with distinctive character. However, few have a reputation outside the immediate area, and the visitor 'food' experience is generally acknowledged as weak.
- There is a **lack of coordination of South Dublin's many sports and outdoor activities.** The County's Sports jewel is the underutilised Tallaght Stadium, for which spectator capacity expansion plans have been approved. There are many significant sports facilities in the County and similarly the potential exists for a wide range of outdoor activities.

- **The potential for themed events and festivals is being under-realised.** The organisation of events related to sports and outdoor events, arts and heritage, etc would serve to heighten awareness of the County's tourism assets, and be a significant income generator.
- **Hotels' business guests are uninformed and unaware of the County's attractions and activities.** Consequently, they do not participate in South Dublin in the things they can do and see in their free time from professional commitments, but instead head into the centre of Dublin.
- **South Dublin's range of commercial lodging is dominated by business hotels with little available in characterful accommodation** in natural settings and through the use of traditional buildings, forms of lodging that can appeal to the discretionary visitor seeking an authentic feel of the destination.
- There is **little exposure for tourists of the County's rural areas** much of which is farmed in small-scale holdings.
- There is **inadequate exploitation of the County's strengths in education and training** in the form of the Institute of Technology Tallaght.

2.2. Access and Infrastructure

The access into South Dublin County through the highway network, and rail, luas and bus services is good. The difficulty arises for visitors when they arrive in the County. There are no visitor information centre services, signage is haphazard and often out-of-date, and there are few bus services to sites of tourist interest. In short, the visitor is very much on his/her own in finding their way around. The on-going roll-out of the County Signage and Villages Initiative will address these issues.

2.3. Organisation, Management and Implementation

The difficulty for the Council in justifying support for the tourism sector is that the lack of economic evidence in the form of levels of visitation, spending, and businesses and jobs supported wholly or partly through tourism. To rectify this deficiency, the Council will need to work with Fáilte Ireland to develop a database that provides such information.

To-date, tourism promotional efforts at a local level have focussed on events. Inadequate resources have been allocated to the development and marketing of tourism products and experiences. The Council recognises the need to support the relationship between the public sector and the tourism industry. To that end, it has taken steps to develop a comprehensive tourism strategy that will set the agenda for the Council's work in the organisation, management and implementation of tourism in future. The role for the Council is twofold: implementer and coordinator.

All destinations are judged by specific aspects related to what the visitor was looking for from the visit, and general factors such as the warmth of welcome and the level of upkeep and appearance of the public areas. Negative environmental practices such as flytipping, littering are detrimental to tourism. The Council will be responsible for actions to reduce such activities and, where they occur, to take rapid clean up steps. Maintaining a clean and attractive public realm is fundamental to a successful tourism destination. The concept of a Best Villages programme as mentioned earlier can assist in this matter, as can the on-going Villages Initiatives.

2.4. Markets and Marketing

Tourist visits to South Dublin presently occur for:

- Business reasons (either to attend a MICE event or to conduct some form of business with, and/or through, the numerous industrial and commercial operations located in the County, and which are served by the 15 hotels based in South Dublin),
- VFR (visiting friends or relatives) purposes to see residents in the County, or
- Leisure purposes, where arrangements are made and activities undertaken independently.

Business and VFR visitors predominate for two reasons: first, their purpose of visit is tied to South Dublin; second, the County's present product offering shortcomings act as a deterrent to the prospective visitor for leisure/recreation purposes; and, third, this category of visitor is unaware and uninformed about the attractions, activities and facilities of the County.

The absence of marketing and promotion, designed to create awareness of South Dublin's tourism assets (among prospective visitors and South Dubliners themselves) and to convert that awareness into interest, desire and actual visits to the County, is serving to inhibit the growth of tourism.

South Dublin does not have a distinct or distinctive tourism identity; it needs to develop reasons to visit that are based on its differentiation from other parts of Dublin and neighbouring counties, though at the same time recognising that collaboration with other administrations will be necessary to create sets of experiences that will draw visitors into the broad area.

The Destination Dublin initiative represents a major opportunity for South Dublin to put itself on the leisure visitor map, and full use of the resources and campaigns to feature South Dublin will be vital. However, it should also be recognised that the principal target segment opportunities for South Dublin – Great Escapers, Nature Lovers – are not in the top flight of segments being targeted in the short term by the Destination Dublin team. To realise the full potential of these segments, as well as the three important domestic segments of connected families, footloose socialisers and indulgent romantics, South Dublin itself will need to develop and execute a coherent and effectively-targeted campaign of marketing and promotional activities. There will be a strong emphasis on digital marketing – own website, use of facebook, twitter, instagram, StoryMap, TripAdvisor – to both create awareness and bring the experiences available in the County directly to the traveller.

2.5. Human Resource Development

Tourism is an activity whereby people serve people. The impression created by front line personnel dealing with visitors merits the highest attention by any tourism destination. Their requisite skills are both technical and social – and, in many instances, linguistic too. South Dublin does not have at present a sufficient supply of trained and qualified local personnel to meet a substantial increase in its tourism product development. The development of a range of education and training programmes using the under-recognised strengths of the Tallaght Institute of Technology, as referred to earlier under 2.1. Product Products and Services, represents an opportunity to address this shortcoming.

Local personnel in positions where they come into direct contact with visitors also have a role to play in passing on information about the availability of attractions, activities and facilities in the County. All tourism service personnel should have the knowledge and ability to talk to tourists in a well-informed and enthusiastic manner helping the tourist and spreading more benefit across the County.

2.6. Capital Funding

The recent economic environment in Ireland has led to the availability of sources of funding being reduced and the conditions attaching to the realisation of funding support being tightened. This is a particular problem for a County like South Dublin that needs significant levels of public and private investment to build the tourism industry up from its current low base.

Aside from projects that the Council itself finances, including its in-house tourism section and the targeted destination marketing campaigns, it will be necessary for the Council to identify and facilitate access to the full range of sources of finance available for different types of project.

2.7. Matrix: Weaknesses, Opportunities, Goals, Recommendations

The accompanying matrix constitutes a summary of the weaknesses outlined above and the potential opportunities to address these, leading on to the strategic goals and recommendations through which these opportunities can be realised.



Table 5 – Tourism Strategy Development Process

Category >	Weakness >	Opportunity >	Goals & Recommendations	
Product Development	Limited provision of outdoor, nature-based attractions, activities and supporting facilities	Exploit product development opportunities through partnerships, networks/linkages and community engagement to create a range of outdoor activities	Nature/Outdoor Activity	Nature/Outdoor – Cultural Heritage combined
			<p>Dublin Mountains Park Flagship Project (working with Coillte, DMP and other stakeholders) incorporating the three elements of: Interpretation Centre, Orientation/Interpretation Centre, National Outdoor Pursuits/Education Centre, and Elevated Viewing Platforms. Also, creation of Looped Trails, Activity Events</p> <p>Longer term opportunity to develop the upper Kiltipper/Bohernabreena reservoir for a full range of water-based activities- dependent on the availability of the reservoir for recreational usage subject to arrangements with Irish Water and full environmental impact assessments.</p>	<p>Creation of a series of clusters of nature-based and cultural heritage attractions and activities in different parts of the County i.e.</p> <ul style="list-style-type: none">▪ Lucan/Palmerstown▪ Tallaght▪ Rathfarnham/Marlay▪ and related to special interests e.g. Golf <p>Creation of a series of corridors, looped trails and circuits for walking, cycling, kayak/canoe and equestrian (as appropriate) related to a combination of natural and cultural features i.e.</p> <ul style="list-style-type: none">▪ Clondalkin/Grand Canal/Newcastle▪ Dodder Greenway - Rathfarnham,, Templeogue, Tallaght▪ Slade Valley - Saggart, Rathcoole

The full version of Table 5 has been included as appendix 6.

3. Recommended Goals and Strategies: Product Development

South Dublin's natural environment constitutes the primary basis for the development of a substantial and sustainable tourism sector. The Dublin Mountains, the forested hills, the several waterways in the valleys along with the Grand Canal and the Bohernabreena Reservoir and the many open green areas represent the potential to attract a range of outdoor activity enthusiasts – both participants (across the scale of physical exertion) and those who wish to enjoy the natural, unspoilt features. These potential visitors are incorporated principally in what the national tourism agencies classify as the strong growth *Great Escapers* and *Nature Lovers* overseas market segments, and the *Connected Families* and *Indulgent Romantics* in the domestic market. Aspects of the County's natural environment will also be of interest to the *Social Energiser* and *Culturally Curious* overseas market segments, to Dublin area residents as weekend excursions, as well as providing activities for business visitors in their free time. The more dedicated outdoor pursuits participants can be reached through the associations/clubs, and media dedicated to their chosen activity.

The primary goal for South Dublin's tourism strategy is to develop the infrastructure, attractions, activities, and facilities of its natural resources; and to present these through well-targeted marketing communications to the target audience.

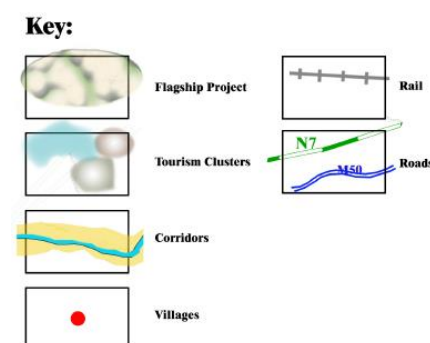
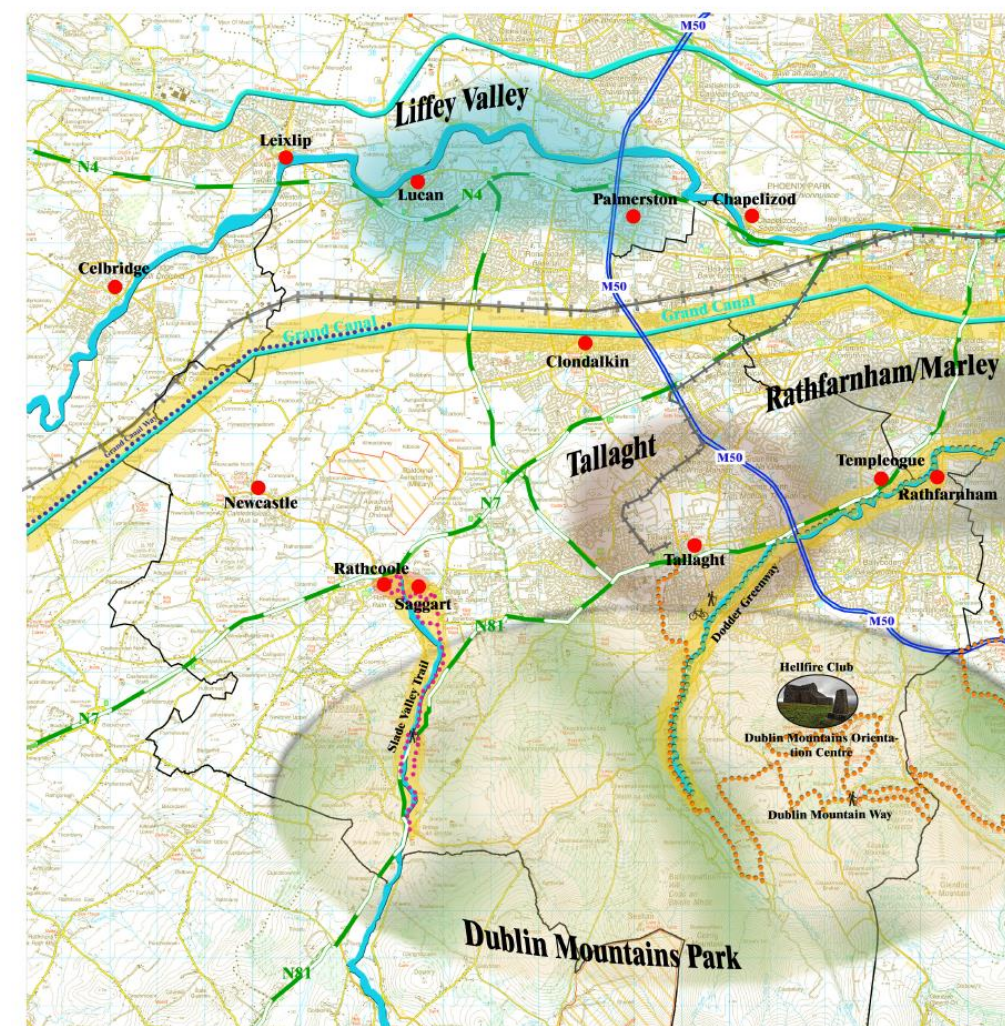
Cultural heritage features can also be additional, experience enriching components for visitors whose primary motivation in travelling to South Dublin is focused on the County's natural assets, or for business purposes, or to visit friends and relatives. Cultural tourism products can play a significant role in differentiating a destination.

Significant historical events that have taken place in the area of South Dublin (from pre-Christian to Norman through to Ireland's quest for independence), the built heritage of the area, allied to the fact that the County has quite a strong Irish speaking community, in combination represent a major opportunity for the County's tourism development. The goal is to create a series of attractions, events/festivals and activities (through looped trails) that establish the County's historical assets and cultural heritage as a significant draw for visitors from the Culturally Curious segment (a primary target segment for Destination Dublin).

Many natural, historical, cultural features and service facilities are not sufficiently interesting individually to attract many tourists to a destination, but can be valuable parts of a visitor's itinerary through the grouping together of features within a locality (i.e. clusters), or the creation of looped trails, combining a variety of elements of different types. **The development of clusters, corridors, and looped trails can be an effective means of creating critical mass and serve to persuade the prospective tourist to visit the destination.** The goal is to support the development and marketing of a series of clusters and looped trails, routes and corridors combining multiple features, attractions and activities.

In line with the agreement at the Steering Group meeting in January 2015, a **hierarchy of tourism product** developments are recommended in the South Dublin tourism strategy in fulfilment of the aforementioned goals. These comprise a flagship project – the Dublin Mountains Park, three clusters of attractions, three corridors/trails/routes, plus a number of supporting developments and actions. These are elaborated in the following paragraphs and accompanying maps.

**South Dublin Tourism Strategy-
Hierarchy of Product Development**



Area in Context:



3.1. Recommendation: Dublin Mountains Park

The principal recommendation is the creation of a **Dublin Mountains Park Flagship Project**.

The proposed Park will be the centrepiece of South Dublin's positioning promise to **"provide exhilarating and relaxing opportunities to be as active as you want or simply absorb the views"**.

The groundwork for the proposed Park was laid in the 2007 study *"Dublin Mountains – Strategic Development Plan for Outdoor Recreation"* which led to the establishment of the Dublin Mountains Partnership - DMP (with Coillte, South Dublin County Council, Dun Laoghaire Rathdown County Council, Dublin City Council, National Parks and Wildlife Service and the Dublin Mountains Initiative, an umbrella group representing the recreation users of the Dublin Mountains as partners) in May 2008, and the creation of the Dublin Mountains Way, a long distance walking trail from Shankill on the coast to Tallaght. The DMP has a dedicated website which identifies key sites of interest in the area. The Vision, as adopted by the DMP remains valid, as indicated below:

The Dublin Mountains is a well resourced and well managed area of significant scenic and high nature conservation value that provides a:

- High quality recreation amenity and experience,
- Breathing space for residents and well informed responsible visitors, and
- Sustainable economy for those who own or manage the land.

The recommended strategy is to move on from the Dublin Mountain Way to establish Dublin Mountains as a primary draw for domestic and overseas visitors and local residents through the development of attractions, activities and facilities catering for the interests and needs of users.

South Dublin County Council will work in partnership with the DMP, Coillte (the landowner for large parts of the area), Dun Laoghaire Rathdown County Council and all other agencies and stakeholders to deliver an agreed sustainable tourism strategy in the Dublin Mountains in order to deliver a visitor experience characterised as the Dublin Mountains Park.

Project Components

It is proposed that the Dublin Mountains Park Project will be underpinned by a 'Flagship' development and a suite of other product development and infrastructure interventions:

3.1.1 The Dublin Mountains Orientation and Interpretation Centre – Flagship Project

Consistent with the recommendation in the 2007 study, this Centre will present the Dublin Mountains Story. It will be targeted at visitors seeking to learn about the geology, history, archaeology, nature and future of the Mountains, what to do in the Mountains, and how best to enjoy the Mountains while maintaining the quality of the environment. It could also provide facilities such as parking, food and beverage, toilets etc. and offer visitor information on guided walks, maps/orientation to other attractions in the mountains - Dublin Mountains Way, Zip It, Tibradden etc., - as well as on other tourist attractions and activities in South Dublin. The project will be subject to careful environmental assessment.

The location should be selected with excellent panoramic views over Dublin Bay, through the construction of elevated viewing platforms. A site at Killakee/Montpelier Hill (featuring the Hellfire Club as the potential focal point) is identified as the preferred location for this development. The support of Coillte will be required to support this project. South Dublin County Council will work in partnership with Coillte to develop the facility.

Though no equestrian trails have been established as yet, appropriate routes can be considered at Montpelier Hill (Hellfire Club) and Massy's Woods (opposite Montpelier Hill). Though existing mountain biking in the Dublin Mountains takes place in Ticknock in Dun Laoghaire Rathdown County, the planned extension of the trails there and the possible creation of new trails further west in the Ballinascorney area would heighten the reputation of the Mountains for the activity. The model in Ballyhoura straddling the counties of Cork and Limerick is relevant in considering a mountain biking development in the South Dublin part of Dublin Mountains⁹.

The formation of a multi-stakeholder working group, and the preparation of a full masterplan and feasibility study on the facilities, operation, management and marketing of the proposed Centre are priority early steps to be taken.

Detailed proposals for the Centre will be the subject to the masterplan but a viewing point, visitor information and facilities, and high quality interpretation should be regarded as the cornerstones for the Centre.

⁹ visitballyhoura.com/index.php/mountain-biking/
www.coillteoutdoors.ie/index.php?id=171&rec_site=113

Table 12 Product:Market Matching – Dublin Mountains Park Flagship

Markets/market segments Product	Domestic (Ireland), including Dubliners			International Leisure				Business		Sports	
	Connected Families	Footloose Socialisers	Indulgent Romantics	Social Energisers	Culturally Curious	Nature Lovers	Great Escapers	MICE Delegates	Other Business	Participants	Spectators
DUBLIN MOUNTAINS PARK FLAGSHIP											
Orientation/ interpretation centre	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Outdoor pursuits/education centre	✓	✓		✓		✓	✓		✓		
View platforms	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Looped trails – walking, cycling, equestrian etc (link with Dublin Mountains Way)	✓	✓		✓		✓	✓				
Activity events	✓	✓		✓		✓	✓	✓	✓		
Dublin Mountains touring route	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓

3.1.2 The Dublin Mountains Outdoor Pursuits Centre

Geared towards meeting the facility and equipment needs of visitors seeking outdoor activities such as mountaineering (at Kippure and Seahan for licenced/approved groups), orienteering, zip wire, and water-based activities etc.; with skills training and residential facilities offering overnight accommodation of a form appropriate for outdoor activity enthusiasts. Such outlets cater for a wide range of segments from school groups to corporate team building. Good exemplars that can guide the design of the proposed Centre are One Great Adventure in County Down, Northern Ireland¹⁰ and Killary Adventure Centre, Co. Galway¹¹. (See Appendix 5).

This project will be subject to Irish Waters strategic requirements and careful environmental assessment.

3.1.3 The Dublin Mountains – Tourism Experience Enhancement

In concert with its partners and other stakeholders, South Dublin County Council will deliver other phased enhancements of the visitor experience and awareness of the mountains.

One of the principal challenges is access to and around the mountains – both for the independent traveller with own transport and for those without transport. The goals and proposals to establish improved access to visitor information, local transport services, and signage are considered in the subsequent section 4. Recommended Goals and Strategies: Access and Infrastructure.

The development of routes and trails in and around the Mountains so that visitors may have their own individual set of experiences is a key to maximising visitor satisfaction. Both through the use of specialist resources in-house and from the community, South Dublin County Council will develop and promote additional trails both in the Dublin Mountains and elsewhere in the County for, inter alia, walkers, cyclists (including mountain bikers), and horse riders, and will support local initiatives seeking to establish such operations.

Proposals to create a series of combined natural and cultural heritage attractions and activities are outlined later below. Similarly, support will be provided through the proposed County Promotion and Tourism Section in the County Council to the organisation, marketing and management of events and festivals taking place in the Dublin Mountains Park. South Dublin County Council will work with DMP and Coillte in the delivery of routes and trails in the Dublin Mountains.

Finally, the creation of both awareness of what the Mountains have to offer and positive expectations among prospective visitors will be achieved through the use of marketing tools that maximise the visual impact of the area, including through a Dublin Mountains visitor app, in conjunction with Dun Laoghaire Rathdown Council – see section 5. Recommended Goals and Strategies: Markets and Marketing.

3.2. Recommendations: Clusters and Corridors

The creation of clusters and corridors/trails/routes represents a means whereby the socio-economic benefits of tourism can be shared across South Dublin County since each community can be part of a cluster or corridor. They can strengthen the interest and appeal of the different areas of South Dublin for visitors. A series of six clusters and corridors/trails/routes are proposed.

1. Liffey Valley Cluster,
2. Rathfarnham/Marlay Cluster,
3. Tallaght – Activity and Sports Cluster,
4. Grand Canal Corridor,
5. Dodder Greenway Corridor, and
6. Slade Valley Corridor and Heritage Trail.

South Dublin County will establish a wide network of partnerships and working groups to design, support the implementation and utilise appropriate marketing tools to create awareness of, and demand for, a range of clustered features and looped trails (related to themes, or general sightseeing interest). These partnerships will be with other public agencies, including neighbouring counties of Fingal and Kildare (in respect of the Liffey Valley cluster), with community groups and with private sector interests.

¹⁰ www.onegreatadventure.com

¹¹ www.killaryadventure.com

3.2.1 Liffey Valley Cluster

The envisaged development is a corridor stretching along the Liffey Valley from County Kildare through South Dublin into Dublin City, thereby linking South Dublin with the heart of Dublin. The proposals draw on and elaborate the concepts and management framework of two previous studies finalised in 2008: *Towards a Liffey Valley Park*¹² (undertaken through a steering group of four County Councils, led by the Office of Public Works), and the *Liffey Valley Town Centre Local Area Plan*¹³ undertaken by South Dublin County Council.

The principal components of the Liffey Valley cluster are proposed as follows:

- **Arthur's Way** – themed trail set up in County Kildare that features points/places associated with Arthur Guinness. Arthur's Way will constitute part of the Liffey Valley Cluster, bringing socio-economic benefit to the villages close to the trail in Counties Kildare and South Dublin, by incorporating them within a focussed tourism attraction. The concept envisages the extension and expansion of Arthur's way from Celbridge to Leixlip, through South Dublin taking in Lucan, Strawberry Beds, and Palmerstown, and into the City through Chapelizod, and on to the Guinness Storehouse. There is strong potential to capture part of the large volumes of visitors to Phoenix Park and Farmleigh House through this trail. The Guinness (Farmleigh) Bridge restoration can be an early project in this development.

Supportive statements contained in the Fingal County Council Tourism Strategy, Kildare County Council, and Fáilte Ireland underpin the joint commitment to the development of this Heritage Route. The project to interpret and make accessible heritage on the Liffey and develop a tourism experience can serve to:

- Connect South Dublin to Dublin City,
- Develop a market awareness of the beauty of this part of Dublin,
- Provide an enjoyable experience to tourists and locals, and
- Support local Villages such as Lucan and Palmerstown as well as Villages in other counties.

The Arthur's Way Trail can be explored by various means of transport but not by boat excursions along the Liffey because of the weirs. Visitor boats operate up the Liffey as far as Heuston Station. The possibility exists for operating a shuttle bus and/or walks from this point to other points along the Arthurs Way i.e. Farmleigh House, Phoenix Park, Lucan and, in due course when developed, Shackleton Mills¹⁴. This Arthur's Way Heritage Trail could serve as a precursor to the development of the Liffey Greenway, discussed later below.

- **Liffey Villages** – featuring the villages along the River linking Palmerstown and Lucan with Leixlip and Celbridge in County Kildare, with Lucan serving as the “hub” for the entire cluster. The focus will be on a quality food offering. Village heritage trails and the attractive amenity offering of the riverside parklands and demesnes, with potential spurs to the Royal and Grand Canals for longer linear cycling routes.

The development and marketing of the food offering can be supported through the Local Enterprise Office Food Academy and other initiatives, with the support of local authorities and stakeholders, as well as through interventions from the Chambers of Commerce Tourism Committees in both Counties. Proposed Actions:

- Establish a small committee representing the local authorities and Chambers of Commerce,
 - Commission and agree on proposition and branding for Liffey Villages,
 - Implement Heritage and Food Trails with interpretative signage/boards incorporating branding,
 - Coordinate the Water Sports offering and market more coherently including using events for profile,
 - Develop a Liffey Villages Brochure/Guide for tourists,
 - Implement supportive public realm interventions and involve Village Tidy Towns,
 - Leverage public, private and Fáilte Ireland funding, in line with the support received by the Coastal Villages programme, and
 - Explore viability of a Liffey Festival of Food and Fun, an Inter-town annual canoe race, and a Mini Liffey Descent.
- **Liffey Greenway** – involving Dublin City, South Dublin, Fingal and Kildare County Councils working with Fáilte Ireland, the Office of Public Works, the National Transport Authority and other stakeholders on scoping and developing a Liffey Greenway (including potential looped trails where feasible) from the City Centre through the Liffey Valley to Celbridge.

While this is a long term objective with considerable access, topographical and environmental challenges and restraints (given that the Valley is subject to a Special Amenity Order), the proposition of a Liffey Greenway is well aligned with the re-positioning and diversifying of Dublin's offering articulated in the Destination Dublin report.

¹² Towards a Liffey Valley Park. ERM Ireland for the Steering Group of the Office of Public Works, and the Councils of Dublin City, Fingal, Kildare and South Dublin. 2006-8.

¹³ Liffey Valley Town Centre Local Area Plan. South Dublin County Council. March 2008

¹⁴ Shackleton Mills has been identified as potential visitor attraction development by Fingal County Council.

The proximity of this potential Greenway corridor to the large domestic and international tourism market in the City Centre can make the project sustainable from domestic as well as international tourists. The Greenway also presents health, transport and environmental benefits for modal shift from car-based to cycling/walking based travel that could serve as a secondary gain that could receive support from the National Transport Authority which has identified the Liffey Greenway in their Regional Cycle Strategy as a secondary regional route.

Initial actions to implement the Greenway:

- Establish a cross agency and stakeholder committee with high level representatives from required disciplines, including Fáilte Ireland and the Office of Public Works,
- Agree structures, owners/roles, monitoring mechanisms,
- Review the projects identified in the 2008 report *Towards a Liffey Valley Park*,
- Develop an agreed potential route and vision for the Greenway,
- Commence engagement with stakeholders,
- Agree upon viable routes, the product development interventions and costs,
- Screen environmentally,
- Agree upon the realisable objectives and draft a phased and costed multi-annual implementation plan,
- Identify and assign funding to a phased implementation of actions over 4 years, and
- Meet bi-monthly or as required to review.

- **Lucan Hub for Water-based Activities and Cycling** – canoeing and kayaking in the Liffey is already popular with Lucan as the central point. The opportunity exists to expand such activities through the provision of upgraded facilities (e.g. changing rooms at Lucan Demesne) and improved access.

Given the development of the Liffey Greenway discussed above, Lucan would be at the centre of a potential series of cycling loops with access to the Grand Canal via Vesey Park and Griffen Park, linking to the Royal Canal via Lucan Demesne – St Catherine's Park. Possible routes are:

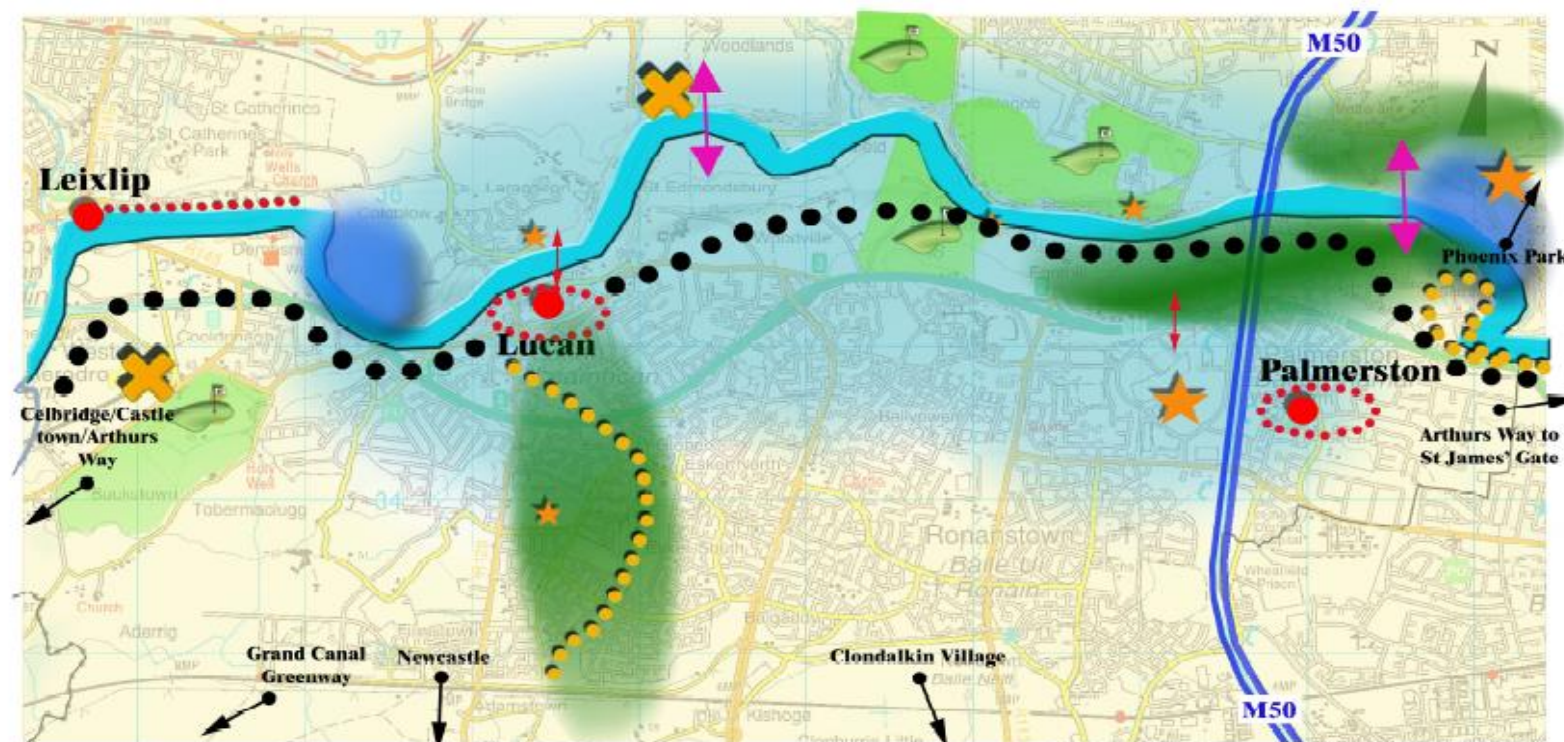
- i. City>Grand Canal>Lucan>Liffey>City,
- ii. City>Royal Canal>Lucan>Liffey>City, and
- iii. City>Grand Canal>Lucan>Royal Canal>City.

The final, long loop could be proposed to Fáilte Ireland as the Dublin Canals Greenway with Clondalkin and Lucan as loops off bringing benefit to villages in South Dublin.

- **Liffey Blueway** – In the medium term, consideration could be given to developing and promoting the concept of the **Liffey Blueway**. This concept would involve minimum intervention but would leverage existing usage on the river Liffey and high status events such as the Liffey Descent to develop market awareness.

Potential stages of the Liffey Blueway would connect villages and water courses from Lucan Demesne to Palmerstown/Farmleigh.

Liffey Valley Cluster



Key:



Table 6 Product:Market Matching – Liffey Valley Cluster

Markets/market segments Product	Domestic (Ireland), including Dubliners			International Leisure				Business		Sports	
	Connected Families	Footloose Socialisers	Indulgent Romantics	Social Energisers	Culturally Curious	Nature Lovers	Great Escapers	MICE Delegates	Other Business	Participants	Spectators
LIFFEY VALLEY CLUSTER											
Arthur's Way	✓	✓		✓	✓	✓	✓	✓	✓		
Liffey Villages	✓	✓	✓	✓	✓	✓	✓	✓	✓		
Liffey Greenway	✓	✓		✓		✓	✓			✓	✓
Lucan Hub: Water-based and Cycling	✓	✓		✓		✓	✓			✓	✓

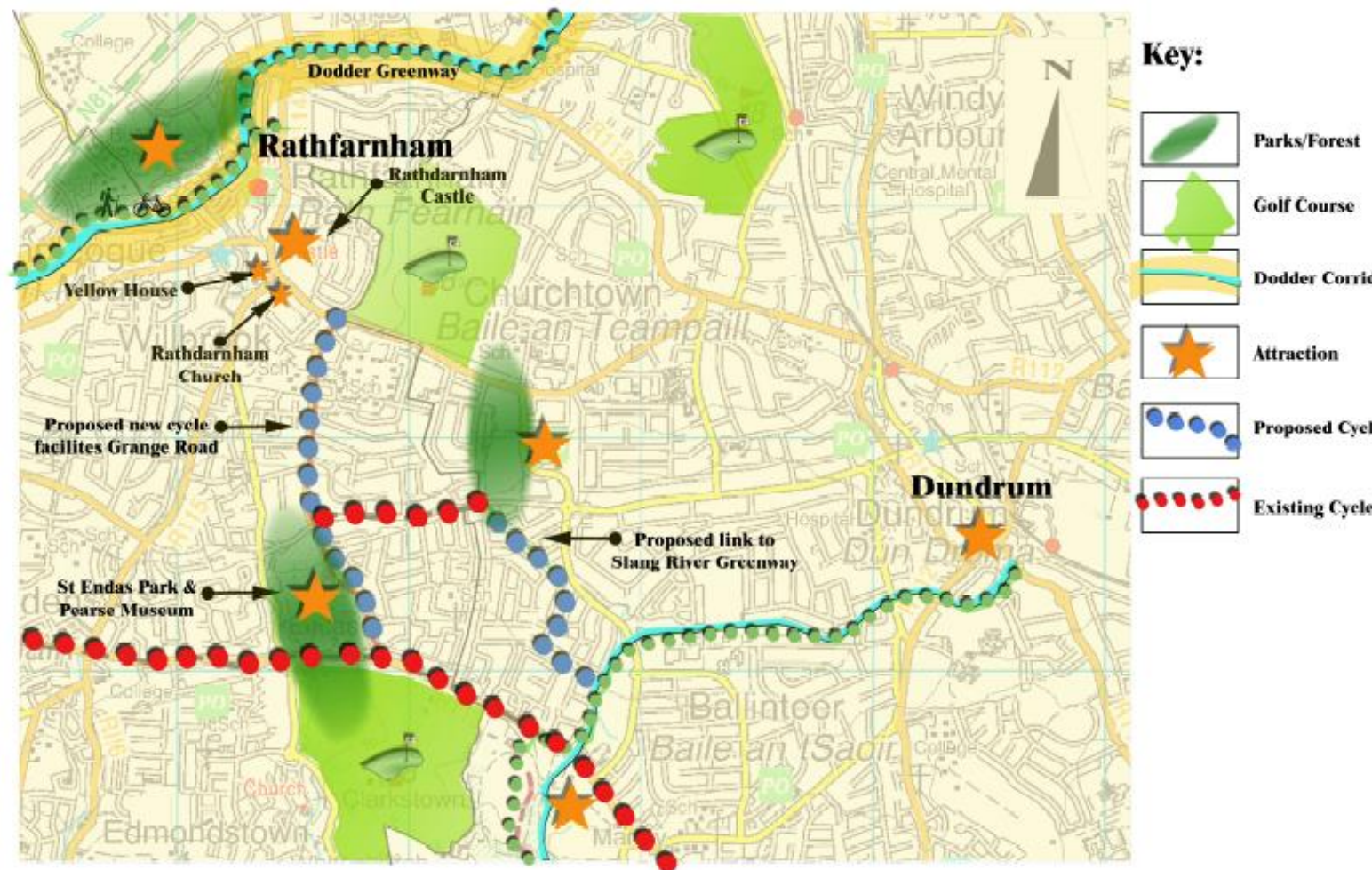


3.2.2 Rathfarnham/Marlay Cluster

The Rathfarnham /Marlay Cluster links a number of key features in Rathfarnham with the adjacent Marlay Park in neighbouring Dun Laoghaire Rathdown. This linkage serves to strengthen the cluster by capitalising on Marlay's success as a popular destination for Dubliners through its weekend market, success as a concert venue and take off point for the Wicklow Way.

Key product features are:

- **Rathfarnham Castle.** This State property is managed by the Office of Public Works. It has been undergoing restoration. The OPW are in the process of investing over €1 million in upgrading the Castle to enhance access to and within it, and improve visitor facilities, including tea rooms and toilets. The Castle would be an ideal venue for heritage-related or themed events. It is scheduled to reopen in June.



- **Rathfarnham Village.** The village has potential visitor appeal. Access to Rathfarnham will be facilitated, and its appeal enhanced, through the development of a number of looped trails linking the village with the Dodder River, Parks and attractions.
- **Access improvements.** The Council is currently working on plans to enhance access from the Village to the Castle. It is also working with OPW to open up visitor access within the Castle grounds. Proposals will examine:
 - Development of the Stable Buildings (for crafts, organic food etc), and
 - Improvements to car and coach parking.
- **St Enda's Museum.** Home of Padraic Pearse, Leader of the 1916 Rising and signatory to the Proclamation of Independence. This is another OPW property which has high significance from a historical perspective. Its problem is its location which is "off the beaten track". There is an immediate opportunity to capitalise on commemorative events planned over the next few years. The Museum is situated by St Enda's Park, and Loreto Abbey is close by.
- **Dodder Greenway.** The development of the Dodder Greenway – discussed later below – will be a component of the Rathfarnham/Marlay cluster as the river runs through Rathfarnham, nearby Templeogue and onwards to the Dublin Mountains. As such, it is a gateway to the mountains close to Rathfarnham,
- **Looped Walks.** Dundrum, the location of Ireland's largest shopping centre can be reached through a looped walk from St Enda's, continuing to Rathfarnham and the Castle back to the Dodder. A further looped walk includes Bushy Park and Rathfarnham Village.

Table 7 Product:Market Matching – Rathfarnham/Marlay Cluster

Markets/market segments Product	Domestic (Ireland), including Dubliners			International Leisure				Business		Sports	
	Connected Families	Footloose Socialisers	Indulgent Romantics	Social Energisers	Culturally Curious	Nature Lovers	Great Escapers	MICE Delegates	Other Business	Participants	Spectators
RATHFARNHAM/MARLAY CLUSTER											
Rathfarnham Castle	✓		✓		✓			✓	✓		✓
Rathfarnham Village	✓		✓		✓			✓	✓		
St Enda's Museum	✓		✓		✓			✓	✓		✓
Dodder Greenway	✓	✓		✓		✓	✓				
Looped Walks	✓	✓		✓	✓	✓	✓				

3.2.3 Tallaght – Activity and Sports Cluster

In the County town of South Dublin County, the principal access point by public transport and national highway structure into South Dublin, and the location of the main facilities and amenities in the County, Tallaght has an important role in the future growth of tourism into South Dublin. To date, there is a perception that Tallaght has suffered due to its image. There has also been a lack of cohesion in bringing together the attributes and strengths of Tallaght. The integration and collective marketing of the arts cluster (RUA RED, Civic Theatre, and County Library) will help make Tallaght:

1. A destination in its own right,
2. A hub for sports and activity tourism, and
3. A gateway into the Dublin Mountains.

To achieve these inter-related goals, a cluster of features in and around Tallaght linked by a common theme is needed. This is determined to be the outdoor activity and sports, for which Tallaght can serve as a hub. To complement the Outdoor activity and sports hub, additional product features will need to be incorporated in the Tallaght Cluster, namely: a heritage trail, arts centre, the retail sector and the proposed merger of the Institute of Technology with the Dublin Institute of Technology as part of the Dublin Technological University Alliance.

As a hub for sports and activity tourism, there will be a particular focus on the following sports tourism markets:

- **Team Sports (for Spectators)** – four components: *football* (Shamrock Rovers, other League of Ireland clubs, visiting British & European teams, plus junior and ladies international matches); *basketball* (based on the National Basketball Arena in Tymon Park); *minority team sports* e.g. American Football where the area has already achieved some success; and, *rugby* (using a “niche” approach of targeting pre-season Leinster games, junior and women's fixtures, rugby sevens, and rugby league fixtures),
- **Martial Arts (for Spectators)** – build on the existing track record in hosting National/European martial arts events e.g. Irish Open Kickboxing February 2013, WOMAA World Martial Arts Games August 2013, Adult and Junior World Kickboxing championships 2015,
- **Cycling and Walking (for participants)** – capitalise on Tallaght's proximity to the Dublin Mountains, and its central location for access to the County.

Key facilities and features to be developed to facilitate the creation of an activity and sports cluster in Tallaght include: four key measures as follows:

- **Construction of New Stand in Tallaght Stadium** thus extending the capacity of the ground to close to 10,000,
- **Multi-use Indoor Facility** capable of hosting a range of sporting events,
- **Outdoor Activities and Services.** To facilitate the expansion of outdoor activity participation and activity tourism, Tallaght will become the primary base for equipment hire, supporting services and information. Tallaght's proximity to the Dodder Greenway makes it an ideal base to service the needs of casual cyclists (through bicycle hire) and visiting anglers (information on access to angling, permits etc.)
- **Programing of Sports and Activity Events.** The proposed new County Promotion and Tourism Section within South Dublin County Council will work with the tourism industry in programming a range of high profile sporting and outdoor activity events. Such events are likely to include participatory events (i.e. Triathlon, Tough Mudder), and sports events.

In addition to the outdoor activities and sports elements, the additional developments needed to strengthen the Tallaght cluster and achieve it standing as the principal gateway into South Dublin are:

- **Heritage Trail** – Tallaght has a rich monastic heritage and was a centre for learning during the early Christian period. Its history is also closely tied up with the Mountains. These elements represent the potential for a heritage-based trail to be developed. Heightened awareness of the cultural and historical heritage associated with Tallaght through the showcase event in Tallaght Stadium in Heritage Week.
- **Arts Centre and Cultural Space** – the Civic Theatre, Rua Red and the County Library in Tallaght represent significant assets for the town and will be important components of the Tallaght cluster. This ‘arts and culture’ cluster can appeal to the culturally curious and other segments.

- **Education and Training** – the incorporation of the Institute of Technology Tallaght into the Dublin Institute of Technology and its consequent higher status represents the opportunity for Tallaght to become a centre of learning with an emphasis of tourism and hospitality learning.
- **Retail** – the retail offer is extensive and modern, a feature that can provide added value for Tallaght with some visitor segments.
- **Visitor Information Point** – South Dublin will need to provide on-the-ground visitor information services as visitor volumes grow. Tallaght is the logical location as it will be the entry point into the County for many of visitors.

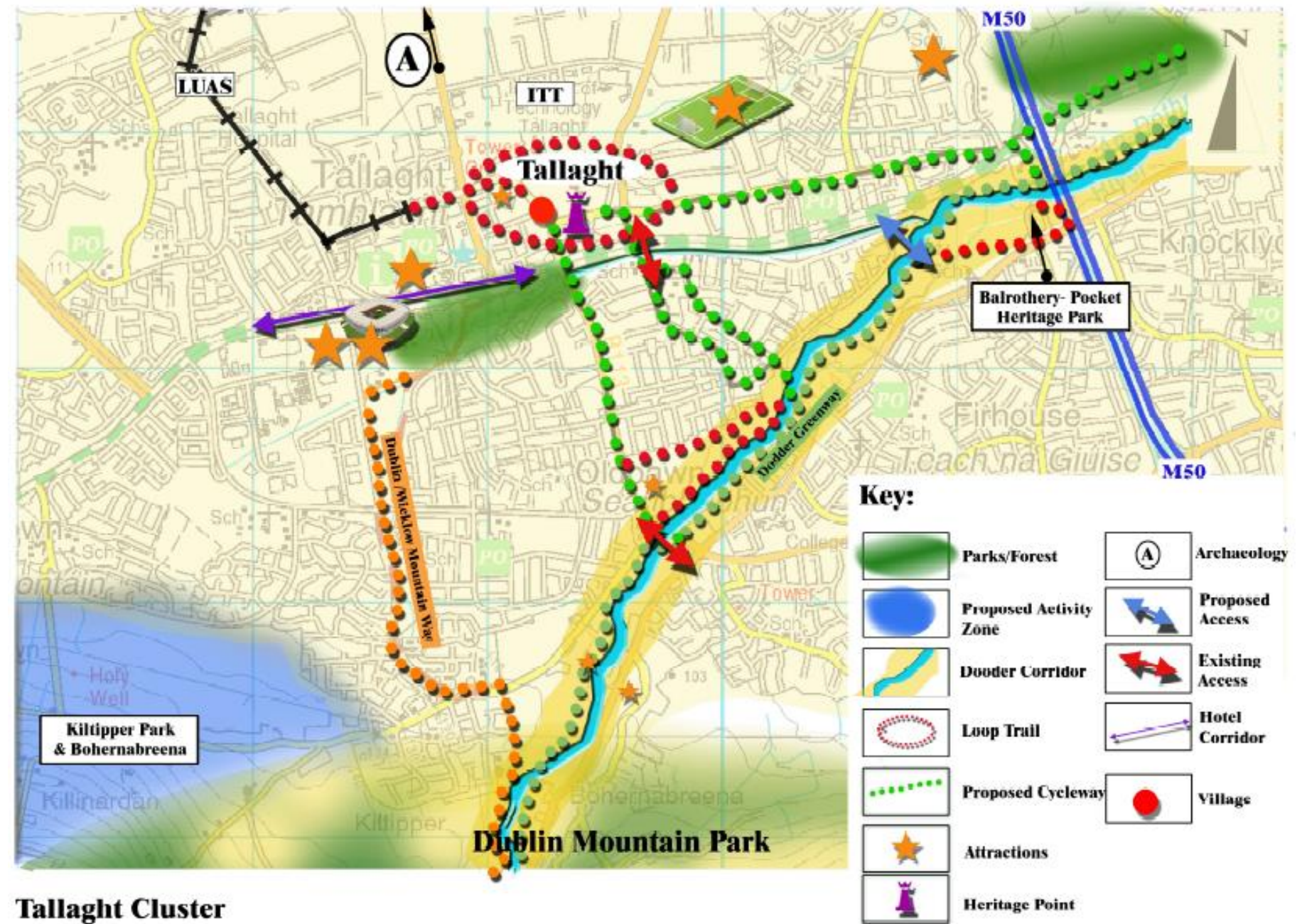


Table 8 Product:Market Matching – Tallaght Cluster

Markets/market segments Product	Domestic (Ireland), including Dubliners			International Leisure				Business		Sports	
	Connected Families	Footloose Socialisers	Indulgent Romantics	Social Energisers	Culturally Curious	Nature Lovers	Great Escapers	MICE Delegates	Other Business	Participants	Spectators
TALLAGHT CLUSTER											
Team Sports								✓	✓		✓
Martial Arts											✓
Cycling & Walking	✓	✓		✓			✓			✓	
Angling						✓					
Heritage Trail	✓	✓		✓	✓	✓	✓	✓	✓		
Arts Centre/Festival	✓	✓	✓	✓	✓			✓	✓		✓
Education and Training					✓						
Retail	✓	✓	✓	✓	✓			✓	✓	✓	✓

3.2.4 Grand Canal Corridor

The Grand Canal is an important asset for South Dublin. It has both natural and cultural heritage features that, with appropriate development and marketing, can provide for a wide variety of outdoor activities. To realise the potential for outdoor recreation and tourism, a range of interventions will be required including the creation of the necessary infrastructure, the provision of facilities, the clustering of activities in the form of trails and touring routes.

The village of Clondalkin will be developed as the 'hub' of the Grand Canal in South Dublin. By 'bundling' together the Grand Canal with Clondalkin, the intention is to create a critical mass of tourism and amenities in this part of the County.

The key features of the Grand Canal Corridor/Clondalkin cluster include:

- **Grand Canal Greenway** – In 2014, Waterways Ireland published a report '*Recreation, Tourism and Commercial Product Identification Study – Grand Canal Rural*¹⁵'. The report, which was prepared by Tourism Development International (TDI), identified a range of potential tourism and recreation activities which can take place on and beside the Grand Canal including:
 - **Range of boating activities** – Cruising, private boats, canoeing and kayaking,
 - **Angling** – The Grand Canal is a renowned coarse fishing destination,
 - **Walking** – Long distance walking routes and shorter trails,
 - **Cycling** – off road cycle routes
 - **Nature/Bird watching**

In the report '*Recreation, Tourism and Commercial Product Identification Study – Grand Canal Rural*', the proposed vision of for the Grand Canal (and Royal Canal) is:

'The repositioning of the canals from a transport waterway corridor to a branded recreational activity zone. This will be achieved through the development of a multi-use linear park linking Dublin's urban population with the River Shannon via an East-West Greenway PLUS network'

Key proposals include:

- **Inchicore to Grange Castle Upgrade** - the Grand Canal Green Route from the 3rd Lock Inchicore to the 12th Lock Lucan, a distance of 8.5km. This upgrade to Greenway standard was completed in partnership between ESB Networks, South Dublin County Council, Dublin City Council and Waterways Ireland and opened in June 2010.
- **Hazelhatch Harbour Development** - in fulfilment of the recommendation for the increased vibrancy of the Canal's harbours in the 2014 Waterways Ireland '*Recreational, Tourism and Commercial Product Identification Study on the Grand Canal Rural*' with lands zoned for the development of shops and restaurants, where appropriate.
- **Clondalkin Loop – Camac Greenway** - In order to enhance linkages and facilitate improved visitor and resident access, the development of a looped trail is proposed. From the entrance to Corkagh Park, through the Park, into Clondalkin Park on towards to the Grand Canal, back to the Round Tower down Ninth Lock Road.

The development of outdoor recreation on and around the Grand Canal is complemented by two significant historical/cultural offerings in Clondalkin – Clondalkin Round Tower and Aras Chronain.

- **Clondalkin Round Tower Project** – Clondalkin is home to a very well preserved Early Christian tower. To capitalise on this important historic landmark, and better cater for the needs of visitors, plans are at an advanced stage for the development of the Clondalkin Round Tower project.

This council led project will incorporate three houses adjacent to the Round Tower, and will include a range of facilities and services as follows:

- Interpretation of the site with focus on the Early Christian period
- Early Christian displays,
- Craft shop,
- Cafeteria,
- Multi-purpose space, and
- Outdoor areas.

The implementation of this project, allied to planned interventions to enhance the public realm adjacent to the Round Tower, will enhance Clondalkin's appeal and attract visitors to this part of the County.

- **Aras Chronain** – Aras Chronain is a significant amenity within the Clondalkin community. With support, it has the potential to play an important role in the development of cultural tourism in South Dublin. The Centre can contribute to tourism in two ways: first, as a key driver and focus of the proposed Fáilte Programme; and, secondly, through a programme of Traditional Music, Singing and Dancing at the new Round Tower Centre with musicians to be sourced by Aras Chronain. It could be a key point along the Gaelic Heritage Trail (along with St Enda's/Pearse Museum, Glenasmole Valley (the last area where Irish was spoken), and Gaelscoil in Tallaght. In addition to a trail concept, such a Fáilte Programme could also incorporate traditional entertainment, Irish language tutorials, and guided tours (in Irish and English).

¹⁵ Recreational, Tourism and Commercial Product Identification Study - Grand Canal Rural. Waterways Ireland

2014.
www.waterwaysireland.org/SiteAssets/documents/Product

Clondalkin is in relative close proximity to two other locations which have the potential to add to the 'cluster':

- **Baldonnell Aerodrome** is owned by the Department of Defense, It has a collection of old aircrafts and could have the potential to be developed as a visitor attraction (possibly including new features such as flight simulator

etc.). Together with the **Weston Aerodrome**, the two aerodromes form an aviation cluster offering active pursuits (e.g. parachuting, gliding, and ballooning) and passive aviation activities (e.g. Helicopter trips over Dublin Mountains and Dublin Bay).

- **Newcastle Village** is rich in heritage and archaeology with interesting farm settlements dating from the Norman period. Remains of the Pale Ditch are also evident.

Table 9 Product:Market Matching – Grand Canal Corridor

Markets/market segments Product	Domestic (Ireland), including Dubliners			International Leisure				Business		Sports	
	Connected Families	Footloose Socialisers	Indulgent Romantics	Social Energisers	Culturally Curious	Nature Lovers	Great Escapers	MICE Delegates	Other Business	Participants	Spectators
GRAND CANAL CORRIDOR											
Clondalkin Round Tower and Visitor Centre	✓		✓		✓			✓	✓		✓
Aras Chronain Attractions and Activities	✓		✓		✓		✓	✓	✓		✓
Clondalkin Loop – Camac Greenway	✓	✓		✓		✓	✓				
Inchicore to Grange Castle Upgrade	✓	✓		✓		✓	✓				
Newcastle Village			✓		✓			✓	✓		
Baldonnell Aerodrome	✓				✓			✓	✓		
Hazelhatch Harbour								✓	✓		
12 th Lock Redevelopment	✓	✓		✓							

3.2.5 Dodder Greenway Corridor

The creation of the Greenway along the River Dodder is a major, on-going project involving the NTA and Local Authorities. On its completion, it will link the City with Bohernabreena in the Mountains. This is a 'non-motorized communication cycling and walking route along the River Dodder'. The implementation of the Dodder Greenway proposals will reinforce the tourism positioning of South Dublin as a destination for outdoor activities.

In terms of product developments for this Corridor, the priority should be to support the implementation of the proposals as set out in the report *The Dodder Greenway- From the Sea to the Mountains*¹⁶. Increasing the tourism amenity is one of seven objectives outlined in that report "whereby the route will attract cycle tourists undertaking circuits through the Dublin and Wicklow Mountain", though all the objectives will make the area a more attractive one for recreational activity e.g. connecting areas of parkland, enhancing the ecological corridor, and becoming a Greenway of international renown.

The proposed Greenway from Dublin Docklands along the river Dodder to the mountains at Bohernabreena provides a unique cycling link between Dublin's Dockland heartland through many of its southside Victorian, Edwardian and 20th Century suburbs to the new suburb of Tallaght in south west Dublin and ultimately the start of the Dublin and Wicklow Mountains at the Bohernabreena Reservoir, and the Dublin Mountain Way¹⁷. The proposed Greenway encompasses a journey along one of Dublin's historic rivers, almost entirely off road and through public parkland and, at one end, South Dublin countryside and mountain landscapes. As well as offering an interesting and enjoyable commute to daily users, it also offers a distinctive new experience of Dublin to visitors and residents alike¹⁸.

The Dodder Greenway report highlights the opportunity for Greenways to support grassroots through the creation and promotion of environmental tourist products, with all tourist products along them sharing the principle of using local potential and supporting local communities since they are created with local resources: tourist services, cultural opportunities, local products and point of sale, as well as other community initiatives.

Within South Dublin, the key features to be developed include:

- **Cycling and walking route:** access points at Rathfarnham, Bushy Park, Balrothery Weir at Firhouse, Red Bridge, and Old Mill.
- **Signage boards** at access points along the route indicating features of interest to tourists. This includes: the distinctive villages of South Dublin along or adjacent to the Corridor, namely Rathfarnham, Templeogue, Terenure, and the County town of Tallaght, linking to the Tallaght Activity and Sport Cluster; and the iconic landmarks of Rathfarnham Castle, Bushy Park, Balrothery Weir at Firhouse, Kiltipper Woods and Bohernabreena Reservoir.
- **Cycle hire facilities**, Tallaght and Rathfarnham would be logical locations for cycle hire facilities to be provided by local entrepreneurs.
- **Sheltered stops** along the route enabling visitors to rest and appreciate the rich ecological habitat,
- **Angling access points** facilitating fishing for brown trout and mullet. In this regard, Inland Fisheries Ireland has identified investment in improvements to fish passages as a priority.
- **Strong engagement by local businesses** in order to gain additional custom from participants using the Greenway Corridor. The Taff Trail between Cardiff Bay and Brecon in South Wales, albeit three times the length of the Dodder Greenway Corridor, is cited as example of a cycling trail bringing significant benefits for local businesses through 628,000 visits a year generating an additional spend locally of £21 million¹⁹.
- **Different trail types or themes** e.g. Dodder food/drink trail, Dodder craft trail, Dodder nature trail, Industrial Dodder trail, Dodder Castles trail were identified for consideration in the Dodder Greenway report²⁰, etc., though the principal attraction will be to the discerning green and health-aware user, whether local resident or outside visitor.

¹⁶ River Dodder Greenway from the Sea to the Mountains. Roughan & O'Donovan for South Dublin County Council. January 2013.

¹⁷ Ibid

¹⁸ Ibid

¹⁹ Ibid

²⁰ Ibid

Table 10 Product:Market Matching – Dodder Greenway Corridor

Markets/market segments Product	Domestic (Ireland), including Dubliners			International Leisure				Business		Sports	
	Connected Families	Footloose Socialisers	Indulgent Romantics	Social Energisers	Culturally Curious	Nature Lovers	Great Escapers	MICE Delegates	Other Business	Participants	Spectators
DODDER GREENWAY CORRIDOR											
Cycling and Walking Route	✓	✓		✓		✓	✓				
Angling						✓	✓				
Themed Trails	✓	✓		✓	✓	✓	✓				

3.2.6 Slade Valley Corridor and Heritage Trail

The *Slade Heritage Trail Feasibility Study*²¹ commissioned by South Dublin County Council outlines both the key components and proposed developments of the Trail. The Slade Valley (also known as the 'Slade of Saggart') runs for 6 km linking the villages of Brittas, Saggart, and Rathcoole, which have a shared cultural and historical heritage founded on strong community and parish links can be strengthened. Saggart and Rathcoole will be the hub of the Slade Valley corridor.

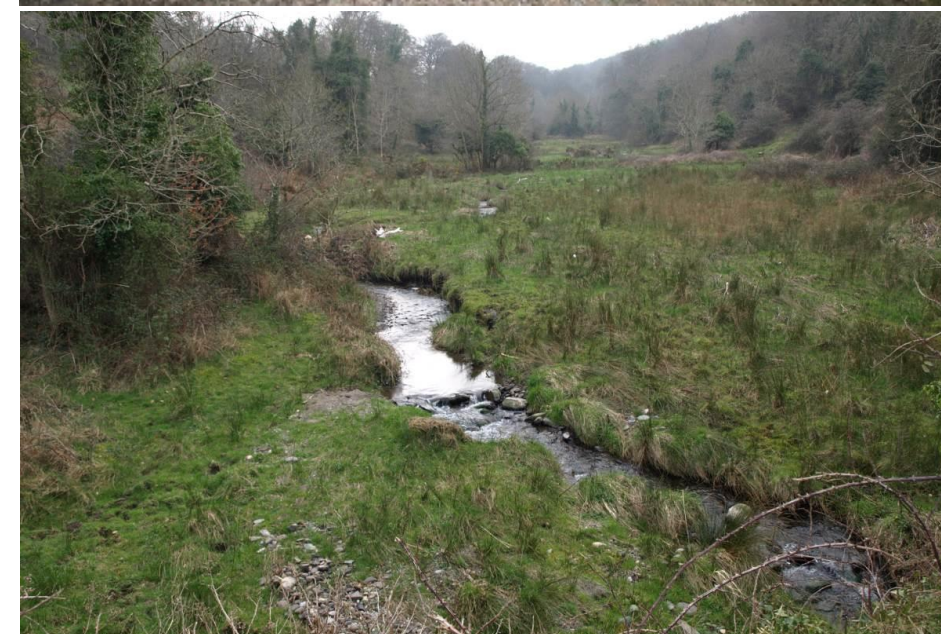
The objectives and expected benefits to the proposed Slade Heritage Trail, as set out in the Feasibility Study²² are to:

- Re-establish the links between the three village communities of Saggart, Rathcoole, and Brittas and the promotion of their shared cultural and historic heritage,
- Provide an enjoyable experience of nature – the Trail would allow people to sensitively access an area rich in biodiversity and natural heritage,
- Encourage active and healthy lifestyles through recreational use of the Trail,
- Showcase the heritage of this area of South Dublin County in a broad sense – cultural, environmental, archaeological, architectural and historical,
- Enhance the tourism potential and economic development potential for the local community, and
- Offer future potential links with other walking trails and heritage routes in this area of South Dublin County and adjacent counties.

The development of the Slade Heritage Trail would be a valuable addition to the proposed suite of clusters and trails available to local residents and visitors alike in South Dublin. Its key components would include:

- **Slade Heritage Trail will encompass the full range of natural, cultural, architectural and archaeological features.** The proposed route through the Slade Valley will offer primarily a natural heritage interest while the remainder of the trail through the villages will focus on the built heritage of these communities. The Trail through the Slade Valley would follow an older route which once formed the main Bianconi coach road between Saggart and Blessington, prior to the development of the N81 which currently overlooks the Slade Valley,
- **Surfaced walking and cycling trail** developed to the highest standard and best practice, running from Rathcoole Park / Avoca via Saggart to the Slade Valley, Brittas Ponds and Brittas Village,
- **Investigation of additional loops to the main trail.** Examples for mountain bikers include: e.g. a loop through woodlands at Crooksling/Verschoyle's Hill east of the Slade Valley, or a loop through commercial Coillte woodlands at Coolmine/Lugg Hill west of the Slade Valley,
- **Future link into existing walkways** e.g. Dublin Mountain Way, Grand Canal Way, and

The first priority is to determine the precise route of the Slade Heritage Trail will be decided upon based on considerations such as rights of way, access consultation with landowners, costings, special interest groups to be catered for, and protection of sensitive natural habitats, Protected Structures, and Recorded Monuments etc.



²¹ Slade Heritage Trail – feasibility study. Cunnane Stratton Reynolds-led consortium for South Dublin County Council. Draft September 2014

²² Ibid

Table 11 Product:Market Matching – Slade Valley Corridor and Heritage Trail

Markets/market segments Product	Domestic (Ireland), including Dubliners			International Leisure				Business		Sports	
	Connected Families	Footloose Socialisers	Indulgent Romantics	Social Energisers	Culturally Curious	Nature Lovers	Great Escapers	MICE Delegates	Other Business	Participants	Spectators
SLADE VALLEY CORRIDOR AND HERITAGE TRAIL											
Heritage Trail	✓	✓		✓	✓	✓	✓	✓	✓		
Walking and Cycling Trail	✓	✓		✓		✓	✓				
Brittas Ponds						✓	✓				

3.3. Supporting Cultural Heritage Initiatives

South Dublin Heritage Plan 2010-2015 details the built, natural and cultural heritage of the area of the present day South Dublin County over the centuries. It represents a sound starting point for the identification of features with tourism potential.

By reviewing and enhancing the historical and heritage offering with tourism potential, improving access and visibility, and utilising strategic partnerships, South Dublin can create a substantive historical and heritage visitor product offering.

This will entail re-orientation of the Local Studies function at the County Library to focus on research and interpretation of the County's heritage with tourism potential; and working in partnership with community heritage groups, University College Dublin (on archaeology and folklore) and the Heritage Council to excavate, interpret and authenticate key heritage sites with access issues but tourism potential e.g. Dublin Mountains, Newcastle, and the Office of Public Works in the enhancement of public realm gateways and village connectivity to St Enda's/Pearse Museum and Rathfarnham Castle.

3.3.1 Complete and Extend Existing Initiatives

There are a number of important ongoing or planned initiatives in respect of South Dublin's historical and cultural heritage (e.g. Clondalkin Round Tower Heritage Project, Community Archaeology Project, Irish cultural heritage resources of Clondalkin village). These need to be fully supported, added to through collaboration with local groups, coordinated, and marketed to a range of market segments including the Culturally Curious, with the view to persuading such visitors to Dublin to complete their visit to the area by taking in the cultural heritage features of South Dublin.

3.3.2 Arthur's Way

Themed trail set up in County Kildare that features points/places associated with Arthur Guinness. Arthur's Way will constitute part of the Liffey Valley Cluster.

3.3.3 Cultural Events and Performances

Organisation of performances and other events related to the Irish language and traditional music and dance using the Irish Cultural Heritage resources of Clondalkin Village at Aras Chronain.

3.3.4 Best Villages

Establish a "best village" competition to encourage communities to present their villages in the best possible light through access and environment improvements, activities, events etc.

3.3.5 Themed Circuit and Trail Development

Though most of the potential trails combine historical/cultural heritage features with natural elements, there are a number that are primarily focused on the area's, history and traditional culture. Among the possible themed trails to be considered for development and marketing are the following that go beyond the existing village trails:

- 'Great Vires of Dublin Circuit,
- Monastic Trail/Two/Three Towers Trail, and
- Industrial Heritage Trails adjacent to the rivers.

3.3.6 Shackleton Mill Restoration

This visitor attraction development will be led by Fingal County Council. Access from the northern side is a major challenge. This could be overcome through a new footbridge across the Liffey from the South Dublin side – a development on which Fingal County Council has indicated it would be willing to collaborate with South Dublin County Council and could be addressed as part of the overall Liffey Greenway proposal.

3.3.7 Implement Actions to Make Key Heritage Locations Accessible

Through identifying and ranking heritage sites not presently accessible; approaching private owners of key heritage features and buildings for incremental access; utilising the public realm function to tidy and make accessible sites such as the Norman Church ruins and the Mill Lane, Palmerstown graveyard; and resolving the access issues delaying the implementation of the Slade Valley Heritage Trail.

3.3.8 Heritage Pubs

Maximise the potential of traditional pubs with historical interest.

3.3.9 Increased Visibility and Awareness of South Dublin's Heritage:

- **On the Ground** – through the development of an Irish cultural space in Tallaght which can also serve as the physical **tourist information point** for heritage with County heritage map, booklets, exhibits, interpretative panels and materials; and a visitor centre associated with the Clondalkin Round Tower
- **Online** – through the creation of an accessible, authoritative and visually driven heritage tourism website; development of a heritage app for the themed trails; and use of StoryMap (or equivalent packages) to enable the County's tales/stories to be uploaded in order to create awareness among the younger user;

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- **In the Community** – through use of Phase 2 of the Village Signage Programme to place interpretative plaques at places of historical, cultural and natural interest; hold a showcase event in Tallaght Stadium in Heritage Week August 2016 – South Dublin's Story – Our Heritage; use the planned Community Archaeology Project to heighten awareness of the Dublin Mountains and heritage as a tourism asset for the community; and implement the Heritage Plan objectives for local school tours, and transition year talks, to develop pride of place and create advocates of the County's heritage among the younger generation.

3.4 Increase and Improve the Food and Evening Entertainment Offer

Food and drink are elements that all visitors to a destination experience, irrespective of their purpose of visit. Similarly, with most visitors pursuing their interest during daytime, there is the need for activities in the evening. The existence of locally-sourced foods, recipes and drinks, and traditional music and dance performances represents an expression of a destination's cultural heritage while the dining experience comprises not solely the consumables but also the ambience, entertainment and service. In consequence, many destinations are placing an increased emphasis on their offering in food and drink, and evening entertainment. This is an area where South Dublin is lacking: the present offering is adequate but not outstanding. The goal is to elevate the combined offering of food and drink and evening entertainment to a level where it represents a significant part of the County's product offer for visitors.

Three principal recommendations are:

- Establish a **South Dublin Marque membership scheme** for individualised restaurants and pub restaurants based on the criteria of using local ingredients, offering both traditional and international dishes, providing professional and personable service and offering good-value-for-money.
- **Focus on quality food offering in the Liffey Villages programme** on the quality food offering in the villages along the river, with Lucan as the hub – details as in sub-section 3.2.1.
- Support will be provided for these food related initiatives through LEO and its **Food Network**.
- Organise and publicise through digital, radio and print media a **weekly "what's on" schedule** of evening entertainment in pubs, theatres and cinemas.

3.5 Events and Festivals

South Dublin Tourism had a strong track record of attracting events to the County prior to the incorporation of its functions within the Council. The County has historically done less well in organising festivals that have attracted visitors from outside the immediate region. The tourism strategy requires the achievement of two goals: first maintaining the reputation of South Dublin as a venue with good facilities for medium and large events of up to 10,000; and, second, expanding the range of festivals and events attracted as a means of enabling participants to "get a taste" of South Dublin, encouraging them to make a longer return visit.

The principal recommendations relating to exploiting the potential of the events and festivals, including those with a focus on the outdoors, to grow tourism in South Dublin are:

- **Work with local communities and interest groups** in: identifying the opportunities for themed festivals and events, assisting in their organisation and management, and undertaking marketing and promotional support,
- Organise and promote a **calendar of festivals and events** (weekly, monthly and annual) to attract both first time and repeat visitors, related to outdoor activities, nature and cultural themes, and for both the outdoor pursuits enthusiast and the general interest visitor, with specialised versions for arts and culture, outdoor pursuits, evening entertainment etc. The Isle of Wight represents a model for South Dublin in the promotion of its themed events²³.
- **Work with the operators of facilities in the County that cater for national and international events** to build and maintain contact with the organisers of such events. Note: The establishment of the proposed Dublin Mountains Outdoor Activity Centre will strengthen the outdoor tourism infrastructure in the County.



²³ <http://www.visitisleofwight.co.uk/events>

3.6 MICE and other Business Tourism Initiatives

One of South Dublin's strengths is the extensive hotel and related conference provision. These cater for business visitors visiting the County's industrial and commercial operations, or to attend a business event. The goal related to the meetings, incentives, conventions and exhibitions (MICE) sector is to develop a coordinated series of events, expanding the range and number developed through South Dublin Tourism. A second goal is to create an effective "bridge" between business visitors to hotels and the County's attractions and activities in order to provide a menu of opportunities of things to see and do, and facilitate the booking and making of arrangements for such activities.

The overriding recommendation is the **strengthening of communications links and operating procedures between the tourism function in South Dublin County Council, South Dublin Chamber and the hoteliers and conference facility operators** is vital. This can be achieved through both a formal Business Tourism Committee dealing with broader strategic issues and programmes, and individual discussions related to specific events.

The Council: hotel/conference operator relationship is manifested in two ways:

- Close liaison with hoteliers and other business interests in **liaising with the organising bodies of international, national, and regional meetings, incentive trips, conferences/conventions, and exhibitions** to determine the necessary organisational, financial and marketing support to win such events for South Dublin.

- **Provision of information to hoteliers on tourism attractions and activities, events/festivals** – through tailored online material incorporated in hoteliers' in-room web material, brochures/leaflets available in-room and on reception/concierge desks - **and the means of accessing such activities**, through online booking, or via hotel staff.

3.7 Broaden and Personalise the Range of Accommodation

While South Dublin offers a large hotel room stock relative to the size of its non-business tourism sector, the range and capacity of other forms of commercial accommodation are small. The goal is, therefore, to broaden the range and scale of informal and non-hotel lodging that caters, on one hand, for visitors looking for a different form of accommodation that reflects the destination (e.g. Great Escapers, Nature Lovers) and, on the other, for groups of outdoor activity enthusiasts who want budget accommodation offering basic but clean facilities.

In order to diversify the range of commercial lodging facilities in South Dublin, it will be necessary for the Council to:

- **Encourage prospective developers/operators** to create diverse forms of accommodation in line with market requirements **through the operation of workshops, dissemination of information on exemplars, and an advisory service,**
- **Support the development and marketing of characterful forms of lodging that reflect the nature and cultural heritage of South Dublin.** This can be achieved through locations in natural settings, in rural areas (including on farms); through the use of traditional building materials; and/or the conversion of old buildings.

3.8 Boost the Rural Areas through Agri-Tourism

South Dublin retains a strong rural environment with small farms scattered around the lower levels yet within a 10 to 15 km radius of Dublin city. The opportunity for segments like the Great Escapers and Nature Lovers to be able to be in the heart of the countryside within a 30 to 40 minute journey is not presently realised. There are two goals: first, to create an expanded and diversified agri-tourism sector providing, on one hand, recreation and education for visitors while, on the other, supplementing farmers' income; and, second, to establish a strong reputation for South Dublin's agri-tourism based on the local provenance of produce from the farms and crafts reflecting the rural traditions of the County.

The recommendations to meet these goals are linked to the creation of a South Dublin Marque for food and drink, and crafts, with a local provenance, as outlined in sub-section 3.4. and the development of characterful lodging, including on farms, covered in sub-section 3.5.

In addition to these recommendations, further proposals to boost the agri-tourism sector are to:

- Establish a regular **Farmers' Market** to provide an outlet for produce from local farms and gardens
- Create a **catalogue of farms and other rural attractions** where visitors can engage in a range of "hands on" seasonal activities.

3.9 Focus on Strengths in Education and Training

The raised status and capability of the Institute of Technology, Tallaght, following its incorporation into the Dublin Institute of Technology, presents the opportunity for South Dublin to generate its own skilled tourism and hospitality personnel suite of courses organised at the Institute. This should be the goal with the Tourism Industry Group, working closely with the ITT in developing the range of courses needed to produce the skilled staff for the industry, thereby establishing the ITT as a premier institution for a full range of tourism technical skills.

A second goal relates to language training: expanding English language training for foreign students; and setting up Irish language courses and programmes for children in order to capitalise on the strong Irish speaking tradition in South Dublin (Clondalkin, Gaelscoil in Tallaght).

The demise of CERT and the withdrawal of Fáilte Ireland from hospitality and catering training has resulted in tourism operators experiencing difficulties in recruiting “ready to go” staff.

The Dublin Institute of Technology, incorporating ITT, can fill the vacuum left by the closure of CERT. The recommendation is for the establishment of a College of Tourism and Food in Tallaght offering a full range of tourism and hospitality courses developed in consultation with the Tourism Industry Group to address their needs.

The organisation of an expanded provision of English language training for foreign students through ITT billeted to homes in and around Tallaght would bring more visitors to the area.

Irish language courses and programmes for children drawn from other parts of Dublin and around the country would also bring in additional visitors to the area.



4 Recommended Goals and Strategies: Access and Infrastructure

4.1 Establish a Network of Visitor Information Points

The goal is to provide ready access to visitor information – both online and at key points in the County, two such places being Tallaght which is served by most public transport services to the County, and the site of the Dublin Mountains Visitor Interpretation and Orientation Centre, where most discretionary visitors to the County are likely to visit.

4.2 Improve Transport Facilities and Services within the County

The goal of assisting visitors without their own transport to see the main sights and have access to the prime areas for outdoor activities can be met through a mini bus shuttle service linking the hotels and principal urban centres with sites of tourist interest. A 'Dublin Mountains Shuttle' might be established initially as a trial venture in association with the County's hoteliers and tour excursion operators.

For visitors travelling independently in their own motorised vehicles, a touring route that meets three objectives is proposed: it should offer visitors the chance to see the key sites in the County, it should use roads with a reasonable level of parking and other facilities, and it should avoid roads and areas that can cause environmental degradation through motorised vehicle use.

4.3 Create Comprehensive and Standardised Orientation and Tourist Site Signage

There are two interconnected goals: first, the establishment of clear and connected directional signage to assist visitors travelling independently to plan their itineraries and move readily from place to place; and, second, distinctive signage to tourists attractions and activities that is consistent and instantly recognisable (and in line with national guidelines and requirements).

4.3.1 Territoriality and signage

Visitors do not recognise administrative boundaries. Local authorities however do. If the collaborative approach advocated through the Grow Dublin Alliance and DTTAS National Tourism Policy is to be meaningful, bordering local authorities will have to take a supportive attitude to providing signage to bordering attractions.

The Dublin Local Authorities should have as a key immediate joint operational objective;

- Review brown amenity related signage in border areas and submit a composite report to the NRA outlining new signage requirements,
- Existing local authority boundary signage must be removed, and
- Branded Dublin signage (subject to GDA Brand) must replace local authority signage at Gateways, to orientate visitors that they are in the Dublin area.

4.3.2 Signage and access

South Dublin County Council should:

- Capitalise upon its accessibility and large through traffic by undertaking its own review of brown amenity signage to attractions off national routes in South Dublin County – Dublin Mountains, Liffey, OPW sites, Round Tower etc. and request that new signage to these attractions be erected by the NRA,
- Continue to implement the Village Signage Programme in consultation with communities,
- Implement Interpretative Heritage Boards/Signage in Villages to make its Heritage more visible (including Natural Heritage at key locations, mountains, canal, rivers, parks),
- Develop and implement branded signage and interpretation for the products articulated in this strategy – Liffey Villages, Dodder Greenway etc., and
- Conduct review of signage orientation annually to identify signage gaps – could a visitor easily find their way around the County?

5 Recommended Goals and Strategies: Organisation, Management and Implementation

The establishment of the Grow Dublin Alliance and the adoption of a *Collective Strategy for Tourism Growth to 2020* is a positive move for South Dublin and the other counties in the greater Dublin Area. Grow Dublin is one of Fáilte Ireland's three signature projects. There is strong stakeholder support for a collaborative 'one Dublin' approach.

While Fáilte Ireland has set up a dedicated Dublin team, strengthened institutional arrangements will be required in South Dublin in order to drive tourism forward and oversee the product development and marketing recommendations as set out in this strategy. Such arrangements will require **South Dublin County Council playing a key leadership and coordination role**.

Establishing the organisational and management structures and procedures to achieve this role; and creating a mechanism to facilitate tourism industry participation and collaboration are the overriding goals for South Dublin County Council.

Organisation recommendations for tourism in South Dublin are:

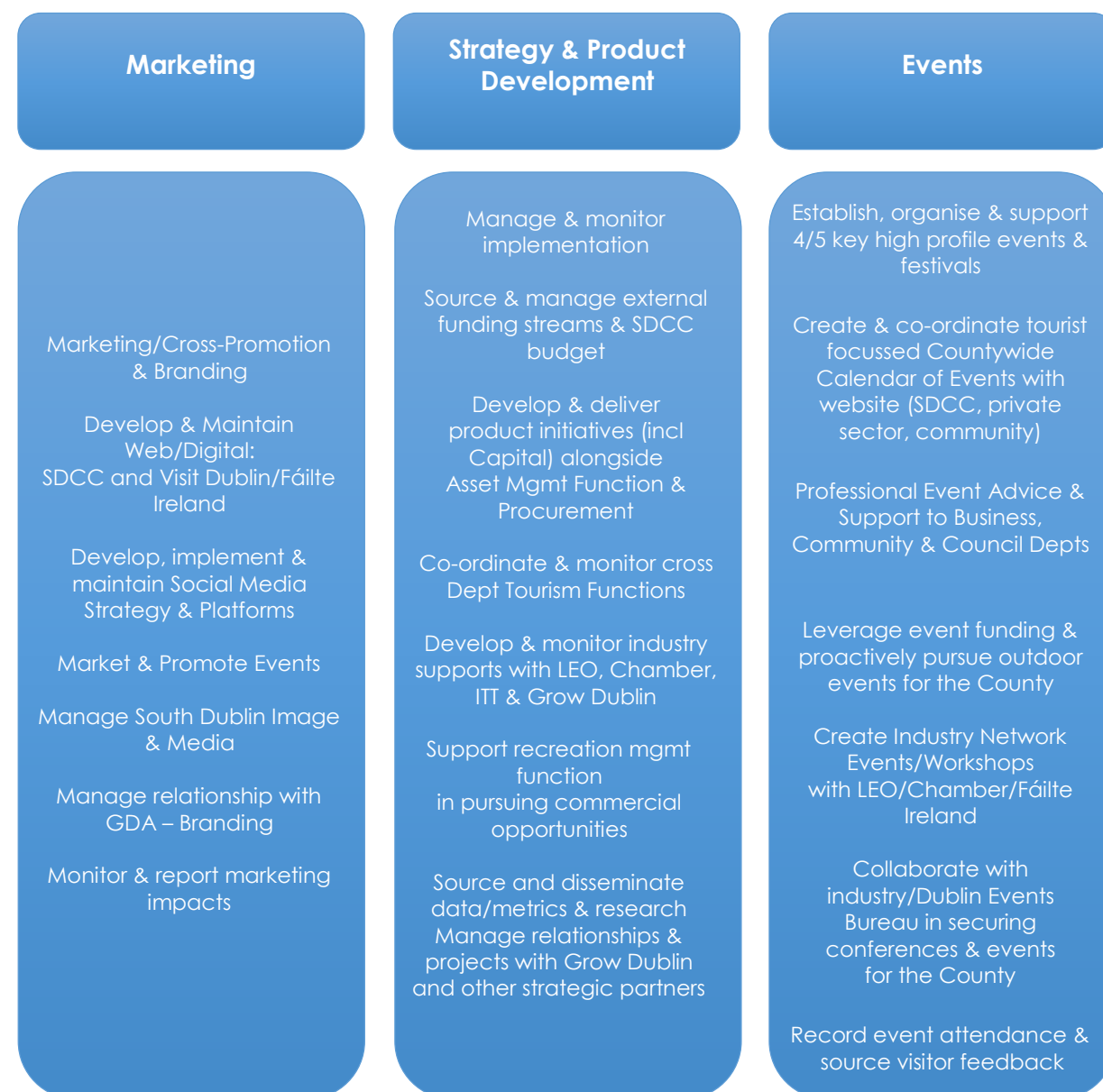
- To establish a dedicated **County Promotion and Tourism Section** within the Economic, Enterprise and Tourism Development Department of South Dublin County Council,
- To establish a **South Dublin Tourism Industry Group** as a sub-committee of the South Dublin Chamber, and
- To seek and build a series of **strategic partnerships** to ensure the optimal development of a strong sustainable tourism sector in the County.

5.1 Set up a Dedicated County Promotion and Tourism Section within South Dublin County Council

The establishment of a dedicated County Promotion and Tourism Section within South Dublin County Council is in keeping with the Council's economic development remit. In a highly fragmented industry such as tourism, the County Promotion and Tourism Section will have responsibility for coordinating a range of development and marketing actions, collaborating with, and facilitating, the private sector, and liaising with the Grow Dublin Alliance and Fáilte Ireland. The proposed establishment of a dedicated section for tourism within South Dublin County Council is consistent with the approach now being adopted by other local authorities. Following the completion of the *Tourism Strategy for South Dublin County*, implementation of the phased Action Plan shall be the focus of the new Tourism Section. It will also promote and promulgate the economic benefits of tourism and the need for close stakeholder collaboration too.



5.1.1 Functions of the County Promotion and Tourism Section



Marketing. The Tourism Section will be responsible for the implementation of marketing, promotional and branding activities in collaboration with other corporate function. This key function includes the creation and maintenance of marketing platforms and digital marketing activities.

Through the County Promotion and Tourism Section, the Council will give consideration to supporting marketing initiatives and campaigns organized by the South Dublin Tourism Industry on a matching funding basis where such initiatives add value and support to the overall development and growth of tourism in the County.

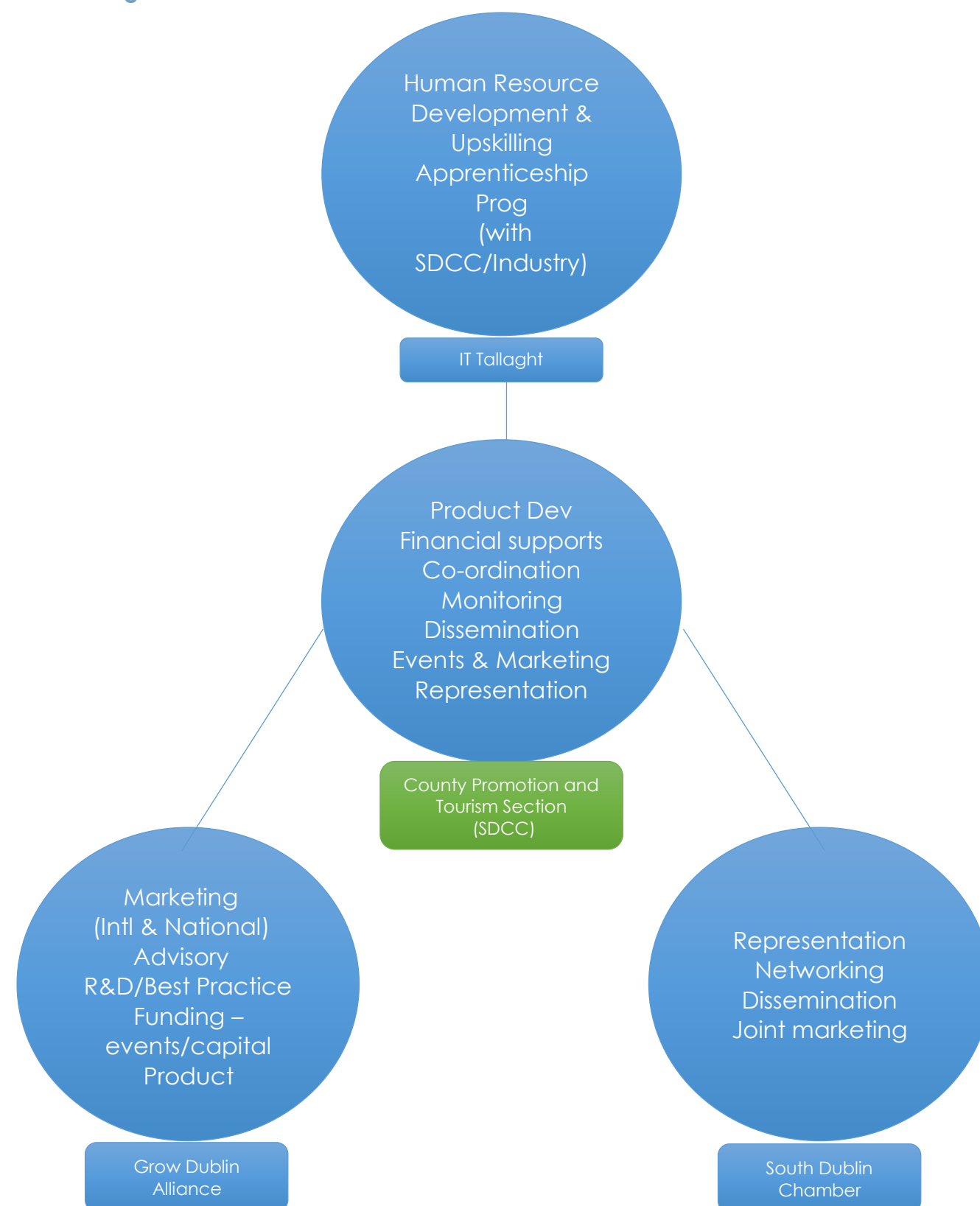
The marketing function will be underpinned by a dedicated corporate social media marketing resource. The County Promotion and Tourism Section will partner with D.I.T. (Tallaght IT) with a view to establishing an effective digital marketing capability.

Strategy and Product Development. Investment in the tourism product will be required over the period of this strategic plan. The County Promotion and Tourism Section will be responsible for overseeing the development of new tourism facilities and products in South Dublin – in other words *‘Things for visitors to see and do’*. The product development function will include the drafting, processing and implementation of tourism development plans [i.e. for the Dublin Mountains Park flagship attraction, clusters, looped trails, and visitor facilities etc]. The County Promotion and Tourism Section will also be responsible for the identification and preservation of tourism assets in South Dublin. It will be responsible for sourcing capital funding for tourism projects under the Tourism Capital Investment Programme. In this regard, close collaboration will be required with Fáilte Ireland in the task of planning and funding new tourism product development.

Events. The County Promotion and Tourism Section will be responsible for the development and marketing of a Calendar of Events. It will have a role in the organization and management of a number of ‘flagship’ sporting and cultural festivals and events and will provide support to other events that have the potential to attract and/or cater for visitors. Through selective targeting of events and other initiatives, the Section will also seek to support community tourism in South Dublin.

Conference and Business Tourism. Business tourism is of central importance to South Dublin. The County Promotion and Tourism Section will support the hospitality sector in its efforts to grow business and conference tourism. This will be achieved through the provision of logistical support for familiarization visits and support in bidding/tendering for conferences or trade shows.

Strategic Role in Dublin and South Dublin



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5.1.2 Structure and Resources of the County Promotion and Tourism Section

While the activities of a number of different Directorates and sections in South Dublin County Council overlap with tourism, at present there are no resources in-house dedicated specifically to tourism. A fully resourced County Promotion and Tourism Section within the Council should comprise:

- **Tourism Manager**
- **Tourism Development Officer**
- **Tourism Marketing Officer**
- **Business Tourism / Events Officer**

In addition to those personnel employed full time in tourism, it would be essential that the tourism team would work closely with other directorates and sections in the Council. The County Promotion and Tourism Section will depend heavily on many functions in the Council to deliver the Tourism Strategy. Plans that influence the annual operations of departments and daily activities of staff will, by necessity, contain actions and assign owners of tourism related priorities from the Tourism Strategy. The County Development Plan (currently under review), and Local Economic Plan (in development) are opportunities to embed and deliver the strategy.

5.2 South Dublin Tourism Industry Group

The South Dublin Chamber of Commerce is the prescribed organization in the County for business representation. It has had a long history of involvement in tourism in the County through its support for South Dublin Tourism. It is recommended that the Tourism Sub-Committee of the Chamber be reactivated as the **South Dublin Tourism Industry Group [TIG]**.

The TIG will play a lead role in driving collaborative marketing campaigns for South Dublin as part of a one Dublin Approach. The TIG will agree a programme of marketing actions with the County Promotion and Tourism Section and Fáilte Ireland and meet on a bi-monthly to review same. Sub groups of TIG are likely to be required on priority areas such as food development.

The County Promotion and Tourism Section will also act as secretariat to the TIG. The relationship between the parties will be underpinned by a Memorandum of Understanding.

5.3 Strategic Partnerships

In addition to the establishment of the County Promotion and Tourism Section in South Dublin County Council and the South Dublin Tourism Industry Group, strategic partnerships will be required to implement key objectives. The following are proposed:

5.3.1 Regional Networking & Local Authority Working Groups

It is recommended that all Dublin Authorities should meet quarterly to drive agreed tourism development agendas. The councils should seek a collective quarterly meeting with Grow Dublin.

5.3.2 Regional Access Projects

Consideration could be given to the Planning and Economic Development functions in Dublin City Council, Kildare, Fingal and South Dublin County Council jointly preparing, supporting and submitting bid proposals to the National Transport Authority **and** Fáilte Ireland where the delivery of a access projects would have strategic **regional** benefits in modal shift **and** tourism development as in the case of the Dodder Greenway. The example of the Great Western Greenway which was jointly funded by local authorities, Fáilte Ireland and the Department of Transport represents a valid exemplar. Collaboration on practical measures such as signage and cost sharing on joint marketing initiatives should also be explored.

5.3.3 Inter-Agency Working Groups

Inter-Agency Working Groups will be required to deliver key tourism projects. The proposed flagship project – the Dublin Mountains Interpretation and Orientation Centre – is a case in point. A working group is proposed involving the Hellfire Club landowner Coillte, South Dublin County Council, the DMP and other stakeholders to jointly agree the task of planning and delivering the project. The Council could also establish working group arrangements with, inter alia, the OPW, ITT and Waterways Ireland. Various local authorities will also form part of these product development Working Groups.

5.3.4 Collaboration between Directorates in project/funding bids

Funding opportunities for tourism development can come from a wide variety of sources. To ensure the funding opportunities from the National Transport Authority Strategy, Heritage, Conservation, Sports Capital and other funds can be maximised, greater collaboration between directorates is essential. Project proposals to obtain funding could be more strategically beneficial if aligned with an economic and tourism focus, in addition to their current purposes.

5.4 Create a Tourism Database

Adoption of the Destination Dublin Plus tourism development strategy brings significant additional resource implications for the local authority and requires it to take the lead – at least in the short term. It is imperative, then, that the Council's investment choices in tourism product development and marketing realise – and are seen to realise – the maximum benefit and value for the County and the people of the County. It is essential that investment decisions are market-focused, prioritised based on capitalising on the market opportunities with the highest, sustained growth potential with such benefits spreading fully and substantially across the local economy.

These investments cannot be fully justified without justified projections formulated on a reliable and comprehensive database of tourism in the County. Such a data base should be expressed in terms of overall visitor levels and spending by source market and segment, with hotel and attraction/activity demand records, and the levels of businesses supported whole of part by tourism, and both direct and indirect employment from tourism.

It will be a high priority for the proposed County Promotion and Tourism Section:

1. To work closely with Fáilte Ireland to develop a database that provides the requisite measurements disaggregated to County level to support proposed investments,
2. To implement visitor counters and conduct visitor surveys at attractions and events, to establish visitor profile, characteristics, motivations and experiences, and assess and monitor the results, and
3. To establish regular surveys of the County's tourism operations, including an annual hotel survey covering guests, source markets, jobs and suppliers.

6 Recommended Goals and Strategies: Markets and Marketing

6.1 Detailed South Dublin Marketing Strategy and Plan

The development of a full tourism marketing strategy and detailed marketing plan for South Dublin is an essential short term action. The urgency reflects the twin needs of:

- Gaining maximum benefit from, and heightened capability to participate fully in, the campaigns of Grow Dublin, and
- Developing additional marketing and promotional activities to supplement and complement those of Grow Dublin targeted at primary opportunity market segments for South Dublin.

Unless South Dublin has a clear marketing strategic positioning and branding concept that will blend effectively and bring value added to the Grow Dublin campaign but, at the same time, will be distinctive from those of the other counties in the Dublin-wide initiative, it will not be able to participate as a strong partner with different features and strengths; and, further, it will fail to capitalise on market segments that are not central to the present Grow Dublin campaign but which represent significant opportunities for South Dublin.

The creation of a marketing strategy based on the proposition along the lines of “The Great Outdoors on Dublin’s Doorstep” and a strong but succinct branding copyline capable of driving a digital platform (such as “Dublin’s Doorstep – Do It – Discover It”) will be needed to establish South Dublin as a new, different and dynamic destination within the Dublin family. Equally important will be marketing propositions to articulate the USP of South

Dublin’s tourism product clusters and its corridors/trails/routes; and the selection of the marketing channels that reach the target market segments most effectively.

Among the marketing communications and promotional tools that should be considered for inclusion in the plan are:

- The establishment of on-the-ground visitor information points based on visitor footfall. The Dublin Mountain Park has been identified as one location for the provision of visitor information; another could be in Tallaght as the entry point into the County for many visitors. However, all operations and attractions catering for visitors should hold material on the County’s tourism attractions and activities, and provide website information; while a computerised kiosk or “pop up” information office might be operated at major events in the County,
- The creation of a full digital platform – interactive website with the different product streams on separate pages with links to product and service providers and supporting platforms which promote the proposition, events and festivals calendar, social media pages,
- Social media messaging is the new “word of mouth”. It is instant and effective, and needs to be fully embraced by a new destination like South Dublin which will attract principally first time visitors. It is vital that those that come to South Dublin have a fully satisfactory set of experiences and are encouraged to pass on positive feedback to those considering a future destination.
- Radio advertising in Ireland’s regions targeting the domestic tourist, especially at the time leading up to events and festivals,

- Collaterals still have an important role to play in tourism marketing, particularly for destinations building up from a low base.

6.2 Destination Dublin Strategic Plan to 2020

The Grow Dublin strategic plan represents a prime opportunity for South Dublin to establish its own identity as part of a suite of County destinations in the Dublin region, and to get the benefit of segment and activity campaigns developed through the Destination Dublin team. Close liaison between the County Promotion and Tourism Section and the Destination Dublin team will be maintained to ensure the County’s tourism achieves full benefit from the regional Dublin strategy.

South Dublin’s primary market segment opportunities do not fully coincide with the priority segments featured in the current planned Destination Dublin campaigns for the immediate future. It will therefore be essential for the County Promotion and Tourism Section to develop full strategic marketing campaigns for those segments perceived to represent the greatest potential based on the tourism product development strategic recommendations in this plan. These are:

Overseas

- Great Escapers
- Nature Lovers
- Culturally Curious
- Business
- Events and Festivals
- VFR

Domestic

- Connected Families
- Footloose Socialisers
- Indulgent Romantics
- Business
- Events and Festivals
- VFR

There is a strong opportunity for South Dublin to work closely with the Destination Dublin team in respect of the Culturally Curious, Business and events and Festivals segments of the overseas markets; and with Failte Ireland on the domestic segments identified as representing good opportunities for South Dublin. However, in respect of the Great Escapers and Nature Lovers segments of overseas markets, South Dublin will need to develop and implement its own clear and detailed strategic marketing plan, albeit consultation and assistance should be sought from the Destination Dublin team and Tourism Ireland.

6.3 Partnerships: Local, Regional, National, International

The tourism distribution system involves many different entities both in the source markets and in the destination. Public: private sector collaboration and coordination is of the essence, especially in respect of destination marketing. Destinations related to administrative areas cannot work in isolation of their neighbours since tourists do not recognise such boundaries, so a spirit of *coopetition* (competition with cooperation) is needed to ensure mutual benefits between adjacent destinations. All these factors are relevant to South Dublin as it seeks to build up its tourism sector from a low base.

Partnership and cooperative actions include:

- Liaison between the County Promotion and Tourism Section and local tourism businesses (through the proposed Tourism Industry Group and by individual contact, as appropriate):
 - to ensure marketing messages and materials are consistent with the destination proposition and brand, especially as local operators are important communicators to the travelling public,

- to ensure County materials and website links are included in the information materials provided to participants by the organisers of events in the County,
- to develop partners to host familiarisation visits for tour operators, travel agents and media,
- set up competitions with prizes of tourism experiences in the County, and other joint promotions,
- support to individual operators in developing their marketing content, including cross selling opportunities
- Partnerships with specialist agencies and interest groups of relevance to South Dublin's tourism product offering are important in achieving recognition and standing. Working with agencies such as sports and outdoor activity bodies to co-bid for events and conferences such as the Adventure Travel World Summit will serve to raise market awareness,
- Maximise cross-selling of the County's tourism products and services at a range of sites e.g. OPW, Civic facilities, RUA RED, LUAS, ITT, Business Parks,
- Partnerships with local, national and international media can be an effective way of raising awareness and influencing in a positive way perceptions of South Dublin. This can be achieved by feeding stories/themes to media contacts such as the connection between South Dublin's outdoor proposition and the Operation Transformation scheme's focus of health and wellbeing.

6.4 Heighten Awareness of South Dubliners of the County's Tourism Assets

Tourism takes place where other people live. The residents of a destination constitute a central part of the visitor's set of experiences – their attitude towards visitors is of the utmost significance, both in the general sense of making the visitor feel welcomed and comfortable in the destination, and as a source of information about places to visit and things to do in the area. South Dubliners share the open and friendly attitude towards visitors of all Dubliners. Where they are lacking is in their knowledge and ability to assist visitors in terms of advising them of South Dublin's attractions and activities available – not through any failing of their own, but because information about such things is not well publicised. A key goal, therefore, is to achieve an enhanced knowledge among local residents of the County's tourism assets.

It is recommended that a programme of awareness-building initiatives should be implemented by the new tourism Section in South Dublin County Council. This will include but not be limited to the following:

- Public meetings and presentations,
- Small group familiarisation tours to the main attractions in the County on a "Get to know your own County" theme,
- Features in the local media about South Dublin's tourism assets, and
- Presentations in schools and colleges and to community interest groups (including Volunteer Ambassadors etc.).

The circulation of information through local media of the Community Archaeology Project can help to heighten awareness of the Dublin Mountains' heritage among South Dubliners.

6.5 Creating Marketing Expertise

Ensuring local tourism product and service providers are fully versed in both the operations of the tourism distribution system and modern marketing methods, it is proposed that a series of marketing seminars/advice sessions could be operated by the County Promotion and Tourism Section in conjunction with Fáilte Ireland, LEO and ITT. This suggestion takes account of two factors:

1. The important role of local tourism product and service providers in marketing communications,
2. As tourism expands rapidly in South Dublin attracting new business start ups, many entrant entrepreneurs will not be fully versed in the tourism business and elements like digital marketing, and routes to markets and segments.

7 Recommended Goals and Strategies: Human Resource Development

7.1 Establish a Suite of Tourism Education and Training Programmes

In consequence of the ending of tourism training programmes through CERT and Fáilte Ireland, industry stakeholders report shortages of skilled personnel. In South Dublin their pressing short term needs are for skilled personnel in the following areas: chefs, bar staff and sales personnel. With the expansion of South Dublin's tourism sector, focussing on outdoor activities in the Dublin Mountains and on the waterways, there will be a requirement for personnel to be trained in:

- Guiding/Mountain Rangers,
- Activity tourism, and
- Health and Safety.

The establishment of a College of Tourism and Food at the IT in Tallaght can address these shortages and in so doing establish ITT as a major centre for tourism training.

The Momentum scheme whereby education and training is provided free of charge in tourism-related courses for the long-term unemployed , and the development of a tourism apprentices programme are further ways by which the tourism industry can recruit personnel with a basic grounding in necessary tourism and hospitality skills .

7.2 Undertake a Tourism Awareness Programme for Tourism Service Personnel

South Dublin does not have a long tradition of tourism. In consequence, most service personnel in tourism and related businesses do not a clear or detailed understanding of the economic contribution that tourism makes to a destination. Many are unaware of the range of assets and features in the County in which visitors may be interested to experience, so they are unable to either pass on informed guidance or to act as ambassadors for South Dublin.

To rectify this situation, the Tourism Section of the Council can organise a series of activities for front-line personnel in hotels and other tourism-related operations patronised by visitors: seminars on topics such as the socio-economic benefits of tourism, the County's tourist attractions, and how they be effective and gain job satisfaction from their role as Tourism Ambassadors.

8 Recommended Goals and Strategies: Funding

This tourism strategy sets out a programme of tourism product development interventions and marketing initiatives. The interventions proposed will require a combination of public sector and private sector funding, allied to community support. Larger projects and improvements to the County's tourism infrastructure will invariably be dependent on support from the public purse.

The forging of a strong enterprise culture in South Dublin will also be essential if the County is to realise its potential as a destination for activity tourism and capitalise on its competitive advantage for business tourism.

As part of its key role in facilitating tourism investment and enterprise support in the County, the County Promotion and Tourism Section in South Dublin County Council will develop and maintain a directory of tourism funding services and grant schemes.

The Directory will provide up-to-date information on the following funding programmes:

8.1 Tourism Capital Investment Programme

Fáilte Ireland is the National Tourism Development Authority. Its role is to guide and promote the development of tourism as a leading indigenous component of the economy. The Fáilte Ireland *Tourism Product Development Strategy (2007 – 2013)* created a framework and policy guidance for the long-term development of the tourism product in Ireland. The *Tourism Capital Investment Programme (TCIP 2007 – 2013)* was put in place to develop, upgrade, and enhance the tourism product.

There were three aspects to the 2007 – 2013 TCIP – Infrastructure, Attractions and Activities. The key objectives of the 2007 – 2013 TCIP included:

- Improving the range, quality and geographic spread of 'things to see and do' available to tourists in Ireland,
- Generating incremental tourism expenditure,
- Increasing direct employment in the product where the investment occurred, and also indirect employment in the host locality, and
- Generating construction and related jobs during the construction stage.

In summary, the main objective is to ensure that investment in tourism product development delivers maximum economic benefit.

The Tourism Capital Investment Programme is currently under review.

8.2 Conference Financial Support Scheme

Fáilte Ireland also provides support to hotels, venues and conference organisers. Through the Dublin Region Convention Bureau, opportunities exist for the South Dublin business tourism sector to avail of a range of supports including advice on attracting and hosting conference events, support for familiarisation trips or site inspections, event organisation, and support through international offices.

8.3 Festival and Events Scheme

Fáilte Ireland's *National Festivals and Events Programme* is a further grant scheme which is designed to support large scale festivals and events. Strict eligibility criteria apply with minimum thresholds set in respect of co-funding, and overnight stays generated by the event.

8.4 Community Tourism Diaspora Project

The Community Tourism Diaspora Project is a joint partnership between IPB Insurance, Fáilte Ireland and 31 local authorities. The scheme provides an annual fund of €1 million to support local community-based events and festivals each year. Applications for funding are now being sought.

8.5 Tax Schemes

Fáilte Ireland also administer a number of tax schemes to support the tourism industry. These include the Employment Investment Incentive Scheme, Hotel Capital Allowances, and Section 482: tax relief for owner occupiers of an approved property or garden. (In return for tax relief, the owner occupier must allow access to the public or use it as a tourist accommodation facility).

8.6 LEADER

In Budget 2015, the government announced that it had allocated €250 million towards the LEADER element of the Rural Development Programme. LEADER funding will be used to support sustainable economic development projects for rural communities ranging from tourism agri-food and other business activities. An allocation of €6.4 million has been made for rural Dublin. An expression of interest process will begin shortly.

8.7 South Dublin Local Enterprise Office (LEO)

The Local Enterprise Office of South Dublin County Council offers business finance support to small businesses for the costs involved in starting or growing a business. Supports range from priming and business development support, microfinance and loans, to grants for feasibility studies.

The LEO (Local Enterprise Office) working closely with the Chamber of Commerce, the ITT and the Councils County Promotion and Tourism Section can play a supportive role in the growth of the tourism economy;

- Provide Integrated online information for tourism and hospitality sector enterprises to facilitate access to supports from state agencies, including the maintenance of an up to date guide to supports on website

- Organisation of workshops/seminars to brief SMEs and community ventures on sources of enterprise support including funding opportunities from EU and national programmes and digital marketing and route to market skills programmes
- Pursue access to group training programmes funded by agencies such as Fáilte Ireland, Enterprise Ireland and or other national supports such as Momentum.
- Cooperate with ITT, South Dublin Chamber, alongside LEO in the identification of any specific gaps in the tourism chain that could be supported by the Council or collaboratively – apprenticeships, marketing initiatives, retail supports, enhancement of food offering.

The 1916 Commemoration National Fund is likely to focus on support for events, interpretation and heritage trails related to the 1916 Rising.



8.8 Ireland Strategic Investment Fund

The National Pensions Reserve Fund (NPRS) will become Ireland's Strategic Investment Fund. NPRS monies will become available for investment as suitable opportunities arise

8.9 Other Funding Sources

There are a range of other funding sources which are relevant and are likely to play an important role in facilitating the implementation of recommendations as set-out in this strategy. These include the *Sports Capital Programme*, *Cycleways and Related Access*, the *Structures at Risk* (restoration grant), and *Community Heritage Grant Scheme*, South Dublin County Council's *Villages Initiative*, and the *Tidy Towns Scheme*.

9 Visitor Targets and Economic Impact

In setting future growth rates targets for South Dublin it is pertinent to consider:

1. Predictions of future growth in tourism at the international, national and regional levels, with particular attention to the prognoses proposed for the Dublin area under the “game changer” scenario,
2. The very low starting base level of tourism in South Dublin whereby the application of tourism growth rates in line with those for the whole of Ireland or even for Dublin as a whole would produce a tourism sector of still modest scale even over a ten year time frame, but at the same time
3. Much of the recommended tourist product offering of South Dublin is not market ready, so cannot be widely promoted until major development, such as in respect of the Dublin Mountains Park, are completed.

The approach adopted in setting targets and assessing impacts has been to take an initial phase (i.e. years 1 to 3) while tourist product development is implemented, a rapid growth phase (years 4 to 7) when South Dublin achieves substantial lift off with strong marketing support for the newly developed range of attractions and activities, and a consolidated phase (years 8 to 10) when South Dublin, as an established destination within the greater Dublin area, achieves growth in line with the Dublin “game changer” scenario.

The growth rates set for the three phases are relatively modest but are considered to be realistic combined targets for overseas and domestic tourism. In the short term, it is unrealistic to anticipate growth of more than 5% a year. Once significant product developments are in place and active marketing undertaken, growth rates can be significantly higher, with the rates for nights and spend higher than for arrivals reflecting the fact that there will be more to do encouraging tourists to stay longer and spend more. As South Dublin becomes established as a significant and distinctive destination within the greater Dublin area, it should aim to match the overall “game changer” scenario rate of increase set by Destination Dublin strategic plan.

The resulting targets are detailed in Table 12 Visitor arrivals targets for the end of the ten year period are a quarter of a million, 1.2 million nights spent in South Dublin, and visitor spending in the County estimated at €60 and €65 million.

Using the accepted national formula that 1,000 additional tourists support 18 jobs, then total the target for employment in the tourism sector in South Dublin by the end of the decade will be approaching 5,000, double the present level.

Table 12 South Dublin Visitor Targets and Economic Impact Over a 10 Year Period

Period	Visits		Nights		Spend		Jobs
Present	120,000		504,000		€26 million		2,500
	+ % p.a	Value (‘000)	+ % p.a.	Value (‘000)	+ % p.a.	€ mn)	
Initial Phase (Years 1 to 3)	5	139	5	583	5	30	2,842
Rapid Growth Phase (years 4 to 7)	10	203	12.5	935	12.5	48	3,994
Consolidated Phase – Years (years 8 to 10)	7	250	8.6	1,197	8.6	62	4,840

Source: TDI calculations

Key indicators to measure performance could include:

- Economic value of tourism – spending by visitors,
- Employment in the sector - accommodation, food and events,
- Enterprise development – expansion and initiation of new businesses in the sector,
- Number of visitors – domestic and overseas, ideally by purpose of visit, and
- Market share performance - percentage share of tourism to Dublin Region.

Part 4 – Action Plan

The Action Program set out in this part of the report details a total of 55 actions.

Action Programs:

1. Organisation and Management
2. Tourism Product Development
3. Access and Infrastructure
4. Markets and Marketing
5. HRD/Training

The action plan tables in the following matrix are laid out as follows:

- The detail of the action.
- The rationale for taking the action.
- The agency(ies) sector(s) that will support the action or provide funding.
- The priority (in terms of time) placed on the action will:
 - Priority 1 – *Indicate a short term action in 2015*
 - Priority 2 – *Indicate a medium term action in 2016-2017*
 - Priority 3 – *Indicate a longer term action in 2018-2020*

Legend:

▪ SDCC	South Dublin County Council
▪ DLRCC	Dun Laoghaire Rathdown County Council
▪ DCC	Dublin City Council
▪ FCC	Fingal County Council
▪ KCC	Kildare County Council
▪ DMP	Dublin Mountains Partnership
▪ NRA	National Roads Authority
▪ TI	Tourism Ireland
▪ FI	Fáilte Ireland
▪ GFI	Good Food Ireland
▪ NTA	National Transport Authority
▪ SD Chamber	South Dublin Chamber of Commerce
▪ IFI	Inland Fisheries Ireland
▪ DIT	Dublin Institute of Technology
▪ TIG	South Dublin Tourism Industry Group
▪ OPW	Office of Public Works
▪ ISC	Irish Sports Council
▪ LEO	South Dublin Local Enterprise Office

1. Organisation and Management

Action	Rationale	Lead Agency	Support Agency/ies	Priority
1 Establish dedicated <i>County Promotion and Tourism Section</i> in SDCC	Lead and coordinate tourism development and marketing.	SDCC	SD Chamber/FI/ Private Sector	1
2 Establish South Dublin Tourism Industry Group	Facilitate tourism industry representation and engagement.	SD Chamber	SDCC/Private Sector	1
3 Establish strategic partnerships <ul style="list-style-type: none"> Local Authorities working groups Inter-agency working groups Inter-departmental collaboration in SDCC 	Collaborative approach required to deliver strategic objectives.	SDCC	DLRCC/FCC/DCC/OPW/ Coillte/ ISC/NRA	2
4 Create tourism database	Inform investment decisions.	SDCC	SD Chamber/FI	2

2. Tourism Product Development

2.1 Dublin Mountains Park – Flagship Project

Action	Rationale	Lead Agency	Support Agency/ies	Priority
1 Set-up Dublin Mountains Park Working Group.	Multi-agency approach required to deliver project.	SDCC/Coillte	DLRCC/DMP/ FI	1
2 Prepare Dublin Mountains Park Master Plan	Further develop the overall concept for the Dublin Mountains Park (i.e. Boundaries, access, primary features, activities, community role etc.)	SDCC	DLRCC/Coillte/ FI/ DMP	1
3 Prepare Dublin Mountains Orientation Centre Development Plan	Identify optimum site access considerations, optimum facility mix, concept design and development guidelines, management structure and operational guidelines.	SDCC/Coillte	DLRCC/DMP/FI	1
4 Prepare Outdoor Pursuits Investor Prospectus	Information to attract private sector investment and/or operators (e.g. planning guidelines, grants and other supports etc.).	SDCC	SD Chamber of Commerce	2
5 Dublin Mountains Experience Enhancement <ul style="list-style-type: none"> Access to/within mountains Develop routes and trails Develop viewing points/interpretation 	Enhance awareness of Dublin Mountains and improve visitor experience.	DMP	Coillte SDCC/DLRCC	2

2.2 Liffey Valley Cluster

	Action	Rationale	Lead Agency	Support Agency/ies	Priority
1	Set-up <i>Arthur's Way</i> Working Group	Multi-agency approach required to deliver project.	SDCC/KCC/ DCC/FCC		1
2	Develop <i>Liffey Villages</i> proposition and branding	Key component of Liffey Valley Cluster. Focus on public realm enhancement and encouragement of 'good food/culinary providers'.	SDCC/GFI	KCC/DCC/FCC/FI	2
3	Scope and develop the <i>Liffey Greenway</i> – Establish working group	Re-position and diversify Dublin's tourism product offer.	SDCC	DCC/FCC/KCC/OPW /NTA/FI	3
4	Expand and upgrade Canoeing and kayaking facilities at Lucan Demesne	Enhancement of activity facilities in line with overall objectives.	SDCC	Activity Providers	2
5	Scope and develop <i>Liffey Blueway</i> concept as a short to medium term measure	Develop market awareness of the river Liffey.	SDCC	Activity Providers	1

2.3 Rathfarnham/Marlay Park

	Action	Rationale	Lead Agency	Support Agency/ies	Priority
1	Rathfarnham Castle restoration	Enhance access to Castle and improve visitor facilities.	OPW	SDCC	1
2	Dodder Greenway implementation	Delivery of cycling and walking linear routes.	NTA	SDCC/DCC	1-2
3	<ul style="list-style-type: none"> Rathfarnham village enhancement programme (e.g. Looped trails) 	Enhance appearance and appeal of village.	SDCC	NTA/Businesses	2
4	St Enda's – Raise awareness <ul style="list-style-type: none"> Participation in commemorative events Collaborative 	Fully capitalise on unique visitor attraction.	OPW	SDCC	2

2.4 Tallaght – Sports and Activity Cluster

	Action	Rationale	Lead Agency	Support Agency/ies	Priority
1	Construction of New Stand in Tallaght Stadium	Expand capacity of venue to 10,000.	SDCC	ISC	1
2	Develop multi-use indoor facility	Enhance sports facilities/ strengthen cluster.	SDCC	ISC	2
3	Outdoor activities and services – Awareness programme	Service the needs of outdoor activity participants. Private enterprise/employment opportunities.	SDCC	Private Sector/ISC	
4	Develop <i>Tallaght Heritage Trail</i>	Develop complementary tourism product/ 'showcase' rich monastic heritage.	SDCC		3
5	Set-up Visitor Information Point in Tallaght	Provide information for visitors/ raise awareness of tourism assets and attractions.	SDCC		3

2.5 Grand Canal Corridor

Action	Rationale	Lead Agency	Support Agency/ies	Priority
1 Implement Clondalkin Round Tower Project	Capitalise on key historic asset/ Create new visitor experience.	SDCC	OPW	1
2 Grand Canal Greenway	Multi-use linear park.	Waterways Ireland	SDCC/KCC	2
3 <i>Aras Chronain</i> – Programme of traditional music, song and dance.	Develop authentic 'tourist experience' / Extend 'dwell time'.	Aras Chronain	SDCC/Comhaltas/ FI	3

2.6 Dodder Greenway Corridor

Action		Rationale	Lead Agency	Support Agency/ies	Priority
1	Implementation of Dodder Greenway Plan	Creation of environmentally friendly tourism product/ reinforce tourism positioning of South Dublin as a destination for outdoor activities.	SDCC/NRA	DCC/DLRCC	1
2	Encourage and Support the establishment of cycle hire facilities and services. Start at Tallaght and Rathfarnham	Facilitate usage of Greenway by casual/occasional cyclists.	SDCC	Private Sector/ISC	1
3	Develop Dodder as a destination for visiting anglers. Priorities include improvements to fish passages and access points	Capitalise on excellent angling potential.	IFI	SDCC	3
4	Develop Dodder Trail Themes (i.e. Dodder Nature Trail, Dodder Food Trail)	Attract/Cater for different market segments.	SDCC	DCC/IFI	2

2.7 Slade Valley Corridor

	Action	Rationale	Lead Agency	Support Agency/ies	Priority
1	Determine the route of the proposed <i>Slade Valley Heritage Trail</i>	Capitalise on cultural heritage and environmental resource/ enhance linkages between communities of Saggart, Rathcoole and Brittas villages.	SDCC	Land Owners	1
2	Develop walking and cycling trail (Rathcoole – Avoca – Saggart – Slade Valley – Brittas)	Enhance tourism potential of area.	SDCC	Land Owners/ISC	2
3	Investigate additional loops to main trail	Create linkages and critical mass of trail options.	SDCC	Land Owners/ISC	3

2.8 Supporting Initiatives

	Action	Rationale	Lead Agency	Support Agency/ies	Priority
1	MICE and Business Tourism – Strengthen communications and promote awareness of activities and attractions	Support business tourism sector/extend visitor 'dwell time'.	SDCC/SD Chamber	FI	1
2	'Best Village' Competition	Encourage civic pride initiative and business and business owner investment in premises.	SDCC	FI	1
3	Themed Trail Development <ul style="list-style-type: none"> Great views of Dublin Driving Circuit Monastic/Three Towers Trail Industrial heritage 	Coordinated approach to presentation of South Dublin's heritage and history.	SDCC	NRA/DLRCC/DCC/FI	2-3
4	Shackleton Mill restoration and visitor attraction development	Enhance tourist product offer in Liffey Valley.	FCC	SDCC	3
5	Establish <i>South Dublin Marque Membership Scheme</i>	Enhance quality of culinary provision.	SDCC	Bord Bia/GFI/FI/LEO/SD Chamber	2
6	Identify zones/locations for alternative accommodation	To diversify the range of accommodation offer in the County.	SDCC	Private Sector	2

3. Access & Infrastructure

Action	Rationale	Lead Agency	Support Agency/ies	Priority
1 Dublin Mountains Experience Enhancement <ul style="list-style-type: none"> Access to/within mountains Develop routes and trails Develop viewing points/interpretation 	Enhance awareness of Dublin mountains and improve visitor experience.	SDCC/DLRCC DMP	Coillte/FI	2
2 Rathfarnham Access Improvement	Enhance access from village to Castle.	SDCC	OPW	1
3 Develop looped walks (Rathfarnham Village – Castle – St Enda's – Dodder – Bushy Park)	Enhance linkages and improve visitor experience.	SDCC	DCC/OPW	2
4 Establish Dodder Greenway Access Points at: <ul style="list-style-type: none"> Rathfarnham Bushy Park Balrothery Weir at Firhouse Red Bridge Old Mill 	Provide access to Greenway.	SDCC	NRA/DCC/OPW	1
5 Provide <i>Signage Boards</i> at access points on Dodder Greenway. Boards would indicate features of interest for visitors.	Information provision for tourists and residents.	SDCC	NRA/DCC	2
6 Provide <i>Sheltered Stops</i> on Dodder Greenway.	Enhance quality of user experience.	SDCC	NRA/DCC	2
7 Introduce ' <i>Dublin Mountains Shuttle</i> '	Improve access.	DMP	SDCC/DLRCC/SD Chamber/ Private Sector	2
8 Introduce standardised orientation and tourist signage	Assist independent travellers.	NRA	SDCC	2
9 Remove ' <i>Welcome to South Dublin</i> ' signs on major access routes. Replace with ' <i>Welcome to Dublin</i> '.	Inconsistent with new 'One Dublin' approach to tourism.	SDCC	DCC/FCC/DLRCC	1

4. Markets and Marketing

Action	Rationale	Lead Agency	Support Agency/ies	Priority
1 Create Marketing Strategy – 'Great Outdoors on Dublin's Doorstep'	Establish South Dublin as a 'different, dynamic destination' within greater Dublin area.	SDCC/TIG	FI/TI	1
2 Establish Digital Marketing Capability in SDCC	Essential communications tools.	SDCC	DIT/FI	1
3 Grow Dublin Participation On-going liaison with Destination Dublin team in FI	Ensure South Dublin achieves full benefit from Dublin Regional Strategy.	SDCC/TIG	FI/FCC/DCC/DLRCC	1
4 Co-operative marketing actions	Collaborative approach required to maximise potential/ensure consistent marketing message.	SDCC/TIG	Private Sector/FI	2/3

5. HRD/Training

Action	Rationale	Lead Agency	Support Agency/ies	Priority
1 Establish College of Tourism and Food at DIT (Tallaght IT)	Opportunity – Address gap left by demise of CERT.	DIT	SDCC/SD Chamber	1
2 Establish Tourism Education and Training Programmes in: <ul style="list-style-type: none"> Guiding/Mountain Rangers Food and Catering Sales Activity Tourism Health & Safety 	Address current shortage of skilled personnel/plan for future needs.	DIT	SD Chamber	2
3 Undertake Tourism Awareness Programme	Promote understanding of tourism and economic development opportunities.	SDCC	DIT/SD Chamber	3