

Dublin REGIONAL

TOURISM DEVELOPMENT
STRATEGY 2023 – 2027

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EXECUTIVE SUMMARY



EXECUTIVE SUMMARY

The Dublin Regional Tourism Development Strategy 2023–27 is a roadmap for the tourism industry and all stakeholders involved in tourism in the region to navigate the current challenges and steer a course towards a sustainable recovery and continued success. The plan sets out a strategic approach to unlocking the commercial potential of Dublin. It will ensure focus on tourism development is sustainable and regenerative and that the benefits accrue to local communities and to nature.

The strategy has been prepared during a time of unprecedented uncertainty. Despite having weathered the disruption caused by Brexit and COVID-19, the industry is now facing into an energy crisis of unprecedented scale resulting in further uncertainty.

One of the most important parts of this strategy will be to support our tourism providers with the skills they need to navigate an uncertain operational environment and to be prepared to seize the opportunity when it presents itself.

In recognising the challenges facing the industry in terms of labour shortages and rising input costs, we will deliver supports in a number of ways. These include Account Management, Network and Cluster Development and the implementation of National Support Programmes.

The **Regional Tourism Development Strategy 2023–2027** is primarily informed by the Government's Tourism Strategy **People, Place and Policy: Growing Tourism to 2025**, the Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media **Statement of Strategy 2021–2023**, Fáilte Ireland's **Strategy to 2023 – From Survival to Recovery** and the report of the Sustainable Tourism Working Group **Actions to Promote Sustainable Tourism Practices 2021–2023**. The Strategy is also informed by planning policy (the National Planning Framework, the Regional Spatial and Economic Strategies and lower tier plans).

THE CONTEXT

Dublin is the key access point for the island of Ireland and is often the first and/or last experience visitors have of the country. Its traditionally strong air access has also made it the key city break destination in Ireland. For many overseas consumers, it is their only experience of Ireland. This strong access, combined with good conference facilities, has also seen Dublin enjoy sustained growth in the

high value Meetings, Incentive, Conference and Events (MICE) business. Equally, the city's sporting and events infrastructure enables it to attract many domestic visitors. The tourism economy and associated visitor numbers for Dublin were impressive prior to COVID-19. Nationally, Dublin accounts for over two thirds of all overseas tourists to Ireland. Tourism revenue pre pandemic was €2.6bn, 85% of this revenue coming from overseas tourists. Tourism is also important in terms of employment, with the industry supporting just under 70,000 jobs in 2019.

Accommodation forms a strategically important element of the tourism sector but is also a limiting factor in tourism development – without it destinations cannot grow the length of stay that grows the visitor economy in a way that optimises benefits for local communities in terms of spend and job creation. We will continue to influence and shape accommodation development in the longer term, including a study on the economic & social contribution of tourist accommodation in Dublin to ensure that product is fit for purpose, future-proofed and there is a healthy pipeline of new capacity.

OUR AMBITION

Our ambition for this strategy is to drive recovery and growth of the visitor economy in Dublin to create sustainable, high-quality jobs in the sector to support and strengthen local communities, while protecting our natural environment and heritage. This will be achieved by driving spend from existing core market segments by increasing dwell time and the range of activities visitors engage in, cultivating new segments by maximising the outdoor offering. The aim is to drive penetration (increasing the number of things visitors do on their trips) and increase length of stay, thus focusing on value over volume. In doing so, we will redefine tourism success based on our sustainability goals.

Considering the restrictions in place in Q1, 2022 has been a strong year across the region aided by pent-up demand and deferred bookings from the previous two years. 2023 and beyond are expected to be challenging yet more predictable in terms of booking patterns. Forecasting the rate and pace of recovery and growth is difficult but at a minimum we expect a return to 2019 levels of revenue by 2026, in inflation adjusted terms, with an ambition to exceed this.

We also expect an additional 5% supply side

capacity (accommodation, visitor attractions, activity providers, etc.) to come on stream over the period of this strategy, which would be achieved through optimising existing assets (e.g., longer opening hours) as well as developing new stock.

It is Fáilte Ireland's long-term objective to ensure a greater regional spread of the socio-economic benefits of tourism across the country. For Dublin, this means a greater focus on the development of tourism along the coast and in the mountains, while optimizing and enhancing the tourism offering in the city centre, ensuring exceptional visitor experiences are at the core for domestic and international visitors while staying within existing infrastructural and environmental capacities. While the short-term focus is on recovery in all areas, as the recovery progresses, we will set more specific regional targets which will be considered at the mid-term review of this Regional Tourism Development Strategy informed by the Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media, Tourism Ireland's and Fáilte Ireland's new statements of strategy which are due to be delivered in 2023/24.

THE 10-YEAR VISION

It's 2033 and Dublin ranks in the top 3 of its competitive set* with tourists choosing to visit because of its uniqueness as a vibrant city centre nestled between mountains and a UNESCO bay, and because it's a recognised global leader for sustainable business events. Both domestic and international tourists are staying longer and doing more, enjoying experiences that surprise and delight, from distinct "urban villages" across the city, each with a unique experience to offer, to an easily accessible mountain offering overlooking the city-scape, and a bay peppered with characterful coastal villages, built heritage and water adventures. There is lots to see and do, both day and night, with iconic attractions, best in class experiences, world class food, live music and events, internationally renowned festivals and unrivalled nightlife. Locals are at the heart of the authentic visitor experience, as they share their stories and their city in an engaging and inherently Dublin way. Visitors can navigate their way seamlessly across the region using ticket-less public transport and way-finding that is accessible in their own language.

THE CHALLENGE

Dublin is made up of distinct geographies across the region – the bustling city centre nestled between the mountains and a UNESCO bay, each at differing stages of tourism development. Dublin needs to grow its appeal to new markets, including key domestic segments, while also continuing to develop and enhance experiences that will encourage visitors to do more while they are here. Our key challenge is to continue to evolve and activate a relevant and motivating city destination that will attract both high-yield international and domestic visitors by effectively mobilising and aligning stakeholders behind a singular coherent vision and visitor experience offering that extends stay all year round.

DISTINCTIVE DESTINATIONS



Source: Fáilte Ireland.

*Amsterdam, Belfast, Berlin, Copenhagen, Edinburgh, Prague.

STRATEGIC APPROACH

The Dublin Regional Tourism Development Strategy will achieve a new vision for tourism in the region by focusing on the following strategic objectives:

STRATEGIC OBJECTIVE 1:

Increase destination resilience by optimising visitor mix and maximizing revenue by increasing dwell time and range of activities engaged in.

STRATEGIC OBJECTIVE 2:

Re-ignite business tourism, positioning Dublin as a leader internationally, with a focus on sustainability.

STRATEGIC OBJECTIVE 3:

Develop differentiating experiences, providing domestic and international tourists with reasons to visit and to stay longer.

STRATEGIC OBJECTIVE 4:

Build a committed stakeholder and industry partnership to develop Destination Dublin, encompassing the whole region and leveraging citizen-centric and visitor-centric initiatives for mutual benefit, while reducing the industry's carbon footprint and ensuring net contribution to the protection of our cultural and natural heritage.

The following paragraphs outline how we will work collectively to achieve the opportunity presented by tackling the challenges that face the sustainable development of the region.

SUSTAINABILITY, CLIMATE ACTION AND BIODIVERSITY

The principles of sustainable tourism have been placed at the heart of this Regional Tourism Development Strategy through the adoption of the VICE model. Sustainability in tourism demands rethinking tourism success and mainstreaming sustainable tourism policies and practices.

Decarbonising the tourism sector is a key priority of this strategy. Fáilte Ireland is committed to working towards ensuring that the tourism sector plays its part to help deliver Ireland's commitments under the Paris Agreement on Climate Change and under Ireland's 2021 Climate Action Plan. Fáilte Ireland will adhere to these plans during the lifetime of this strategy.

For Dublin, a key sustainability challenge will be to facilitate the growth of tourism revenue while keeping within environmental capacities and ensuring tourism activities do not impact negatively on sensitive environments, habitats and species, or on local communities. The views of the local community should always be listened to, and they must be at the centre of any decision-making affecting the place where they live.

VISITOR STRATEGY

Our visitor strategy will be guided by a new Domestic Motivations Framework model and a clear understanding of consumer motivations for travel through continuous visitor research. Similarly, we will be guided by the existing global segmentation model and any further iterations of it over the coming years. This will provide new opportunities for differentiated approaches in the marketing and promotion of Dublin.

Dublin has traditionally been very dependent on international visitors, and typically these visitors either come for a city break or stay in Dublin as a "top or tail" to a longer trip to Ireland. Research tells us that many visitors including domestic, and indeed locals, are unaware of the full breadth of the Dublin offering.

Fáilte Ireland is also cognisant that the emergence of remote and hybrid working, and widespread adoption of video conferencing platforms may result in a permanent reduction in the level of transient international business travel into Dublin with negative impacts on hotels and restaurants. This scenario will need to be tracked and new sources of promotable business tourism or domestic and international leisure tourism may need to be developed to cover any loss of business that emerges.

The objective of the visitor strategy from a domestic perspective is to create awareness of the range of the city's offering to drive incremental revenue and longer stays from unconstrained adults, with a particular focus on Northern Ireland.

There is also an opportunity to tap into the “locals” or close counties market by encouraging people within proximity of the city to come and explore what the capital has to offer. Whilst unconstrained adults will remain the bullseye target market, there is an opportunity to attract new segments such as families and day-trippers, which will be essential to delivering revenue in the short to medium term.

In terms of international visitation, Dublin is focused on two key consumer segments, the Culturally Curious and Social Energisers. Both are sizeable segments but have differing needs and will be reached in different ways. For international visitors, the strategy is to retain existing markets and diversify into new high yield markets/segments with a key objective to drive consideration and booking of longer stays.

The Tourism Ireland COVID-19 research tracker in June 2021 indicated that a mix of outdoors/ rural and city breaks is the most popular type of break indicating that visitors want the best of both worlds. The focus will be on positioning Dublin as a must-do city break with a difference, with new propositions like the Dublin Coastal Trail substantiating that position and appealing to new segments, such as those seeking to be active in nature during the day, whilst having access to a vibrant city nighttime offering.

There will also be a focus on higher yield international segments such as luxury, golf and business tourism. Business tourism is a core market opportunity for Dublin. Given the higher value of a business delegate compared to a leisure tourist, this segment will play an important role in delivering revenue in the short to medium term.

DESTINATION DEVELOPMENT

Over the course of this strategy, in addition to activation of the Dublin Coastal Trail and the ongoing implementation of the Docklands Destination and Experience Development Plan (DEDP), we will develop two new DEDPs:

DUBLIN CITY DEDP
COMMENCING 2022
MOUNTAINS DEDP
COMMENCING 2023

The purpose of the DEDPs is to co-ordinate all tourism development activity in a destination around a single five-year vision which is prepared and owned by both public and private sector stakeholders. This Regional Tourism Development Strategy provides the overall strategic framework for each of the DEDPs in the region. DEDPs will also be subject to environmental assessment, as relevant.

PRODUCT DEVELOPMENT

Dublin is home to world class visitor attractions and experiences, both free and fee paying. The range of things to see and do is varied. It caters for lots of tastes and interests, from iconic, world-renowned attractions and festivals that motivate visitors to choose Dublin, to smaller “hidden gems” and unexpected attractions and experiences. Smaller activity providers, who by their nature tend to be more seasonal operations and are usually located closer to the mountains and the bay, are also available. Dublin is also known for its cultural and literary heritage and many of the national cultural institutions are located in the city.

Given that there are currently distinct areas within the region (city, coast and mountains), each at different stages of destination maturity, the product development strategy for each area will be unique to the specific requirement, with a focus on enhancing iconic and hero offerings in the city centre to optimise visitor experience, whilst targeting investment and business supports into the coast and mountains to augment the product offering, differentiating the overall city proposition.

COLLABORATION

The key to the success of this strategy will be how well each of the various partners collaborate in delivering on its objectives. These partners include the tourism industry, local authorities, State Agencies, the private sector and community groups. Parts of the implementation of this strategy will require close collaboration with the Ireland's Ancient East regional team, particularly for the Dublin mountains.

INDUSTRY CAPACITY & CAPABILITY

As we navigate our way through recovery and return to growth, harnessing the idea of Destination Dublin as a shared vision and positioning for the entire city offering will be key. There is a requirement for collaboration at a destination level across the city and county to deliver on the agreed outputs of the consolidated plan for Dublin.

We must ensure our tourism industry partners are primed to deliver these outputs with the requisite supports in place to make this happen. We must also continue to ensure that the visitor experience is consistently excellent, by particularly focusing on business mix, channel mix and demand/revenue generation.

Recognising the challenges facing the industry, we will deliver supports in several ways that include labour shortages, Account Management and a range of National Support Programmes. In particular, we will assist the industry in meeting its carbon reduction targets set out in the carbon budget.

COMMUNITY

Local communities are at the heart of any successful visitor destination so this strategy will ensure that tourism works to benefit local communities across Dublin. We will continue to build on the goodwill towards tourism within local communities in the region by ensuring they are involved in all decisions that could impact them.

We will engage with local communities in relevant interpretation projects that involve their local heritage and culture, in association with other relevant agencies and bodies. It will create opportunities for local communities to present and share their own culture, traditions and heritage with visitors to their area.

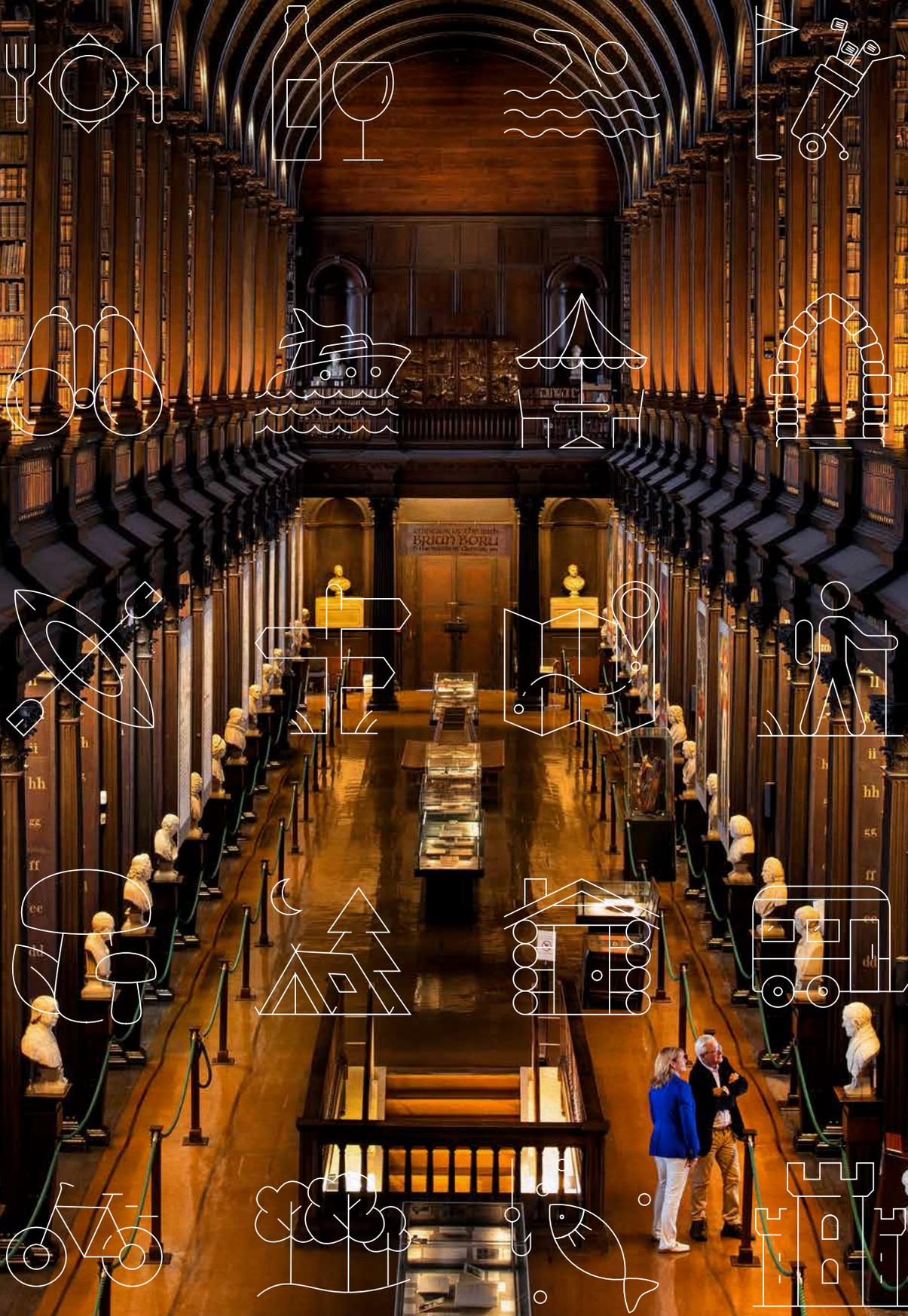
ENVIRONMENTAL PROTECTION & PROMOTION

The protection, enhancement and promotion of our most important tourism asset, the natural environment, has been integral in the creation of this strategy.

The potential impacts on the environment that could arise from implementing this Regional Tourism Development Strategy have been fully assessed through a Strategic Environment Assessment.

An environmental monitoring programme has been established to monitor any impacts that might arise over the course of the strategy period.

It is imperative to ensure the conservation and maintenance of key elements of biodiversity as part of any development projects do not contribute to biodiversity losses or deterioration. Integrating the requirements for environmental protection and management form a core part of this approach.



Visitors in awe of the majesty of the Long Room at Trinity College.

1. INTRODUCTION AND CONTEXT – ABOUT THIS STRATEGY



LOUTH

MEATH

Balbriggan

Skerries

Lusk

Rush

Donabate

Swords

Malahide

Blanchardstown

Howth

Lucan

DUBLIN

Clondalkin

Tallaght

Dundrum

Blackrock

Dún Laoghaire

KILDARE

WICKLOW

1.1. REGIONAL TOURISM DEVELOPMENT STRATEGY OVERVIEW

The Regional Tourism Development Strategy (RTDS) represents a 10-year vision for the sustainable development of tourism in Dublin, together with a 5-year strategy to guide the achievement of that vision. It identifies the elements required at a strategic level to unlock the commercial potential of Dublin, while exceeding the expectations of our visitors, protecting the environment and enhancing the lives of local communities.

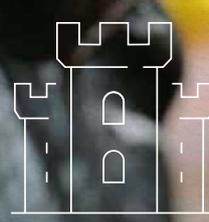
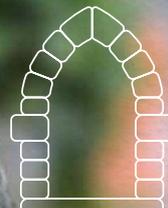
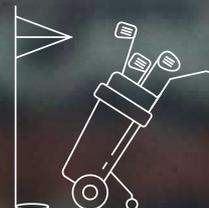
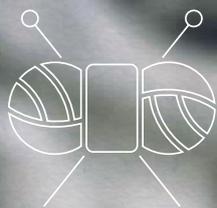
It provides a guiding strategic framework for other more detailed tourism development plans, which will be prepared over the next five years. These include Destination and Experience Development Plans (DEDPs), the tourism sections of City and County Development Plans and other sources of public funding, such as URDF and RRDF.

Dublin is comprised of several distinctive destinations (city, coast and mountains), each at varying levels of maturity in terms of their tourism development. Central to this strategy is a new approach to destination development recognising the issues, challenges and opportunities facing a destination are directly linked to its level of maturity. This requires destination development plans to be nuanced to reflect the needs and growth opportunities in each destination. It will ensure the right type of interventions and supports for the destination are triggered and future development is sustainable and relevant for the destination.

Developing destinations is complex and multi-faceted. It involves a myriad of different stakeholders and a wide range of touchpoints that impact on the quality of the visitor experience. Among the many elements of a great destination include the core motivators from visitor attractions, activities, accommodation base, to visitor facilities and services. The destination experience is further enhanced by the quality of its physical and digital infrastructure, and the accessibility of its landscapes and streetscapes. Attractive destinations for visitors are first and foremost high-quality environments and great places to live and work for citizens.

It is the combination of these building blocks which will shape the overall destination offering. These are in turn sustained by the actions of many bodies addressing the needs of both citizens and visitors. A strong partnership approach among all stakeholders centred around a clear, shared vision is key to creating strong sustainable destinations. This works when local authorities, community groups, tourism industry members, representative groups, cultural institutions, and State Agencies come together around this shared vision, working together to deliver a sustainable destination that works for visitors and citizens alike.

Fáilte Ireland consulted widely with industry and stakeholders in preparing this regional tourism strategy. As part of the process, over 200 industry partners from across the region responded to a survey to help identify the key challenges facing the sustainable development of tourism in Dublin over the coming years. This strategy has also taken into account the findings of the Strategic Environmental Assessment (SEA) which are detailed in the accompanying SEA Environmental Report.



Statue of James Joyce, North Earl Street, Dublin City Centre.

1.2. DUBLIN REGION AND SUCCESS TO DATE

Dublin is the key access point for the island of Ireland and is often the first and/or last experience visitors have of the country. Its traditionally strong air access has also made it the key city break destination in Ireland. For many overseas consumers, it is their only experience of Ireland.

This strong access, combined with good conference facilities, has also seen Dublin enjoy sustained growth in the high value Meetings, Incentive, Conference and Events (MICE) business. Equally, the city's sporting and events infrastructure enables it to attract many domestic visitors.

The tourism economy and associated visitor numbers for Dublin were impressive prior to COVID-19. Nationally, Dublin accounts for over two thirds of all overseas tourists to Ireland. Tourism revenue pre pandemic was €2.6bn, 85% of this coming from international tourists. Tourism is also important in terms of employment, with the industry supporting just under 70,000 jobs in 2019.

MEATH



KILDARE



WICKLOW



VALUE AND SHARE OF TOURISM

€2.6bn

VALUE OF TOURISM IN DUBLIN

85%

PERCENTAGE OF REVENUE GENERATED
BY OVERSEAS TOURISTS

15%

PERCENTAGE OF REVENUE GENERATED
BY ISLAND OF ISLAND TOURISTS

70,000

TOURISM JOBS SUPPORTED



1.3. STRATEGIC CONTEXT

The Dublin Regional Tourism Development Strategy 2023–2027 provides a roadmap for industry and all stakeholders involved in tourism, to navigate the current challenges and opportunities to steer a course towards recovery and continued success.

It is guided in this regard by a number of important strategies, primarily the government's tourism strategy *People, Place and Policy: Growing Tourism to 2025*, the Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media *Statement of Strategy 2021–2023* and Fáilte Ireland's "*Strategy to 2023 - From Survival to Recovery*", and the report of the Sustainable Tourism Working Group *Actions to Promote Sustainable Tourism Practices 2021–2023*.

The strategy is also informed by planning policy (the National Planning Framework, the Regional Spatial and Economic Strategies and lower tier plans). It is also anticipated that during the life of

this strategy, forthcoming national policies and/or strategies, specifically those which reflect a need for responsiveness and evolving climate change legislation may impact aspects of the Regional Tourism Development Strategy. These include the development and publication of a new Government Tourism Policy which mainstreams sustainability and aligns with the 2021 Climate Action Plan, Tourism Ireland's forthcoming (2023) Corporate Strategy and Fáilte Ireland's own Corporate Strategy which expires at the end of 2023. The Dublin RTDS will review and respond appropriately to these policies and strategies on an ongoing basis.

Fáilte Ireland's current Corporate Strategy seeks to guide the industry back to recovery following the COVID-19 global pandemic. It sets out a course of action based on the following eight strategic pillars, from which this Regional Tourism Development Strategy takes its cue:

1.	To sustain tourism businesses in the short term so they can thrive over the long term.	<i>Survive to Thrive.</i>
2.	To support industry to attract and retain talent to support sustainable growth.	<i>Supporting Tourism Careers.</i>
3.	To achieve a sustained step change in Irish stay-cations.	<i>Accelerate Domestic Tourism.</i>
4.	To transform Ireland's outdoor tourism experience.	<i>Opening the Outdoors.</i>
5.	To transform Irish tourism's online presence and e-commerce capability.	<i>Digital that Delivers.</i>
6.	To enhance the destination experience and support the industry in building a pipeline of future international business.	<i>Destination Development and Distribution.</i>
7.	To reduce the carbon footprint of the tourism sector and make it much more sustainable.	<i>Driving Climate Action.</i>
8.	To ensure our delivery is best in class.	<i>Delivering Excellence.</i>

The strategy that follows for Dublin serves to deliver on each of the above eight strategic pillars.

1.4. REGIONAL RECOVERY AND GROWTH FORECAST

Forecasting is very difficult in the current economic environment, particularly in the midst of rapidly rising energy costs. While we have made the following recovery and growth forecast for Dublin using the best available data to hand, we will ensure that we keep these predictions under periodic review and update them regularly.

The pandemic resulted in a renewed focus on the opportunity presented by the domestic market. Moving forward the ambition is that domestic city breaks (with a particular focus on Northern Ireland) will continue to provide growth & frequency opportunities, particularly during off peak periods. While maximising the domestic opportunity over the next few years is vital to rebuild the sector, the importance of the international market cannot be overstated.

Given Ireland (and indeed Dublin's) high reliance on overseas tourists for earning, real recovery to pre-pandemic levels will only be possible when international tourism returns. The overseas market is likely to recover more slowly as connectivity returns: 2022 levels of business are likely to be approximately 60% of 2019 nationally but it includes business carried over from 2020 and 2021, so recovery is likely to slow in 2023 and our best estimate is that demand will be back to 2019 levels by 2026. In the early days of international travel re-opening, overseas tourists are more likely to return to the traditional destinations in Ireland first – including Dublin – before exploring the lesser-known areas. Dublin is uniquely placed to maximise the opportunities post pandemic, as a vibrant capital nestled between the sea and mountains, offering a city break with a difference.

OUR AMBITION

Our ambition for this strategy is to drive recovery and growth of the visitor economy in Dublin to create sustainable, high-quality jobs in the sector to support and strengthen local communities, while protecting our natural environment. This will be achieved by driving spend from existing core market segments and maximising the outdoor offering to cultivate new segments.

The aim is to drive penetration (increasing the number of things visitors do on their trips) and increase length of stay. In doing so, we will redefine tourism success based on our sustainability goals.

Considering the restrictions in place in Q1, 2022 has been a strong year across the region aided by pent-up demand and deferred bookings from the previous two years, 2023 and beyond are expected to be challenging yet more predictable in terms of booking patterns. Forecasting the rate and pace of recovery and growth is difficult but at a minimum we expect a return to 2019 levels of revenue by 2026, in inflation adjusted terms, with an ambition to exceed this.

We also expect an additional 5% supply side capacity (accommodation, visitor attractions, activity providers, etc.) to come on stream over the period of this strategy, which would be achieved through optimising existing assets (e.g., longer opening hours) as well as developing new stock.

REGIONALITY

It is Fáilte Ireland's long-term objective to ensure a greater regional spread of the socio-economic benefits of tourism across the country. For Dublin, this means we will have a distinct focus on the city, coast and mountains while staying within existing infrastructural and environmental capacities. While the short-term focus is on recovery in all areas, as the recovery progresses, we will set more specific regional targets which will be considered at the mid-term review of this regional tourism strategy, informed by the Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media, Tourism Ireland's and Fáilte Ireland's new statements of strategy which are due to be delivered in 2023/24.

SEASONALITY

Over the medium to long term, we will look to step change Dublin's offering and positioning to ensure that it is an attractive year-round destination for sustainable tourism experiences for both domestic and international visitors.

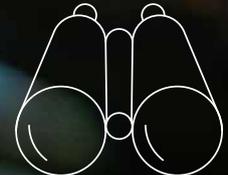
FUTURE TRENDS

Our strategic approach to recovery and destination development across Dublin is designed to ensure we align our development focus on global tourism and visitor trends. Continuous monitoring of international tourism and destination trends, visitor sentiment and international consumer research

will provide us with an additional framework to influence future development activity. This will ensure our experiences are 'fit for purpose' and we will build on the emerging opportunities that Dublin is well positioned to capitalise on.



Source: Deloitte Consulting



Dublin's Convention Centre over the River Liffey, Dublin.

2. DUBLIN – VISION FOR THE FUTURE



2.1. OUR VISION FOR DUBLIN

IT'S 2033 AND DUBLIN RANKS IN THE TOP 3 OF ITS COMPETITIVE SET* WITH TOURISTS CHOOSING TO VISIT BECAUSE OF ITS UNIQUENESS AS A VIBRANT CITY CENTRE NESTLED BETWEEN MOUNTAINS AND A UNESCO BAY, AND BECAUSE IT'S A RECOGNISED GLOBAL LEADER FOR SUSTAINABLE BUSINESS EVENTS.

BOTH DOMESTIC AND INTERNATIONAL TOURISTS ARE STAYING LONGER AND DOING MORE, ENJOYING EXPERIENCES THAT SURPRISE AND DELIGHT, FROM DISTINCT "URBAN VILLAGES" ACROSS THE CITY, EACH WITH A UNIQUE EXPERIENCE TO OFFER, TO AN EASILY ACCESSIBLE MOUNTAIN OFFERING OVERLOOKING THE CITYSCAPE, AND A BAY PEPPERED WITH CHARACTERFUL COASTAL VILLAGES, BUILT HERITAGE AND WATER ADVENTURES.

THERE IS LOTS TO SEE AND DO, BOTH DAY AND NIGHT, WITH ICONIC ATTRACTIONS, BEST IN CLASS EXPERIENCES, WORLD CLASS FOOD, LIVE MUSIC AND EVENTS, INTERNATIONALLY RENOWNED FESTIVALS AND UNRIVALLED NIGHTLIFE. LOCALS ARE AT THE HEART OF THE AUTHENTIC VISITOR EXPERIENCE, AS THEY SHARE THEIR STORIES AND THEIR CITY IN AN ENGAGING AND INHERENTLY DUBLIN WAY. VISITORS CAN NAVIGATE THEIR WAY SEAMLESSLY ACROSS THE REGION USING TICKET-LESS PUBLIC TRANSPORT AND WAY-FINDING THAT IS ACCESSIBLE IN THEIR OWN LANGUAGE.

2.2. OUR STRATEGIC CHALLENGE

DUBLIN - STRATEGIC CHALLENGE STATEMENT

OUR STRATEGIC CHALLENGE FOR DUBLIN RELATES TO HOW WE CONTINUE TO EVOLVE AND ACTIVATE A RELEVANT AND MOTIVATING CITY **DESTINATION** THAT WILL ATTRACT BOTH **HIGH-YIELD** INTERNATIONAL AND DOMESTIC VISITORS BY EFFECTIVELY **MOBILISING** AND **ALIGNING STAKEHOLDERS** BEHIND A **SINGULAR COHERENT** VISION AND VISITOR EXPERIENCE **OFFERING** THAT **EXTENDS** STAY ALL YEAR ROUND.

*Amsterdam, Belfast, Berlin, Copenhagen, Edinburgh, Prague.

2.3. OUR STRATEGIC OBJECTIVES



1

DESTINATION RESILIENCE

Increase destination resilience by optimising visitor mix and maximizing revenue by increasing dwell time and range of activities engaged in.

2

RE-IGNITE BUSINESS TOURISM

Re-ignite business tourism, positioning Dublin as a leader internationally with a focus on sustainability.

3

DIFFERENTIATING EXPERIENCES

Develop differentiating experiences, providing domestic and international tourists with reasons to visit and to stay longer.

4

INDUSTRY AND STAKEHOLDER

Build a committed stakeholder and industry partnership to develop Destination Dublin, encompassing the whole region and leveraging citizen-centric and visitor-centric initiatives for mutual benefit while reducing the industry's carbon footprint and ensuring net contribution to the protection of our cultural and natural heritage.

2.4. ACHIEVING OUR VISION FOR DUBLIN

1	<p>STRATEGIC OBJECTIVE: INCREASE RESILIENCE BY OPTIMISING VISITOR MIX AND MAXIMIZING REVENUE BY INCREASING DWELL TIME AND RANGE OF ACTIVITIES ENGAGED IN</p>
STRATEGIC INITIATIVES	
<ol style="list-style-type: none"> 1. Increased focus on positioning and marketing to the domestic base, increasing consideration of Dublin as a city break for people who live in Ireland. 2. Increase spend and length of stay of core markets, including Northern Ireland, and focus on high yield emerging markets. 3. Collectively grow tourism revenue through targeting high yield market segments. 4. Grow international recognition of Dublin as a leading city destination strongly differentiated by its character and the range of unique things to see and do across all seasons of the year. 5. Motivate domestic visitors to explore our city villages, outdoor amenities and world class attractions all year round. 6. Develop a differentiated approach to non-traditional segments, such as families to drive day trips. 	

2	<p>STRATEGIC OBJECTIVE: RE-IGNITE BUSINESS TOURISM, POSITIONING DUBLIN AS A LEADER INTERNATIONALLY WITH A FOCUS ON SUSTAINABILITY</p>
STRATEGIC INITIATIVES	
<ol style="list-style-type: none"> 1. Invest in capital projects to ensure Dublin remains relevant to changing business visitor needs. 2. Achieve industry sustainability standards to ensure Dublin is a recognised global leader as a sustainable events destination. 3. Deliver a world class end-to-end delegate experience. 4. Ensure Dublin wins its share of business from leads generated. 5. Leverage Dublin's knowledge economy, sectoral strengths, and wealth of FDI companies to attract business events. 	

3

STRATEGIC OBJECTIVE:

DEVELOP DIFFERENTIATING EXPERIENCES, PROVIDING DOMESTIC AND INTERNATIONAL TOURISTS WITH REASONS TO STAY LONGER

STRATEGIC INITIATIVES

1. Re-imagine Dublin for both domestic and international visitors, informed by changes in consumer motivations and expectations post Covid.
2. Raise the profile of the breadth of offering in Dublin, from iconic attractions to hidden gems.
3. Ensure our product portfolio is distinctive in comparison to international competitors' offerings to drive new segments.
4. Optimise festivals that are uniquely Dublin/Irish and support the ongoing creation of those that enable us build differentiating propositions, particularly in the winter/shoulder months.

4

STRATEGIC OBJECTIVE:

BUILD A COMMITTED STAKEHOLDER AND INDUSTRY PARTNERSHIP TO DEVELOP DESTINATION DUBLIN, ENCOMPASSING THE WHOLE REGION AND LEVERAGING CITIZEN-CENTRIC AND VISITOR-CENTRIC INITIATIVES FOR MUTUAL BENEFIT WHILE REDUCING THE INDUSTRY'S CARBON FOOTPRINT AND ENSURING NET CONTRIBUTION TO THE PROTECTION OF OUR CULTURAL AND NATURAL HERITAGE

STRATEGIC INITIATIVES

1. Get the balance right between the vibrant city at the core, with the known appetite of international visitors particularly to look for more (typically outdoors) from a city break.
2. Improve the online shop window of the Dublin offering, selling the benefits of the region as a whole, to drive consideration and bookings.
3. Engage industry and stakeholders to activate the brand across the region, with an agreed, shared vision that encapsulates the full offering of the destination.
4. Invest in way-finding and discovery points throughout the region to enable the visitor to navigate their way seamlessly across the city and county.
5. Partner with key stakeholders to optimise public transport options to ensure ease of access throughout the region, beginning at the airport.
6. Harness the development of new or enhanced city quarters to create new brand stories and visitor experiences.
7. Support the uptake of sustainability measurement and certification programmes at both enterprise and destination levels.

3. DUBLIN REGIONAL TOURISM PLAN – STRATEGIC FRAMEWORK



3.1. STRATEGIC FRAMEWORK 2023 – 2027

The strategic framework has been developed to achieve the vision for Dublin while overcoming the strategic challenges we face in the coming years. It begins by outlining our approach to achieving greater levels of sustainability in tourism (*Sustainability Strategy*). It establishes who we are targeting and how we will target them (*Visitor and Brand Strategy*). It identifies the requirement to match the delivery of experiences with what the visitor is looking for and how we will provide them (*Destination Development Strategy & Product Development Strategy*).

The framework outlines how we will enable and assist the industry to grow its capacity and capability and deliver on this strategy (*Industry Development Strategy*). The manner in how we will improve the distribution pipeline for the industry's saleable experiences (*Distribution and Business Development Strategy*) and what will be done to effectively market the region (*Marketing Strategy*) represents further strands guiding our strategic approach.

We will ensure we build capacity within local communities and ensure that they benefit directly from tourism and that tourism works to enhance their lives (*Community Strategy*) while ensuring we protect the environment and avoid any negative impacts on it (*Environmental Protection & Promotion*). The strategic initiatives are outlined over the five-year time-frame of the plan. They provide the basis for a collective approach to deliver the strategy and what a range of stakeholders will work together on to ensure we deliver on the target objectives defined in section 2.3.

TO ENSURE THE STRATEGY REFLECTS OUR SUSTAINABLE TOURISM GOALS, THE PLAN DELIVERY FRAMEWORK ADOPTS THE VICE MODEL TO GUIDE THE PLAN IMPLEMENTATION.

SUSTAINABLE TOURISM MOD



SUSTAINABILITY



INDUSTRY

COMMUNITY

ENVIRONMENT

EL



Couple walking in the Dublin Mountains.

3.2. SUSTAINABILITY, CLIMATE ACTION AND BIODIVERSITY STRATEGY



Against the backdrop of the *UN Sustainable Development Goals*, Government's commitments under the *The Paris Agreement*, and the national *Climate Action Plan 2021*, which includes actions that are relevant to Fáilte Ireland as a key stakeholder. Fáilte

Ireland's approach to tourism development is to ensure that it becomes increasingly sustainable and continues to generate incremental revenue to sustain and increase levels of employment in local communities while identifying and measuring progress in relation to meeting of national and sectoral commitments relating to emission targets.

For over ten years, Fáilte Ireland has employed the internationally recognised VICE approach to sustainable tourism focusing on the interaction between Visitors (V), the Industry (I) that serves them, the Community (C) and culture that hosts them and their collective impact on and response to the Environment (E) to guide the future sustainable development of tourism.

Our approach aligns with UNWTO definition of sustainable tourism as "Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities". It reflects the organic relationship Fáilte Ireland envisages between our tourism industry partners, the communities where we work and the natural and built environment which makes the Irish tourism product so unique.

Since 2021, Fáilte Ireland's approach has also incorporated a specific suite of actions across all its work based on recommendations of the Sustainable Tourism Working Group (STWG). The recommendations (www.gov.ie/en/publication/c0cd3-sustainable-tourism-working-group-report) in the 2021 report are intended to promote sustainable tourism practices prior

to the development of a new national tourism policy, which mainstreams sustainability.

The report stresses the interrelated nature of environmental, social and economic aspects of sustainable tourism development. It identifies the key role of the tourism sector in helping to deliver Ireland's commitments under the Paris Agreement on Climate Change, featured in Ireland's Climate Action Plan 2021. Fáilte Ireland is committed to working towards ensuring that the tourism sector plays its part to help deliver Ireland's commitments under the *Paris Agreement on Climate Change* and under Ireland's 2021 Climate Action Plan. Fáilte Ireland will adhere to these plans during the lifetime of this strategy.

The actions contained in the Sustainable Tourism Working Group report directly influence all workflows across the organisation. These are captured under each of the strategic pillars of Fáilte Ireland's corporate strategy "*Strategy to 2023 – From Survival to Recovery*", but in particular under the Driving Climate Action strategic pillar, which includes the following key activities:

- **Driving Change through Knowledge and Metrics** where Fáilte Ireland's Research team is working to establish a benchmarkable CO² value for Irish tourism and a carbon calculator for tourism businesses;
- **Driving Change at the Level of the Business** where Fáilte Ireland's Enterprise Development team is working to develop an industry focused toolkit based on best practices to support businesses to understand and embed carbon reduction activities;
- **Driving Change at the Level of the Destination** where the regional development team, in conjunction, with local authorities and other partners, will work with destinations in the region to benchmark their sustainability performance and take steps to progress them on their sustainability journey over the course of each DEDP, including improved access to public transport options.

And where our commercial development team works with each regional convention bureau to improve their Global Destination Sustainability index scores year on year;

- **Promoting Change through our Visitors**

where our Marketing and Commercial Development teams will create new sales and marketing opportunities for those sustainable tourism businesses that are providing more sustainable options for our visitors.

Ireland has ratified the United Nations (UN) Convention on Biological Diversity, and all subsequent protocols and is fully committed to halting the loss of biodiversity and the degradation of ecosystem services as set out in the EU Biodiversity Strategy for 2030. Government policy on nature conservation is outlined in the National Biodiversity Action Plan 2017–2021 (NBAP) which includes Ireland's vision for biodiversity: 'That biodiversity and ecosystems in Ireland are conserved and restored, delivering benefits essential for all sectors of society and that Ireland contributes to efforts to halt the loss of biodiversity and the degradation of ecosystems in the EU and globally. In accordance with Objective 1 of the NBAP to 'Mainstream biodiversity into decision-making across all sectors'. Fáilte Ireland, in implementing this strategy, will aim to comply fully with the NBAP with regard to the protection, restoration and enhancement of biodiversity.

Together with the VICE approach to regional tourism development, these actions reflect how Fáilte Ireland will embrace an integrated and collaborative effort across the tourism sector to drive the broad ambition for Ireland to be amongst the world-leaders in sustainable tourism practice.

Our ambition and practical support to improve tourism sustainability is evident at the regional and destination levels. From integrating sustainability goals into Destination and Experience Development Plans (DEDPs) in collaboration with local stakeholders, to providing practical tools for the tourism sector to measure and reduce its carbon footprint. It will seek to support the recruitment and retention of jobs in the tourism sector. It represents a holistic and practical approach to sustaining and growing tourism's contribution to the economy, local communities and the environment, underpinning our efforts in

this Regional Tourism Development Strategy.

Our approach also seeks to go one step further by engaging the visitor fully in the life of the communities, environment and heritage as the core of Ireland's tourism offering. Fáilte Ireland aims to work with our partners to sustain the tourism sector and support a regenerative approach to tourism development. The COVID-19 global pandemic has accelerated the level of visitor consciousness of their role in sustainability and responsible tourism. Sustainable destination development, especially in rural areas, must align with shifts in visitor expectations in re-defining the value of an experience with new levels of environmental awareness. Our approach to sustainable tourism development across the regional brands will become part of the story we tell and determine how our brand and its associated stories resonate with domestic and international visitors.

Decarbonising the tourism sector is a key priority of this strategy. Fáilte Ireland is committed to working towards ensuring that the tourism sector plays its part to help deliver Ireland's commitments under the Paris Agreement on Climate Change and under Ireland's 2021 Climate Action Plan. Fáilte Ireland will adhere to these plans during the lifetime of this strategy.

For Dublin, the most important sustainability challenges will be to reduce the carbon footprint of the tourism industry, facilitate the growth of tourism revenue while keeping within environmental capacities and ensuring tourism activities do not impact negatively on sensitive environments, habitats and species, or on local communities. The views of the local community should always be listened to, and they must be at the centre of any decision-making affecting the place where they live.

Given that the tourism offering is based in part on the natural and built heritage of Dublin, it is crucial that the quality, character and distinctiveness of these assets are protected, and any development enhances and protects the heart of its offering. Strong visitor management and the pursuit of value over volume will play a key role in enabling visitors to enjoy the city in a manner that will protect it for future generations. A strong focus is also required on reducing the carbon footprint of the industry.

3.3. VISITOR STRATEGY

RATIONALE

Our visitor strategy will be guided by a new Domestic Motivations Framework model and a clear understanding of consumer motivations for travel through continuous visitor research. Similarly, we will be guided by the Tourism Ireland global segmentation model and any further iterations of it over the coming years. This will provide new opportunities for differentiated approaches in the marketing and promotion of Dublin.

Dublin has traditionally been very dependent on international visitors, and typically these visitors either come for a city break or stay in Dublin as a "top or tail" to a longer trip to Ireland. Research tells us that many visitors including domestic, and indeed locals, are unaware of the full breadth of the Dublin offering.

Fáilte Ireland is also cognisant that the emergence of remote and hybrid working, and widespread adoption of video conferencing platforms may result in a permanent reduction in the level of transient international business travel into Dublin with negative impacts on hotels and restaurants. This scenario will need to be tracked and new sources of promotable business tourism or domestic and international leisure tourism may need to be developed to cover any loss of business that emerges.

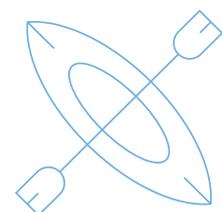
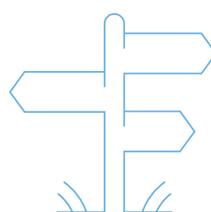
The objective of the visitor strategy from a domestic perspective is to create awareness of the range of the city's offering to drive incremental revenue and longer stays from unconstrained adults, with a particular focus on Northern Ireland. There is also an opportunity to tap into the "locals" or close counties market by encouraging people within proximity of the city to come and explore what the capital has to offer.

Whilst unconstrained adults will remain the bullseye target market, there is an opportunity to attract new segments such as families and day-trippers, which will be essential to delivering revenue in the short to medium term.

In terms of international visitation, Dublin is focused on two key consumer segments, the Culturally Curious and Social Energisers. Both are sizeable segments but have differing needs and will be reached in different ways. For international visitors, the strategy is to retain existing markets and diversify into new high yield markets/segments with a key objective to drive consideration and booking of longer stays.

The Tourism Ireland COVID-19 research tracker in June 2021 indicates that a mix of outdoors/rural and city breaks is the most popular type of break indicating that visitors want the best of both worlds. The focus will be on positioning Dublin as a must do city break with a difference, with new propositions like the Dublin Coastal Trail substantiating that position and appealing to new segments, such as those seeking to be active in nature during the day, whilst having access to a vibrant city nighttime offering.

There will also be a focus on higher yield international segments such as luxury, golf and business tourism. Business tourism is a core market opportunity for Dublin. Given the higher value of a business delegate compared to a leisure tourist, this segment will play an important role in delivering revenue in the short to medium term.



UNDERSTANDING OUR VISITORS

INTERNATIONAL VISITORS

International tourism is a vital part of the Irish economy. It is integral to sustainable regional development and an important source of employment. Dublin traditionally attracts the highest percentage of total international tourists across all regions. They stay for a shorter period versus other regions at 4.7 nights. Tourists typically come from near markets for a city break. Those visiting from further away, are likely to visit the capital city as either a top or tail to a longer holiday in Ireland. In 2019, Dublin welcomed 6.6m overseas tourists, with a total spend of €2.2bn.

Average spend per capita is €333, which is lower than all other regions and is likely driven by shorter stays. However, looking at the relative value of tourists across key source markets is key to determining opportunity in the medium term. A split of tourist numbers and associated revenues from our four core markets for 2019 is outlined on the right:

BRITAIN	
VISITORS	REVENUE
29%	16%
NORTH AMERICA	
VISITORS	REVENUE
23%	31%
MAINLAND EUROPE	
VISITORS	REVENUE
40%	37%
OTHER	
VISITORS	REVENUE
8%	16%

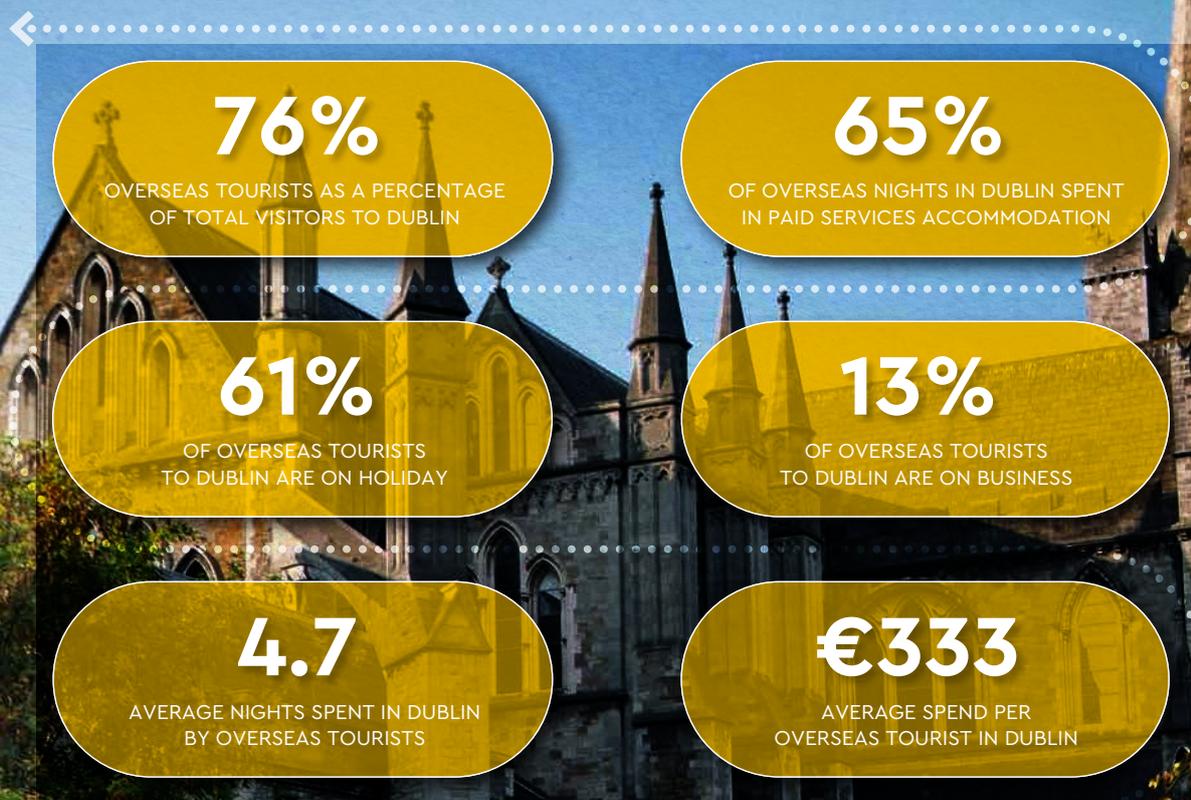


Traditional Windmill, Skerries, County Dublin.

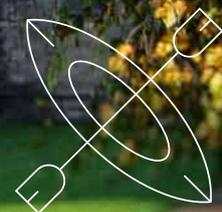
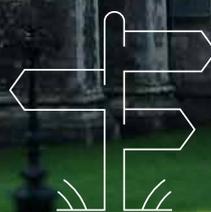
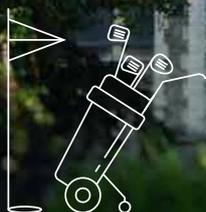
In terms of relative performance of markets, 29% of overseas tourists came from Britain in 2019 making this the most important market in absolute number terms. As with all four core international markets, tourist numbers have continued to grow from GB from 2017-2019, however Britain was growing at a slower pace (+8%) than total market growth (+12%) and significantly less than North America and other markets, which are growing at +15% and +17% respectively over the same period.

Whilst Great Britain delivers significant volume of visitors, this market represented just 16% of total revenue from international tourists, with a growth in revenue of +8% (versus 2017) compared to +18% from North America and other markets at +11%. This is significant as it is likely that near markets will return more quickly than others, and even with a return of British tourists, there could remain a significant revenue shortfall for businesses.

SUMMARY PROFILE



Source: Fáilte Ireland, 2019



WHAT MOTIVATES VISITORS FROM OUR KEY INTERNATIONAL MARKETS

BRITISH

Due to proximity, British holidaymakers may feel like they know what Ireland has to offer and that it might be similar to what is available closer to home.

GERMANY

Ireland's dramatic coastal scenery is a unique selling point (USP) to the German market. Germans are more likely to consume the landscape in an active way, while soaking up the atmosphere of the authentic local culture is also important.

FRANCE

French holidaymakers enjoy getting off the beaten track, away from perceived tourist hotspots as a means to explore unspoilt landscapes. French visitors are attracted to authenticity and local experiences.

USA

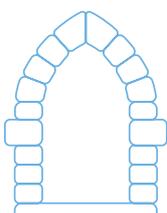
American holidaymakers like lots of variety in their holiday itinerary and prefer 'bite sized' experiences so they can explore a wide range of experiences. Iconic historic attractions differentiate Ireland and are an important driver of travel for the USA market. Activity is generally of an easy nature as they explore and engage with landscape and historical sites.

Dublin is the most popular destination for business travel amongst the four regional brands, representing 13% of international visitors in 2019. While Dublin is the main access point into the country, it is also the hub for foreign direct investment, which is not only an inflow of capital but also a contributor to the economic development of the country.

Dublin offers a wide variety of 4/5* accommodation available throughout the city, which in turn places Dublin in a favourable position within the Association and Conference sector.

The MICE sector is one of the most sought-after and lucrative market segments amongst DMOs in the world today, because of its revenue, seasonality and regionality profile, is almost perfect i.e. high spending visitors who travel in the shoulder season and visit regions.

According to the CSO, in 2019 business travel as a whole was worth over €716m (of the total overseas revenue of €2.2bn) to the Irish economy. A typical business event visitor is worth up to €1,600 to the economy, two to three times the value of a leisure visitor.



DOMESTIC VISITORS

Traditionally, Dublin was not high on the consideration set for domestic visitors, with most coming to the city for specific reasons – sporting or music events, or to visit friends and family.

As a proxy of penetration, only 15% of domestic tourists visited Dublin on their last trip in the Republic of Ireland.

Dublin ranks significantly behind other regions when it comes to share of trips taken.

Fáilte Ireland's new Motivations Segmentation for the domestic market has unlocked insights that have allowed the region to identify priority segments for targeting and development. Research has shown that, of the drivers for taking a trip, motivation is the most important reason (significantly so, at more than double the next driver) for trip behaviour.

After motivation, in rank order, what visitors wanted to do, when they want to take a trip, and lastly, who with (and other demographics), including travel party, are the balance of the drivers of taking a trip.

The definitions of each of the motivations are as follows:

-  **Social Energy:** to enjoy the atmosphere, vibrancy and energy of a place.
-  **Adventure:** to push myself and do things out of my comfort zone, mainly in the outdoors.
-  **Exploration:** to explore the new and unfamiliar in an area, including culture.
-  **Time Out:** to escape my everyday life and de-stress.
-  **Reconnection:** to relax and do very little, mainly with person or friends close to me.
-  **Bonding:** to nurture the relationships with my family and those close to me.
-  **Celebration:** to celebrate a special occasion.



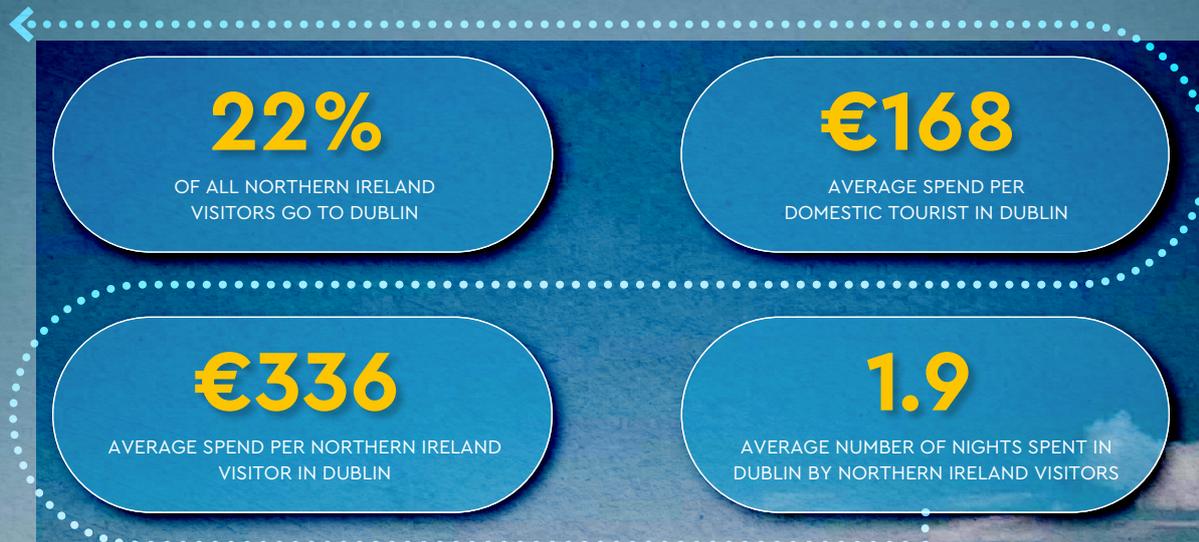
Source: Fáilte Ireland.

The single most important motivator for domestic tourists for Dublin is Social Energy, which mirrors the younger, single profile of these tourists. Dublin also attracts unconstrained couples of all ages. The nightlife is a key draw in this motivation but the city generally does not stand out from other regions on any of the other typical motivations or mindsets. However, it is of note that Dublin does over-index on the motivation of adventure, with many tourists seeing outdoor activities such as walking, playing in this space.

Domestic tourists are staying in Dublin hotels and generally plan their trips in advance, rather than being spontaneous.

The Northern Ireland market represents a significant opportunity for Dublin, with direct rail access, and the highest spending visitors in 2019 at €336 per capita (compared to €333 for overseas tourist spend, and just €168 for visitors from ROI). This is significant as their average bednights were just 1.9 in comparison to overseas tourists at 4.7 nights.

However, it is worth noting that the Northern Ireland market was the only market declining in terms of visitor numbers from 2017-2019 (332k versus 283k), so this market will be a core focus for the coming years.



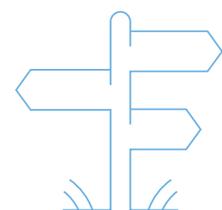
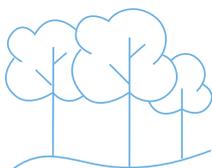
Source: Fáilte Ireland's Survey of Overseas Travellers (SOT)



STRATEGIC FOCUS FOR OUR VISITOR STRATEGY – ADDRESSING OUR STRATEGIC OBJECTIVES

1	<p>STRATEGIC OBJECTIVE: INCREASE RESILIENCE BY OPTIMISING VISITOR MIX AND MAXIMIZING REVENUE BY INCREASING DWELL TIME AND RANGE OF ACTIVITIES ENGAGED IN</p>
STRATEGIC INITIATIVES	
1.	Use newly launched Domestic Motivations Framework to unlock insights that inform positioning and messaging to core target markets.
2.	Tourism Ireland will create a new global segmentation model in partnership with Fáilte Ireland.
3.	Focus on core international markets including Europe, Great Britain, USA, in addition to high yield opportunities such as Nordics and emerging markets.
4.	Create compelling reasons for the domestic tourist to visit Dublin, with a specific focus on Northern Ireland.
5.	Explore the family segment, particularly in relation to driving the day trip market opportunity.
6.	Explore sustainable & responsible opportunities for niche wildlife enthusiasts e.g. Continental European birders viewing bird species in Dublin Bay.
7.	Develop industry supports to optimise business mix, focusing on revenue generation and core high yield markets.

2	<p>STRATEGIC OBJECTIVE: RE-IGNITE BUSINESS TOURISM, POSITIONING DUBLIN AS A LEADER INTERNATIONALLY WITH A FOCUS ON SUSTAINABILITY</p>
STRATEGIC INITIATIVES	
1.	Continue to work with the Fáilte Ireland Business Tourism and Dublin Convention Bureau teams to attract increased high yield business visitors across the association conference, incentive and corporate meeting segments to Dublin.
2.	Support the development of a City Charter for business events.
3.	Create a suite of knowledge-based bidding materials to sharpen our lead generation prospects.
4.	Invest in product and experience development to aid conversion (i.e. gala dinner venues, saleable experiences).



3.4. BRAND STRATEGY

The brand proposition for Dublin is rooted in insight, from research undertaken at the time of its development. It speaks to the uniqueness of Dublin with a city centre synonymous with fun, vibrancy and activity, nestled between a UNESCO biosphere and the Dublin mountains. COVID-19 has further validated this position. There is a clear desire amongst visitors, particularly

international markets, to experience more than a standard city offering. The strategy for the brand is to embed this proposition and bring it to life across all experience development, marketing, and communications, drawing out the idea of surprising experiences, and the unique geographic position to drive differentiation.

STRATEGIC FOCUS FOR OUR BRAND STRATEGY – ADDRESSING OUR STRATEGIC OBJECTIVES

3

STRATEGIC OBJECTIVE:

DEVELOP DIFFERENTIATING EXPERIENCES, PROVIDING DOMESTIC AND INTERNATIONAL TOURISTS WITH REASONS TO STAY LONGER

STRATEGIC INITIATIVES

1. Embed the brand proposition in all experience development, informed by both international and domestic insights.

4

STRATEGIC OBJECTIVE:

BUILD A COMMITTED STAKEHOLDER AND INDUSTRY PARTNERSHIP TO DEVELOP DESTINATION DUBLIN, ENCOMPASSING THE WHOLE REGION AND LEVERAGING CITIZEN-CENTRIC AND VISITOR-CENTRIC INITIATIVES FOR MUTUAL BENEFIT WHILE REDUCING THE INDUSTRY'S CARBON FOOTPRINT AND ENSURING NET CONTRIBUTION TO THE PROTECTION OF OUR CULTURAL AND NATURAL HERITAGE

STRATEGIC INITIATIVES

1. Develop a shared vision for the city with key stakeholder groups to optimise Dublin's position on an international stage.
2. Ensure the newly launched Visit Dublin website is fully optimised including provision of multi-channel content for use across industry digital platforms.
3. Develop a focused brand adoption programme across the whole region to enable all stakeholders to align behind the proposition and speak with one voice internationally and domestically.
4. Re-establish a Dublin Champions programme.

3.5. DESTINATION DEVELOPMENT STRATEGY

RATIONALE

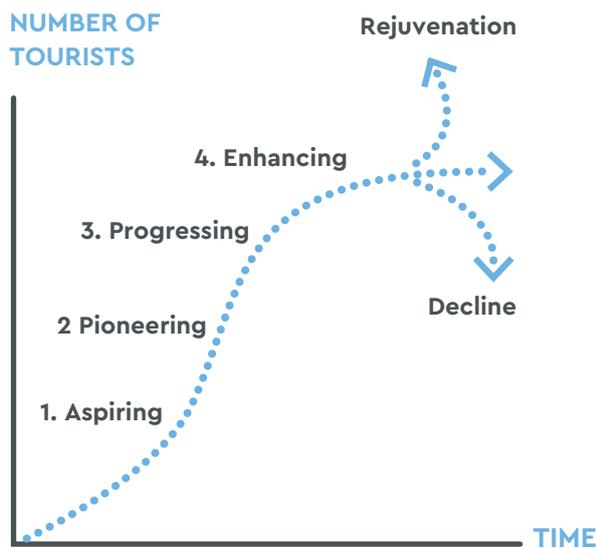
Developing distinctive destinations requires a multi-layered approach reflecting the range of factors that influence the visitor experience.

Our approach to sustainable destination development recognises the collective inputs of all key stakeholders aligned to a shared vision to grow the competitiveness of Dublin as a destination.

DESTINATION MATURITY MODEL GRID

Our destination development framework recognises the differences that exist in destination maturity across the region. This requires a dedicated approach for each destination based on their maturity levels. Four levels of destination maturity have been identified within our framework. They start with aspiring destinations representing areas with low tourism development experience. The stages of destination maturity grow from this **ASPIRING** level to **PIONEERING** before developing into more mature tourism destinations defined as **PROGRESSING** and **ENHANCING**.

Destination Maturity Model



Adapted from Butler, (1980), Tourism Area Life Cycle.

Each maturity level is defined through a set of assessment criteria focused on creating distinctive destinations. These include factors such as current levels of recognition within the overseas and domestic markets and density and quality of tourism products and accommodation. Additional considerations include the depth of services (day and evening time) available for visitors in the primary and secondary hubs in the destination and the strength of local tourism industry networks.

The four destination maturity categories each establish key objectives to be achieved in the course of this regional plan. In destinations possessing the characteristics of a very mature area (i.e. Enhancing), the core objectives will include visitor experience innovation and visitor dispersion. Areas categorised as Aspiring or Pioneering destinations with lower levels of tourism maturity will focus on development activity such as product development, improving visitor infrastructure and building effective local tourism networks.

The intention is to consider Dublin as three distinct areas, each at different levels of maturity. Over the course of the next number of years, there will be a total of three DEDPs for Dublin, in addition to an activation programme developed for the coastal villages. Based on the Destination Development Framework, the three destinations in the region are considered as follows:

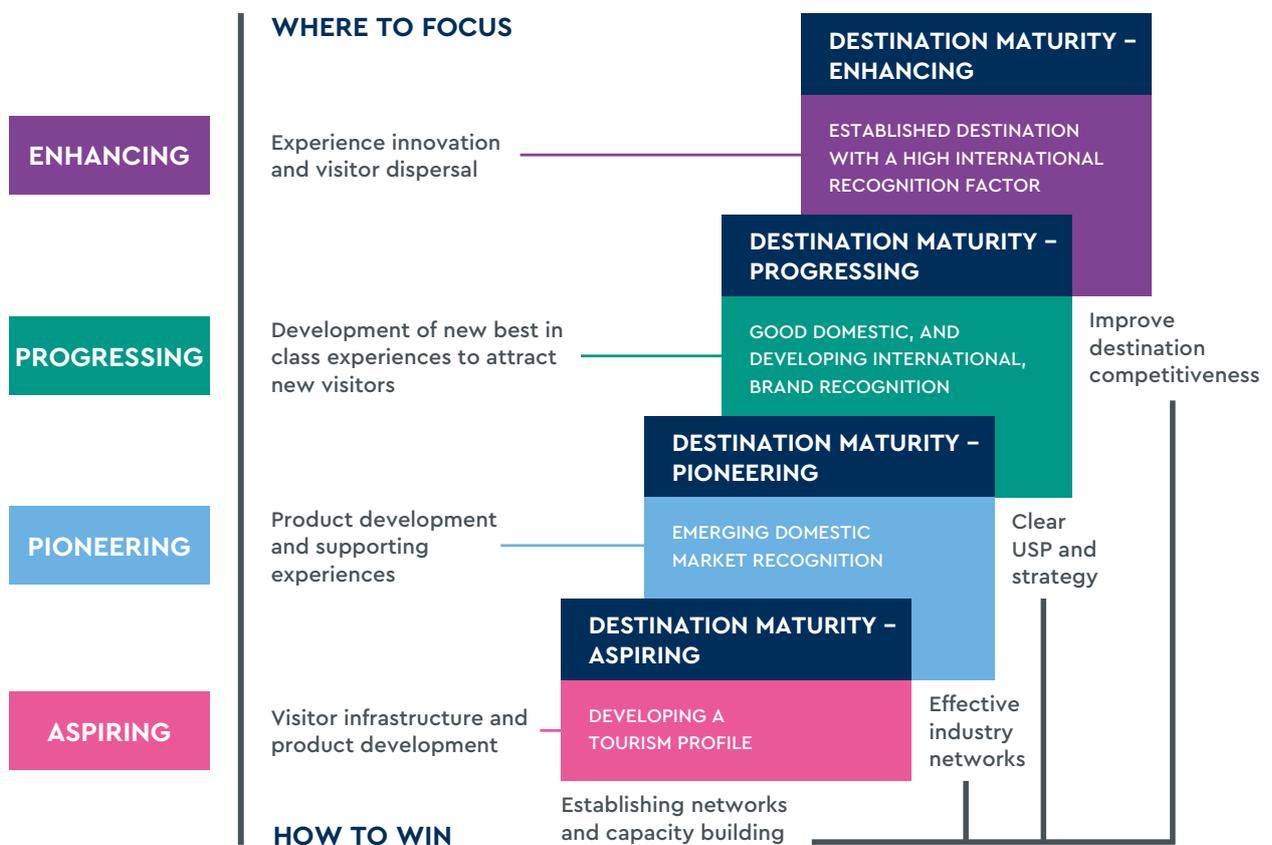
DUBLIN CITY CENTRE
MATURITY LEVEL – ENHANCING
DUBLIN COASTAL VILLAGES
MATURITY LEVEL – PROGRESSING
DUBLIN MOUNTAINS
MATURITY LEVEL – PIONEERING

These destination maturity classifications provide us with the development context for the Regional Tourism Development Strategy over the next five years. Sustainable destination development will be achieved through a blend of activity guided largely by Destination and Experience Development Plans (DEDP) for all areas across the region.

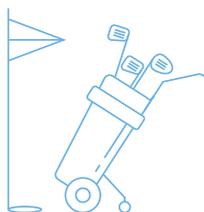
They represent five-year commercial development plans for focused geographies across the region, identifying the projects

that will make the most impact in growing the tourism competitiveness of each area.

Aligned with the respective DEDPs, there will be a new focus on influencing visitor flow across Dublin, growing the range and quality of our accommodation stock and improving accessibility. It will include initiatives to improve access and grow sustainable transport options while working closely with local stakeholders to continue to develop Dublin into a vibrant visitor hub.

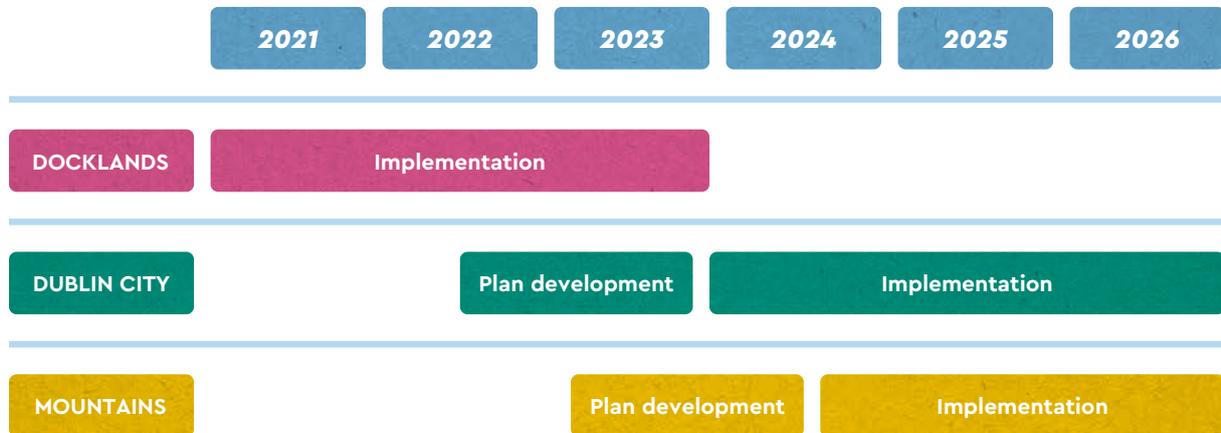


Source: Fáilte Ireland & Repucon Consulting.





3.5.1. DESTINATION AND EXPERIENCE DEVELOPMENT PLANS



DUBLIN CITY CENTRE MATURITY LEVEL – ENHANCING

Pre-covid an “over-tourism” narrative was creeping into the public discourse where pinch points, typically between the canals, necessitated a strategy to spread footfall throughout the city, and along the coast, to alleviate capacity pressure points. However, Covid has changed this completely, whereby it was the coastal towns that thrived during the pandemic, with high footfall from local and domestic visitors. Whilst Dublin city experienced the most significant adverse impact from Covid, it is the main reason for visitation to the capital.

The Docklands DEDP is currently at implementation stage, with clear programmes in place to develop and enhance experiences to provide a wider range of opportunities for the visitor to engage with the destination. This is supported by a shared vision, agreed by all stakeholders, that enables a consistent positioning to inform product and experience development, marketing and promotional initiatives.

For the wider city centre, there are significant plans for both public and private investment to develop the city in the coming years. It is crucial that all future developments take cognisance of the needs of the citizen and the visitor, ensuring the city returns to the vibrant capital that differentiates it internationally. A DEDP for Dublin city is planned for development and implementation in the next five years, to create unique and distinct “urban villages” within the city, to drive both international and domestic visitation.

DUBLIN COASTAL VILLAGES MATURITY LEVEL – PROGRESSING

The Dublin Coastal Trail launched in 2022. It is the first significant development to support the proposition of a vibrant city centre, located beside a UNESCO designated bay. This trail has been created to enable visitors travel easily and seamlessly from city centre hubs into Dublin's coastal villages. These villages have good domestic recognition and the launch of the Coastal Trail includes a significant focus on increasing awareness and visitation from international markets.

The villages are not uniform in their challenges in terms of footfall and spend. However, all have an opportunity to drive more engagement and revenue from international visitors. Core to this is the clarification and showcasing of each village's offering, and harmonising and enhancing their digital presence and footprint. Enhancing and showcasing under-performing products and developing new targeted experiences aimed at free independent travellers (FITs), will help bring the coastal villages and the proposition to life.

Also core to this is creating experience sets (focused initially on water-based activities & the UNESCO biosphere) with a particular focus on those experiences which signal the coastline's appeal to higher spending segments. Additionally, there will be an increased focus on improving the in-destination experience through the scheduling of new and/or newly FIT-friendly experiences across the Coastal Trail.

DUBLIN MOUNTAINS

MATURITY LEVEL – PIONEERING

There are many businesses, mostly activity providers, already operating in the Dublin mountains. However, there is no central focal point for visitors and access is an issue. It is intended that a Dublin mountains DEDP will focus on this area, with strategic linkages to surrounding businesses and the development of appropriate infrastructure and orientation to support visitor access, particularly international visitors.

International and domestic research indicates that visitors are looking for more to see and do for city breaks and the development of the Dublin mountains DEDP will also harness the appeal and reach of the activity product hub that is developing in the area.

The Dublin mountains are intertwined with the Wicklow mountains product so working closely with the Ireland's Ancient East region in the development of this DEDP is critical.

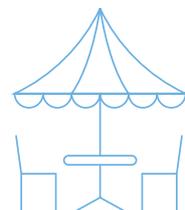
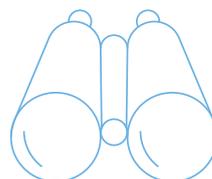
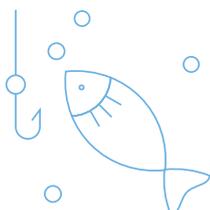
DEVELOPING VIBRANT TOWNS AND VILLAGES

A tourism destination town is one in which a visitor can spend an overnight, and in which

a cluster of products, services, activities and experiences are offered. It incorporates various stakeholders and intangible elements, such as its character, image and identity and can function as a touring base for visitors. For a tourist to consider a town as a destination where they would stay at least one night, it must broadly have:

1. At least one attractor/asset that can drive demand
2. A variety of things to do and see
3. A variety of places to sleep and eat

Those towns that provide a wide variety of products, services and experiences can increase visitor dwell time and expenditure in local businesses and communities. A town that hopes to attract staying visitors must be able to offer them, at the very least, sufficient attractions, activities, and entertainment within the town itself to provide ample engagement for more than eleven hours a day, including three hours in the evening. They can successfully deliver both a daytime and nighttime economy offering. Ideally, tourists will leave the town feeling there was more they could have done or seen, and they had not exhausted the opportunities and are therefore eager to return for more.



STRATEGIC FOCUS FOR DEDP & TOWNS & VILLAGES STRATEGY – ADDRESSING OUR STRATEGIC OBJECTIVES

1	<p>STRATEGIC OBJECTIVE: INCREASE RESILIENCE BY OPTIMISING VISITOR MIX AND MAXIMIZING REVENUE BY INCREASING DWELL TIME AND RANGE OF ACTIVITIES ENGAGED IN</p>
STRATEGIC INITIATIVES	
<ol style="list-style-type: none"> 1. Support industry to develop and grow the activity/outdoors market segment. 	

3	<p>STRATEGIC OBJECTIVE: DEVELOP DIFFERENTIATING EXPERIENCES, PROVIDING DOMESTIC AND INTERNATIONAL TOURISTS WITH REASONS TO STAY LONGER</p>
STRATEGIC INITIATIVES	
<ol style="list-style-type: none"> 1. Develop and implement a DEDP for the city centre. 	
<ol style="list-style-type: none"> 2. Implement docklands and mountains DEDPs to augment city offering. 	
<ol style="list-style-type: none"> 3. Implement the activation programme for coastal villages. 	

4	<p>STRATEGIC OBJECTIVE: BUILD A COMMITTED STAKEHOLDER AND INDUSTRY PARTNERSHIP TO DEVELOP DESTINATION DUBLIN, ENCOMPASSING THE WHOLE REGION AND LEVERAGING CITIZEN-CENTRIC AND VISITOR-CENTRIC INITIATIVES FOR MUTUAL BENEFIT WHILE REDUCING THE INDUSTRY'S CARBON FOOTPRINT AND ENSURING NET CONTRIBUTION TO THE PROTECTION OF OUR CULTURAL AND NATURAL HERITAGE</p>
STRATEGIC INITIATIVES	
<ol style="list-style-type: none"> 1. Partner with public and private organisations for the visitor's voice to be included in future developments. 	
<ol style="list-style-type: none"> 2. Partner with local authorities to identify investment opportunities to deliver destination KPIs. 	
<ol style="list-style-type: none"> 3. Align with key stakeholders to optimise the nighttime economy proposition across the region. 	

3.5.2. ACCOMMODATION STRATEGY

Tourist accommodation is a vital part of the tourism and leisure product in Dublin. While accommodation is just one part of a wider tourism product, which encompasses a much broader spectrum of attractions, activities and festivals, it is nonetheless a core component of what makes up a successful tourist destination, and its presence in a destination is instrumental in facilitating overnight stays and maximising tourism spend in the area through restaurants, cafes, pubs and other product areas, with significant

benefits for local communities and local residents. Tourist accommodation and especially hotels, also play an important role as a community hub in a local area, which provides other benefits for local residents, local businesses and others.

Failure to provide adequate tourist accommodation in a tourist destination, will ultimately lead to a situation where potential overnight visitors will instead become lower spending day-trippers. A lack of adequate tourist accommodation might deter potential tourists from visiting Dublin

leading to a loss of revenue for local tourism businesses and other related businesses. This injection of economic activity could be lost to the local economy, with knock-on effects for local employment and for the wider community benefits that such premises provide.

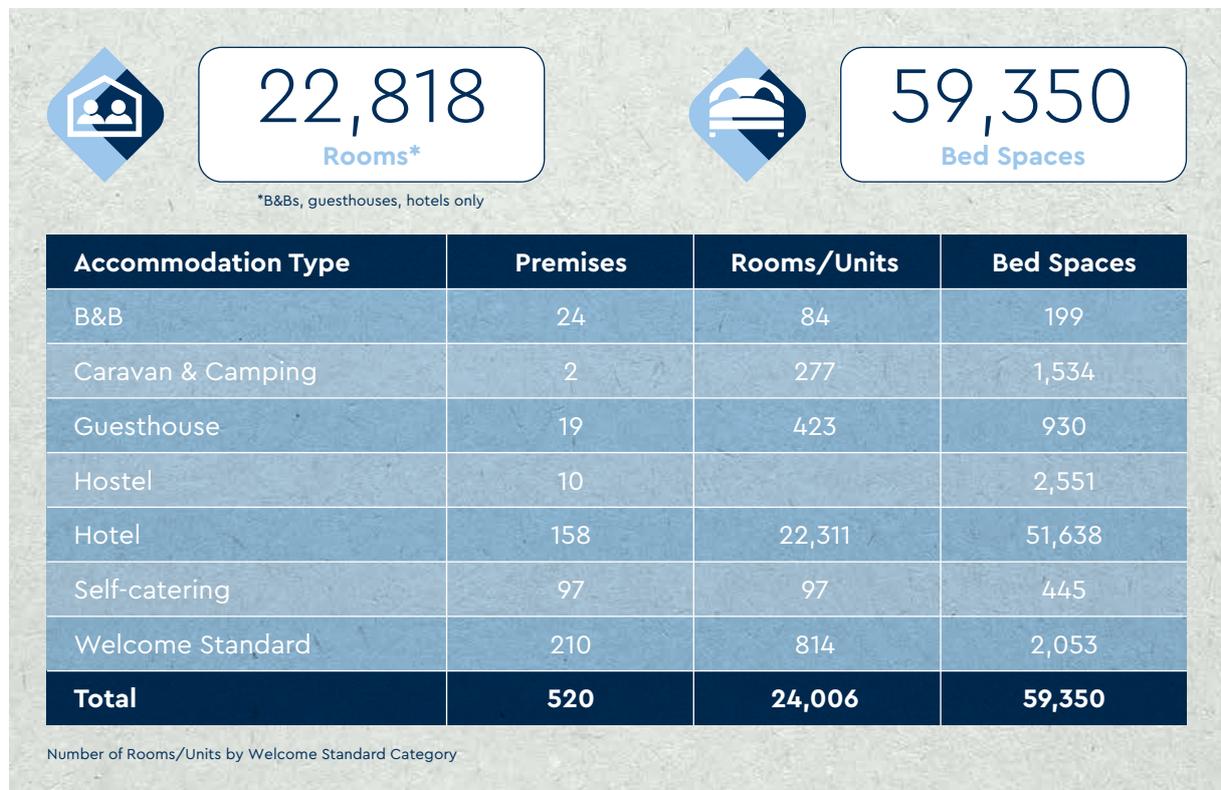
There are 158 hotels in Dublin making up 30% of the premises in Dublin but providing 93% of the rooms/units and 87% of the total bedspaces. As at mid-2022, there are 22,311 hotel bedrooms in Dublin of which approximately 14,000 are situated in the Dublin city centre area. While difficult to make absolute comparisons without a uniform rating system, Dublin likely over-indexes on 4-star hotels and under-indexes on 3-star properties compared to competitor cities. Despite the effects of the COVID-19 pandemic, there remains a strong pipeline of new product due to come on stream in the coming years with up to 4,000 additional hotel rooms to be delivered in Dublin up to the end of 2024.

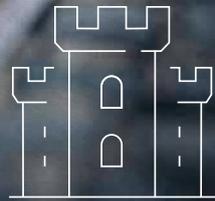
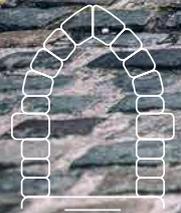
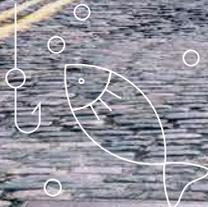
According to STR data, pre-Covid occupancy levels in Dublin were over 82% (2019), which was made up predominantly of business and transient leisure travellers.

The loss of international tourists during the pandemic effectively decimated occupancy in Dublin (particularly in city hotels) with many hotels reporting single digit occupancy for much of 2020.

While the initial recovery in 2022 was stronger than anticipated due partly to the release of pent up demand post COVID-19, longer term the business mix in Dublin will take longer to stabilise.

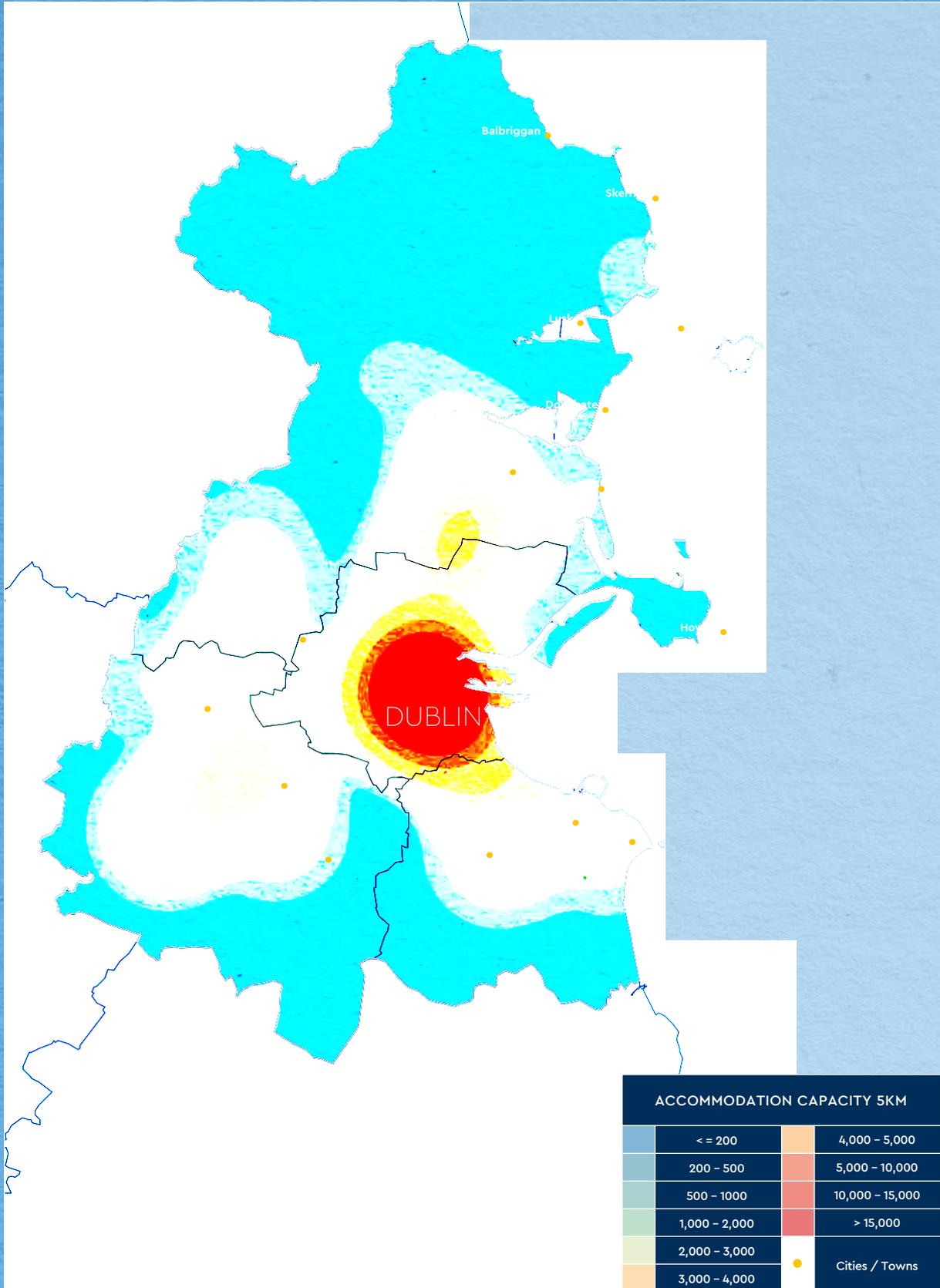
Pre-pandemic, little focus was given to the domestic or family markets, however, post-pandemic, it is likely that Dublin will need more flexible, varied accommodation that will cater to a wider business mix, as transient corporate and international tourists are likely to return at slower levels than other segments.





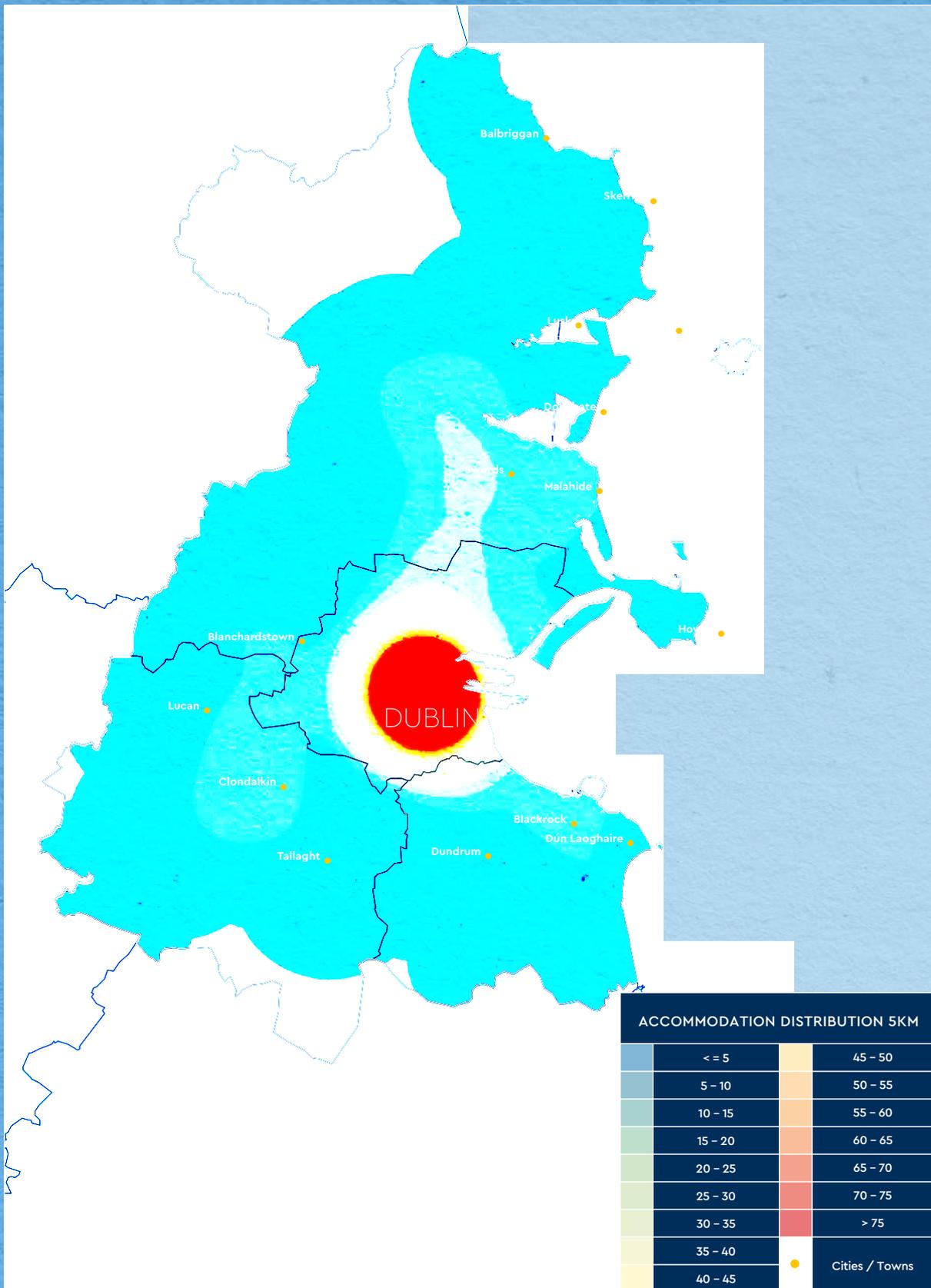
Guinness Gates, Crane Street, Dublin.

ACCOMMODATION CAPACITY – DUBLIN



Source: Mallon Technology.

ACCOMMODATION DISTRIBUTION – DUBLIN



Source: Mallon Technology.

'Housing for All' is the government's housing plan for Ireland to 2030 www.gov.ie/housingforall.

The new housing plan sets out that government will bring forward legislation on the revised regulatory controls requiring the registration of all tourist short-term and holiday lets accommodation with Fáilte Ireland under a 'STTL' Short Term Tourist Letting register from 2023.

At present Fáilte Ireland's statutory functions relate to the regulation of those types of tourist accommodation that are prescribed terms under the TTAs (Tourist Traffic Acts) such as "hotel" and "guesthouse". The new legislation will allow Fáilte Ireland to deal with all types of short-term tourist lettings irrespective of the description. This would cover accommodation such as individual rental units, accommodation units within residential properties, apart-hotels, glamping sites and other forms of alternative accommodation.

The Temporary Protection Directive (2001/55 EC) was activated by EU Council Decision EU 2022/382 of 4 March 2022, to provide immediate protection in EU countries for people displaced by the Russian invasion of Ukraine. The Government of Ireland as a member of the European Union has committed to playing its part and has contracted tourism accommodation to provide emergency accommodation.

In addition to this, applications for International Asylum have increased placing further pressure on tourism accommodation availability. While the objective is to place people in more suitable long term accommodation, this will take time to stabilise over the lifetime of this Regional Tourism Development Strategy, given the shortage of housing availability and ongoing population growth.

STRATEGIC FOCUS FOR OUR ACCOMMODATION STRATEGY – ADDRESSING OUR STRATEGIC OBJECTIVES

1	<p>STRATEGIC OBJECTIVE: INCREASE RESILIENCE BY OPTIMISING VISITOR MIX AND MAXIMIZING REVENUE BY INCREASING DWELL TIME AND RANGE OF ACTIVITIES ENGAGED IN</p>
STRATEGIC INITIATIVES	
<ol style="list-style-type: none"> 1. Conduct destination-based accommodation audit to scope additional accommodation (quantity and type) requirements. 2. Engage with local authorities and the County and City Management Association (CCMA) to support the growth of facilities for camper vans and 'Aires' in suitable and sustainable locations. 	

2	<p>STRATEGIC OBJECTIVE: RE-IGNITE BUSINESS TOURISM, POSITIONING DUBLIN AS A LEADER INTERNATIONALLY WITH A FOCUS ON SUSTAINABILITY</p>
STRATEGIC INITIATIVES	
<ol style="list-style-type: none"> 1. Conduct an international impact assessment to unlock post-pandemic insights on changing behaviour and attitudes, for both promotable and non-promotable business, to inform future programmes. 2. Develop a new Roadmap for Business Events to support survival, recovery and reboot. Conduct brand review. 	

3

STRATEGIC OBJECTIVE:

DEVELOP DIFFERENTIATING EXPERIENCES, PROVIDING DOMESTIC AND INTERNATIONAL TOURISTS WITH REASONS TO STAY LONGER

STRATEGIC INITIATIVES

1. Undertake an international study of accommodation by type, to inform the development of innovative options to address new market segments, including families and visitors looking to be active in nature.

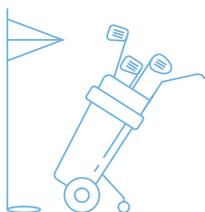
4

STRATEGIC OBJECTIVE:

BUILD A COMMITTED STAKEHOLDER AND INDUSTRY PARTNERSHIP TO DEVELOP DESTINATION DUBLIN, ENCOMPASSING THE WHOLE REGION AND LEVERAGING CITIZEN-CENTRIC AND VISITOR-CENTRIC INITIATIVES FOR MUTUAL BENEFIT WHILE REDUCING THE INDUSTRY'S CARBON FOOTPRINT AND ENSURING NET CONTRIBUTION TO THE PROTECTION OF OUR CULTURAL AND NATURAL HERITAGE

STRATEGIC INITIATIVES

1. Partner with local authorities to communicate social and economic contribution of tourism to citizens and the wider Irish economy.
2. Develop a bespoke programme to embed accommodation providers into the wider Destination Dublin initiatives with particular emphasis on further intensification of Fáilte Ireland's partnership with the hotel sector.
3. Build strong networks and clusters across the region, enabling cross promotion of the city as a whole.



3.5.3. ACCESSIBILITY

Accessibility is a central element of any responsible and sustainable development. It is a critical component of tourism development, enabling all people to participate in and enjoy tourism experiences. Improved accessibility to basic infrastructure and tourism amenities is essential in meeting the needs and requirements of all visitors to Dublin. This does not only equate to providing access to those with disabilities, but it also addresses the importance of creating universally designed environments to support people with physical needs, the increasing ageing population and those who have difficulty with mobility or access to information.

Implementing the principles of accessible tourism involves a collaborative process. Fáilte Ireland, working in partnership with public agencies, local authorities, NGOs and local stakeholders, will continue to use best practice in implementing the principles of universal design across all projects to ensure that all persons, regardless of their physical or cognitive needs, are able to use and enjoy all available amenities in an equitable and sustainable manner.

As projects are developed across the region, Fáilte Ireland will aspire to:

1. Develop and create accessible facilities, infrastructure and transport in order to create an environment that is varied, stimulating and easily accessible.
2. Work with Dublin Airport, the Dublin Port Company and other major access points to the region as appropriate on relevant initiatives.
3. Ensure tourism information, communications and all promotional resources used in tourism should include clear indications of accessible services and facilities.
4. Liaise with the tourism industry and our stakeholders, who play an important role in reducing potential deficiency in access, to support training in accessibility awareness and customer care to ensure the development and promotion of tourism for all.

5. Collaborate to increase the availability of adapted and accessible accommodation and tourism amenities and ensure booking services and websites are accessible for all.
6. Partner with Smart Dublin on initiatives to support accessibility goals for the wider city, that benefits tourists.

3.5.4. TRANSPORT

Air and Sea access

Air access to Dublin airport is crucial, not just for the city, but for the whole country. Similarly, sea access by ferry is critical to the self-drive market. We will support the route development ambitions of Ireland's air and seaports and Tourism Ireland, by providing them with the strongest possible destination and product experiences; and by working to ensure all industry partners are aware of and actively promote routes as part of their international marketing and sales activities.

It is critical that visitors feel welcomed at arrival and can easily access information to help them navigate their way through the airport, and to their onward journey. Initiatives undertaken by DAA as part of the Dublin orientation programme have made that visitor journey much more seamless, with numerous information points throughout the arrivals journey. Fáilte Ireland will continue to collaborate with partners to improve orientation and way-finding and ensure a warm welcome to overseas visitors arriving into the city by ensuring that regional branding and imagery are in situ giving a sense of arrival and a sense of place.

Public Transport & EV Charge Points Network

The vast majority (67%) of visitors on a city break to Dublin do not hire cars (Fáilte Ireland Survey of Overseas Travellers 2018), but rather use public transport (or indeed walk) to navigate around the city. It is therefore crucial that public transport is easily accessible to visitors, with clear information points and ticket-less options available. As we extend our product offering across the region, we aim to support the visitor in confidently navigating the city through appropriate way-finding and journey planning supports, particularly at key city transport hubs.

For those who chose to drive, the expansion of the electric vehicle charge point network is critical to ensure the visitor experience meets expectations in terms of both avoiding congestion at charge points and ensuring ease of access. The appropriate network of fast and slow charge points requires exponential development to meet visitor needs, sustainability goals and comply with reduction in combustion engine targets. In this regard, particular attention should be paid to identifying means of supporting the accommodation sector in installing charge points in their car parks, thereby facilitating visitors when they stop for a meal or overnight stay.

Coach Parking Facilities

There are several competing demands for the use of our roads real estate, making it more difficult for coaches to park up on-street in key locations around the city. It is important that we find sustainable solutions in terms of adequate coach parking facilities by working with local authorities, the NTA and industry practitioners to ensure adequate parking facilities are in place for the coach tourism sector.

STRATEGIC FOCUS FOR OUR TRANSPORT STRATEGY – ADDRESSING OUR STRATEGIC OBJECTIVES

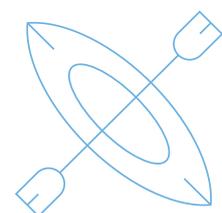
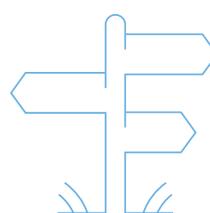
4

STRATEGIC OBJECTIVE:

BUILD A COMMITTED STAKEHOLDER AND INDUSTRY PARTNERSHIP TO DEVELOP DESTINATION DUBLIN, ENCOMPASSING THE WHOLE REGION AND LEVERAGING CITIZEN-CENTRIC AND VISITOR-CENTRIC INITIATIVES FOR MUTUAL BENEFIT WHILE REDUCING THE INDUSTRY’S CARBON FOOTPRINT AND ENSURING NET CONTRIBUTION TO THE PROTECTION OF OUR CULTURAL AND NATURAL HERITAGE

STRATEGIC INITIATIVES

1. Support the development of next generation ticketing on public transport to make it as accessible for visitors as possible.
2. Develop welcome strategy at Dublin airport, in partnership with DAA and NTA.
3. Work with local authorities and NTA to deliver transport solutions at strategic locations to improve accessibility to tourism experiences.
4. Support initiatives to promote the 15-minute city, making it easier for visitors to traverse the city by foot, bike or public transport.



3.6. PRODUCT DEVELOPMENT STRATEGY

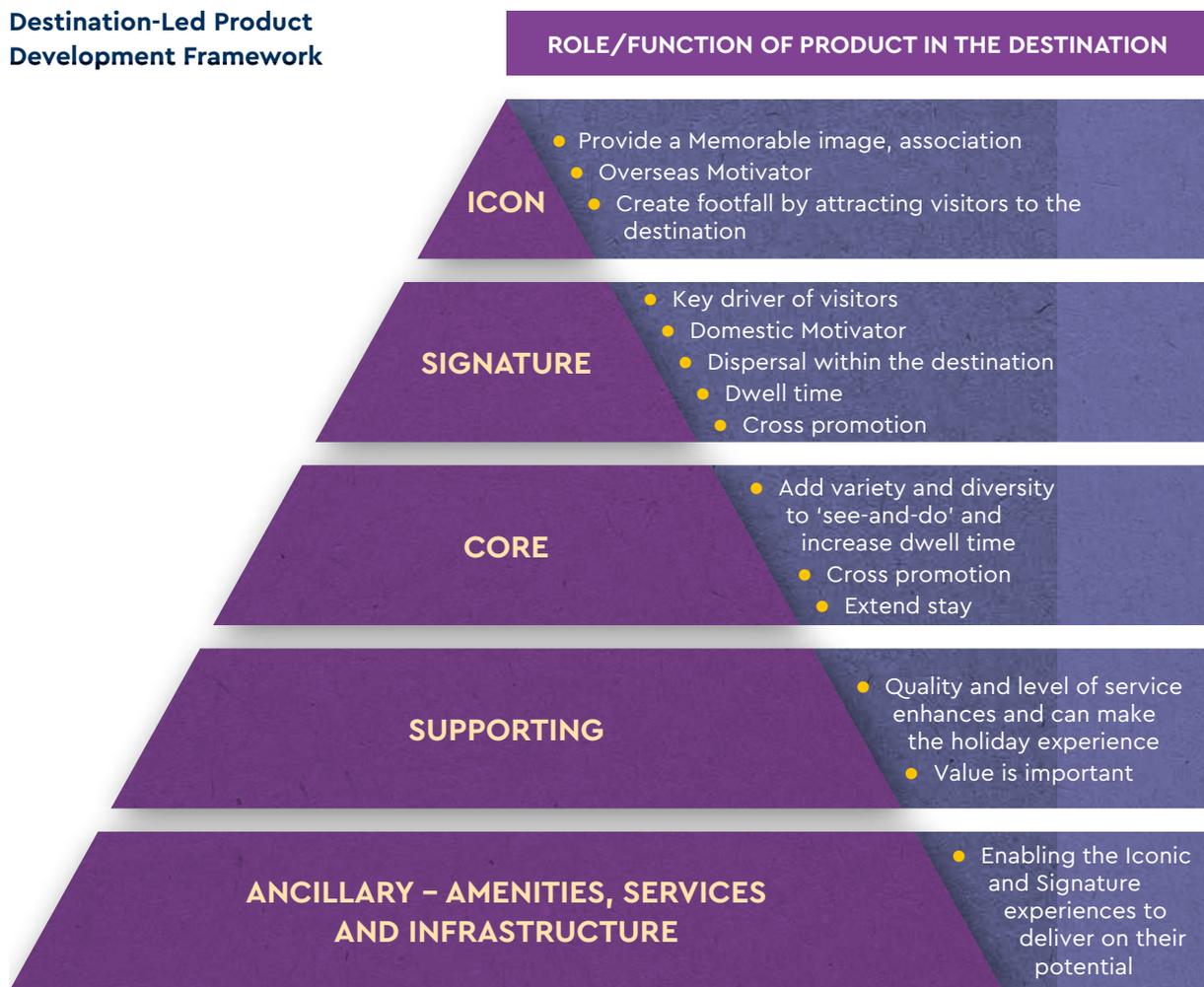
RATIONALE

A 'destination-led product development' approach is central to achieving the objectives of this Regional Tourism Development Strategy.

It will enable the DEDPs leverage the full benefit of product development and ensure a consistent and coherent approach across all plans and with all stakeholders.

A Product Development Framework has been developed facilitating the categorisation of product within a destination and the analysis of the function and role these play. When this is aligned with the Destination Development Framework it will ensure appropriate product development will be undertaken to meet the needs of that destination and will be guided by the destination maturity levels associated with the region.

Destination-Led Product Development Framework



Source: Fáilte Ireland.

Dublin is home to world class visitor attractions and experiences, both free and fee paying. The range of things to see and do is varied. It caters

for lots of tastes and interests, from iconic, world-renowned attractions and festivals that motivate visitors to choose Dublin, to smaller "hidden gems"

and unexpected attractions and experiences. Smaller activity providers, who by their nature tend to be more seasonal operations and are usually located closer to the mountains and the bay, are also available. Dublin is also known for its cultural and literary heritage and many of the national cultural institutions are located in the city. Research tells us that domestic visitors, including people who identify Dublin as their home, do not have a full awareness of the region's offering and it is not clear how the current product offering in general compares with other capital cities, all of which are competing for international visitors.

Given that there are currently distinct differences in terms of destination maturity levels across the region, product development will be considered across these distinct areas as follows:

DUBLIN CITY

- Work with partners to maximise the potential for place-making within the city, including public realm enhancements.
- Optimise visitor experience across iconic attractions, focusing on strong visitor management plans and enhanced interpretation, including foreign language provision.
- Support this by developing enhanced product offerings for smaller attractions, informed by insight that provide animation in the city and encourage longer stays.
- Continue to focus on the city as a business tourism destination.
- Focus on hero and support festivals to drive visitation and animation of the city.
- Assist visitors to experience the city through the implementation of trails and way-finding, that are accessible in their own language.

DUBLIN COAST

- Raise the profile of the coastal offering, particularly to international markets, creating awareness of existing product offerings to drive additional visitor numbers and ultimately stimulate longer stays for city breaks.
- Enhance existing attractions clusters, and focus on developing new attractors that will further differentiate the coastal villages.
- Focus on linking the coast via the Dublin Coastal Trail, or the new cycleways that extend across the coastline.

DUBLIN MOUNTAINS

- Work with partners to support the sustainable development of the Dublin Mountains as a new destination within the region
- Influence visitor flows by linking this offering to the coast via access routes from DLR locations, and also cross region through integration with the Wicklow mountains DEDP

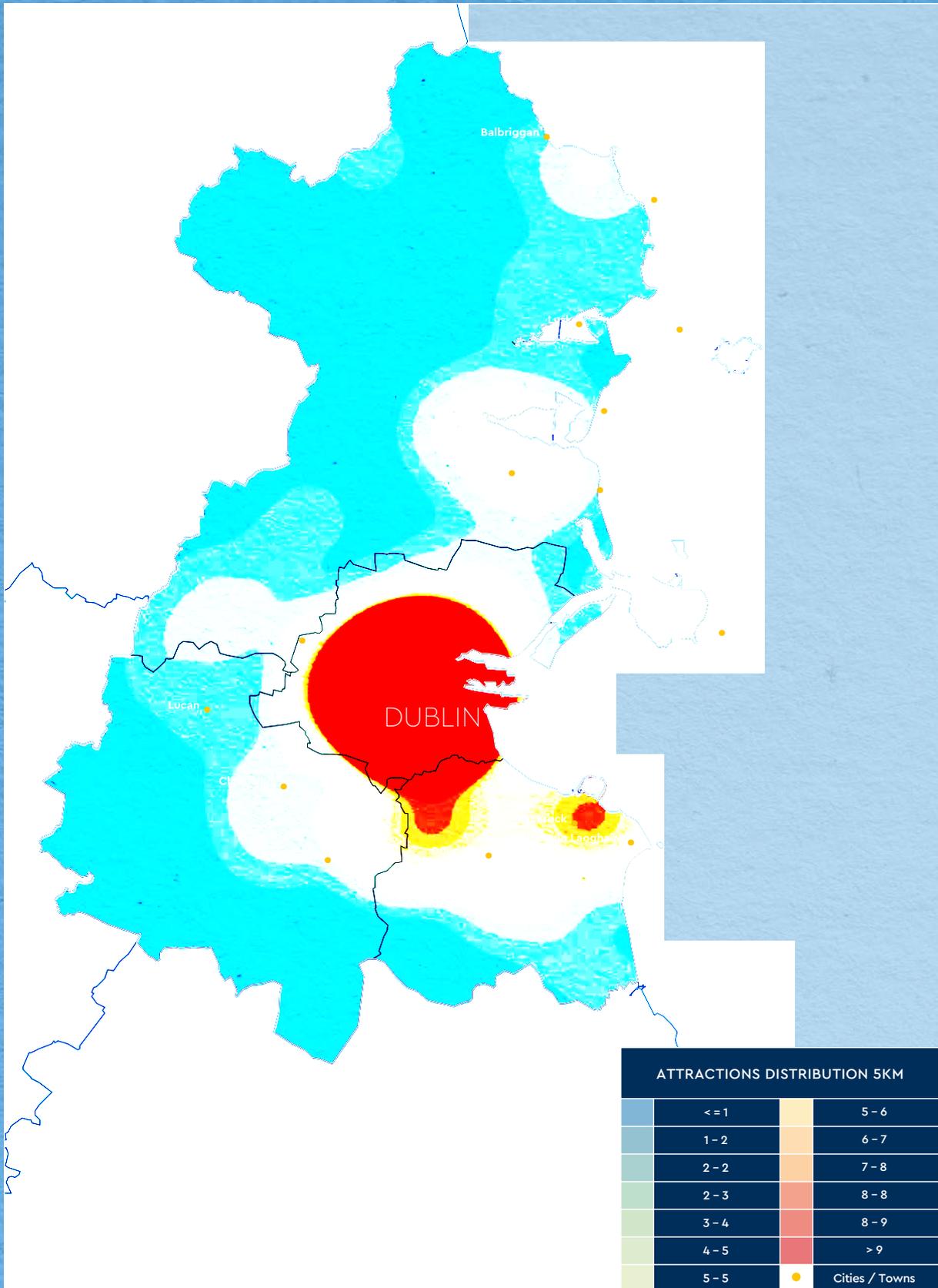
To ensure that all trail development is undertaken in a sustainable manner, Fáilte Ireland in conjunction with relevant partners will prepare, early in 2023, a guidance document on the protection of the natural heritage in planning, constructing, maintaining and managing recreational trails in Ireland.

In respect of all tourism development projects, we will ensure that all potential impacts on biodiversity and ecosystem services will be avoided or minimised. For example, we will ensure that impacts on bats and other wildlife will be avoided or minimised by choosing appropriate light fittings in both urban and rural settings.

In essence the high-level product development strategy for Dublin can be articulated as follows:

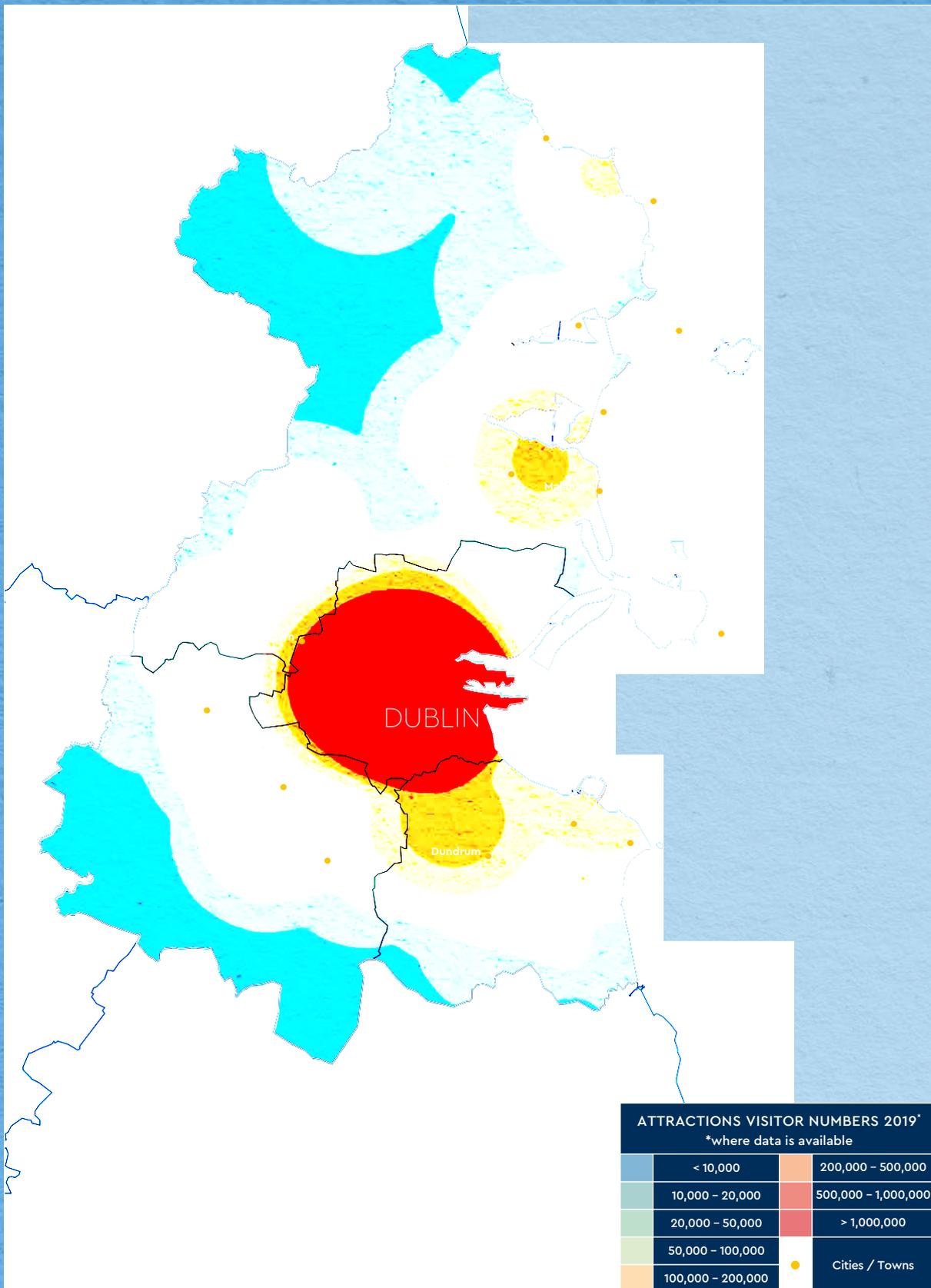
Enhance iconic and hero offerings in the city centre, to optimise visitor experience, whilst targeting investment and business supports into the coast and mountains to augment the product offering, differentiating the overall city proposition.

ATTRACTIONS DISTRIBUTION – DUBLIN



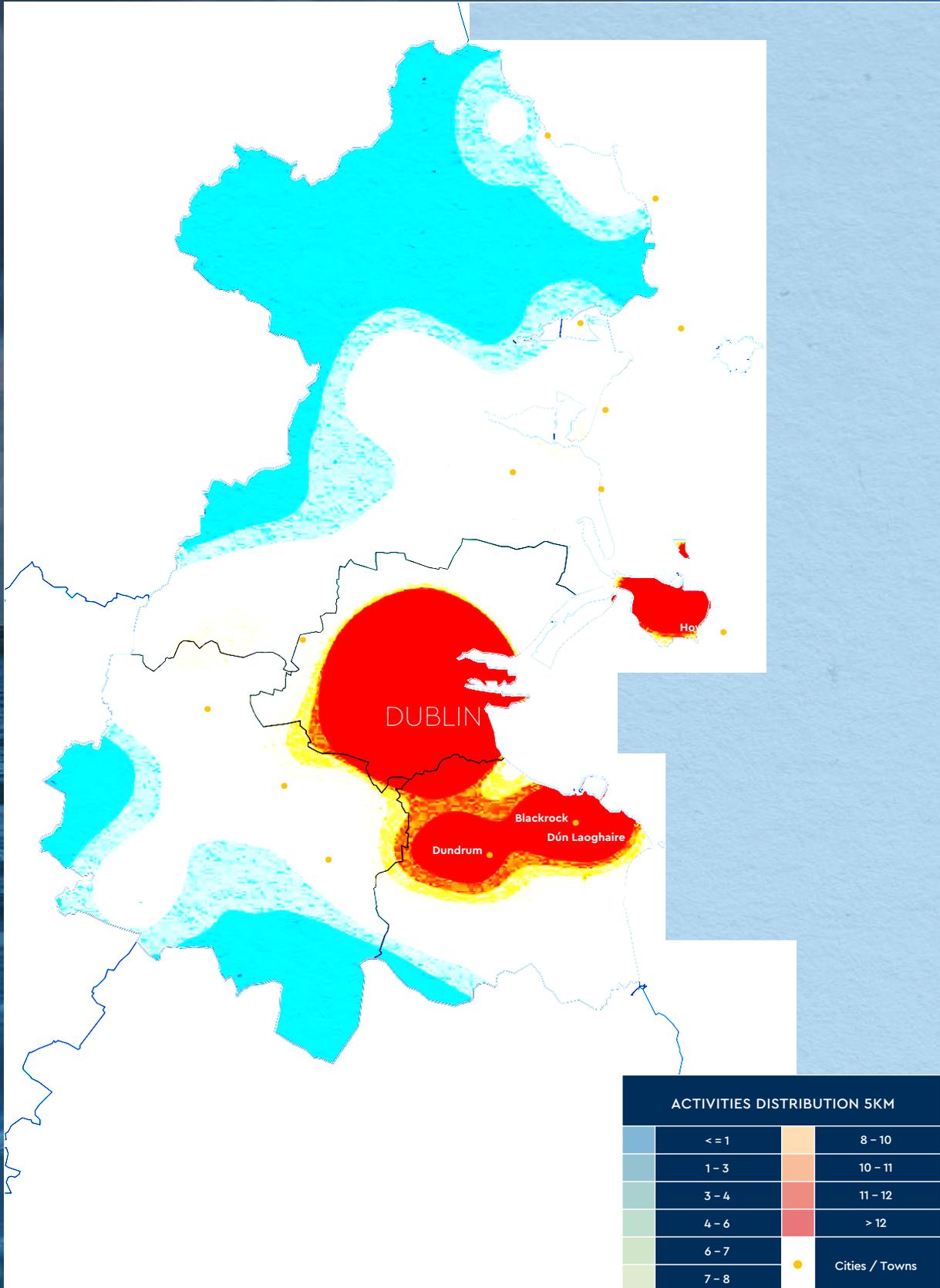
Source: Mallon Technology.

ATTRACTIONS VISITOR NUMBERS 2019 – DUBLIN



Source: Mallon Technology.

ACTIVITIES DISTRIBUTION - DUBLIN



Source: Mallon Technology.

FUNDING FUTURE DEVELOPMENTS

Significant capital investment will be required in the next 10 years to deliver the brand vision for the region. Fáilte Ireland will work in partnership with key stakeholders including local authorities and cultural institutions to leverage capital investment from other government funding schemes such as URDF/RRDF, NTP, Project Ireland 2040 and sustainable transportive initiatives to deliver these projects. Delivery of this strategy is dependent on the availability of the capital funding from a range of sources.

STRATEGIC PARTNERSHIPS

Fáilte Ireland has established strategic partnerships with state bodies that have a key role to play in tourism – Coillte, NPWS, OPW and the Department of Housing, Local Government & Heritage and Waterways Ireland. It is the intention of Fáilte Ireland to seek a second partnership with each partner when the current partnership agreements end. In partnership, we will use the Destination-led Product Development Framework to select future projects which support the region's brand proposition and individual destination objectives, with the agreement of all partners.

STRATEGIC FOCUS FOR PRODUCT DEVELOPMENT – ADDRESSING OUR STRATEGIC OBJECTIVES

1

STRATEGIC OBJECTIVE:

INCREASE RESILIENCE BY OPTIMISING VISITOR MIX AND MAXIMIZING REVENUE BY INCREASING DWELL TIME AND RANGE OF ACTIVITIES ENGAGED IN

STRATEGIC INITIATIVES

1. Develop the outdoor proposition for Dublin, enabling opportunity for visitors to be active in nature.
 - Canal greenways
 - SDCC activity quarter
 - Coastal walks/trails/cycleways

2

STRATEGIC OBJECTIVE:

RE-IGNITE BUSINESS TOURISM, POSITIONING DUBLIN AS A LEADER INTERNATIONALLY WITH A FOCUS ON SUSTAINABILITY

STRATEGIC INITIATIVES

1. Deliver gala dinner venue funding scheme.

3

STRATEGIC OBJECTIVE:

DEVELOP DIFFERENTIATING EXPERIENCES, PROVIDING DOMESTIC AND INTERNATIONAL TOURISTS WITH REASONS TO STAY LONGER

STRATEGIC INITIATIVES

1. Deliver all existing capital projects in the pipeline over the next 5 years.
 - a. Dublin Castle
 - b. Casino at Marino
 - c. TCD Library/Book of Kells
 - d. Little Museum of Dublin
2. Commission and implement a comparative audit, assessing Dublin's product offering versus key competitive markets to inform gaps & opportunities for future development.
3. Develop and implement an "access to water" strategy to include the Liffey, the bay and the canals.
4. Develop the Dublin Mountains offering, leveraging the Wicklow Way walking trail, in partnership with Ireland's Ancient East team.
5. Develop a programme to allow visitors to access existing tourism products and amenities in different ways, focusing on outdoor experiences and the development of winter-based experiences for a city winter offering.

4

STRATEGIC OBJECTIVE:

BUILD A COMMITTED STAKEHOLDER AND INDUSTRY PARTNERSHIP TO DEVELOP DESTINATION DUBLIN, ENCOMPASSING THE WHOLE REGION AND LEVERAGING CITIZEN-CENTRIC AND VISITOR-CENTRIC INITIATIVES FOR MUTUAL BENEFIT WHILE REDUCING THE INDUSTRY'S CARBON FOOTPRINT AND ENSURING NET CONTRIBUTION TO THE PROTECTION OF OUR CULTURAL AND NATURAL HERITAGE

STRATEGIC INITIATIVES

1. Partner with local authorities on capital investment and prioritise projects that have significant tourism impact identified as part of these and other strategic partnerships.
2. Deliver Fáilte Ireland schemes including Destination Towns, Outdoor Dining and Urban Animation, in partnership with local authorities.
3. Develop a city trail to link together key tourism offerings and experiences across the city, enabling the visitor to navigate their way seamlessly, uncovering both iconic sites and hidden gems.
4. Harness key public and private sector investments in developing new quarters to ensure tourism potential is unlocked in a sustainable way, marrying the needs of both citizen and visitor.

3.6.1. FESTIVALS AND EVENTS STRATEGY

RATIONALE

Our strategic vision for festivals is to focus on developing festivals and events that are of impact and scale and increase both dwell time and economic impact. Festivals and events are key motivators for local, domestic and international consumers, with the potential to motivate visitors at off-peak times of the year.

We will continue to work with strategic festivals with offerings unique to Dublin to enable them build stronger networks of their own through targeted domestic and international support. By raising awareness of these festivals, Dublin will become synonymous with its own unique portfolio of festivals. We will focus on building the Winter in Dublin proposition to motivate people to visit in the shoulder season. Festivals also

play a significant role in animating destinations. Whilst smaller festivals may not be the single reason why visitors travel to a location, they can be a significant contributor to their enjoyment of their holiday experience as they create vibrancy and 'something to do' as part of their stay.

In addition to working with festival and events providers, we will also work with stakeholders who have specific local food and crafts offerings. From research, we know the importance of food to the overall proposition for Dublin. Our ambition is to create awareness of our food offerings, across the city and county, as a proof point of the vibrancy of the city offering and in the coastal villages where it is a core part of the visitor experience.

STRATEGIC FOCUS FOR FESTIVALS AND EVENTS – ADDRESSING OUR STRATEGIC OBJECTIVES

3

STRATEGIC OBJECTIVE:

DEVELOP DIFFERENTIATING EXPERIENCES, PROVIDING DOMESTIC AND INTERNATIONAL TOURISTS WITH REASONS TO STAY LONGER

STRATEGIC INITIATIVES

1. Further develop and activate Winter in Dublin as a key driver to increase dwell time and economic impact.
2. Conduct feasibility to determine options to activate restaurants and hotels as part of Winter in Dublin.
3. Activate iconic and hero festivals and festivals with potential to drive overseas visitors to optimise the opportunity for Dublin (St Patrick's Festival; NYF, TradFest).
4. Optimise Aer Lingus College Football Classic series.
5. Work with local authorities and Department of Culture and Arts to develop a strategy for smaller festivals that animate the region, particularly to drive footfall in the shoulder season.
6. Develop the Dublin Coastal Trail food networks.

4

STRATEGIC OBJECTIVE:

BUILD A COMMITTED STAKEHOLDER AND INDUSTRY PARTNERSHIP TO DEVELOP DESTINATION DUBLIN, ENCOMPASSING THE WHOLE REGION AND LEVERAGING CITIZEN-CENTRIC AND VISITOR-CENTRIC INITIATIVES FOR MUTUAL BENEFIT WHILE REDUCING THE INDUSTRY'S CARBON FOOTPRINT AND ENSURING NET CONTRIBUTION TO THE PROTECTION OF OUR CULTURAL AND NATURAL HERITAGE

STRATEGIC INITIATIVES

1. Harness existing events/festivals and align with stakeholders to create a calendar of leisure festivals, business events and occasions that are city-wide.

3.6.2. NIGHT-TIME ECONOMY

RATIONALE

While the food and drink offering in Dublin at night is a core attractor for many international visitors, developing a nighttime economy with broad appeal will be key to ongoing success.

A seamless transition from daytime to nighttime with a variety of offerings available that appeals across multiple demographics will be important.

STRATEGIC FOCUS FOR OUR NIGHT-TIME ECONOMY STRATEGY – ADDRESSING OUR STRATEGIC OBJECTIVES

1

STRATEGIC OBJECTIVE:

INCREASE RESILIENCE BY OPTIMISING VISITOR MIX AND MAXIMIZING REVENUE BY INCREASING DWELL TIME AND RANGE OF ACTIVITIES ENGAGED IN

STRATEGIC INITIATIVES

1. Increase resilience by optimising visitor mix and maximizing revenue by increasing dwell time and range of activities engaged in.

2

STRATEGIC OBJECTIVE:

RE-IGNITE BUSINESS TOURISM, POSITIONING DUBLIN AS A LEADER INTERNATIONALLY WITH A FOCUS ON SUSTAINABILITY

STRATEGIC INITIATIVES

1. Review and develop a range of nighttime events and experiences to support the objectives of the nighttime economy group.

3

STRATEGIC OBJECTIVE:

DEVELOP DIFFERENTIATING EXPERIENCES, PROVIDING DOMESTIC AND INTERNATIONAL TOURISTS WITH REASONS TO STAY LONGER

STRATEGIC INITIATIVES

1. Work with industry and key stakeholders to evolve and develop a variety of sustainable offerings to create compelling reasons to visit the city or for those living locally to come into the city centre.

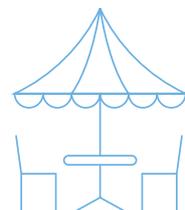
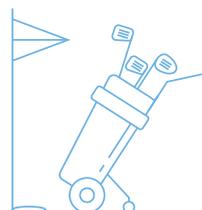
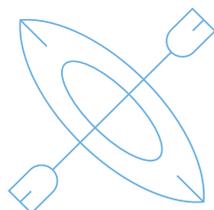
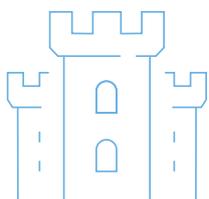
4

STRATEGIC OBJECTIVE:

BUILD A COMMITTED STAKEHOLDER AND INDUSTRY PARTNERSHIP TO DEVELOP DESTINATION DUBLIN, ENCOMPASSING THE WHOLE REGION AND LEVERAGING CITIZEN-CENTRIC AND VISITOR-CENTRIC INITIATIVES FOR MUTUAL BENEFIT WHILE REDUCING THE INDUSTRY'S CARBON FOOTPRINT AND ENSURING NET CONTRIBUTION TO THE PROTECTION OF OUR CULTURAL AND NATURAL HERITAGE

STRATEGIC INITIATIVES

1. Ensure the voice of the visitor is represented in industry and stakeholder groups tasked with the implementation of the government's nighttime economy task-force report.



All applications for funding under this Strategy must demonstrate compliance with its environmental measures, including the 'Environmental Management for Local Authorities and Others' at Appendix A4.

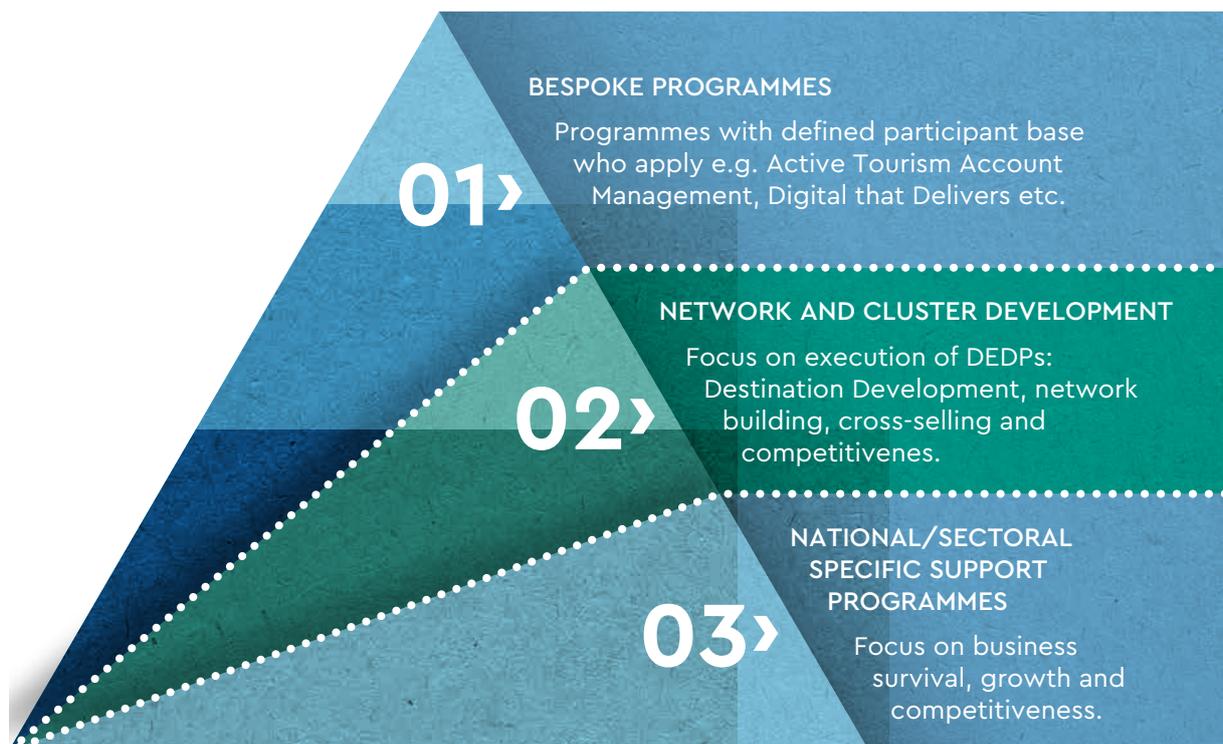
3.7. INDUSTRY DEVELOPMENT STRATEGY

RATIONALE

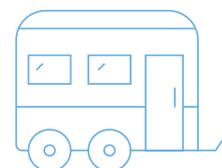
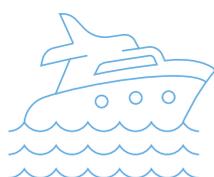
As we navigate our way through recovery and return to growth, harnessing the idea of Destination Dublin as a shared vision and positioning for the entire city offering will be key. There is a requirement for collaboration at a destination level across the city and county to deliver on the agreed outputs of the consolidated plan for Dublin. We must ensure our tourism industry partners are primed to deliver these outputs with the requisite supports in place to make this happen. We must also continue to

ensure that the visitor experience is consistently excellent, by particularly focusing on business mix, channel mix and demand/revenue generation.

Recognising the challenges facing the industry, we will deliver supports in several ways that include labour shortages, Account Management and a range of National Support Programmes. In particular, we will assist the industry in meeting its carbon reduction targets set out in the carbon budget.



Source: Fáilte Ireland.



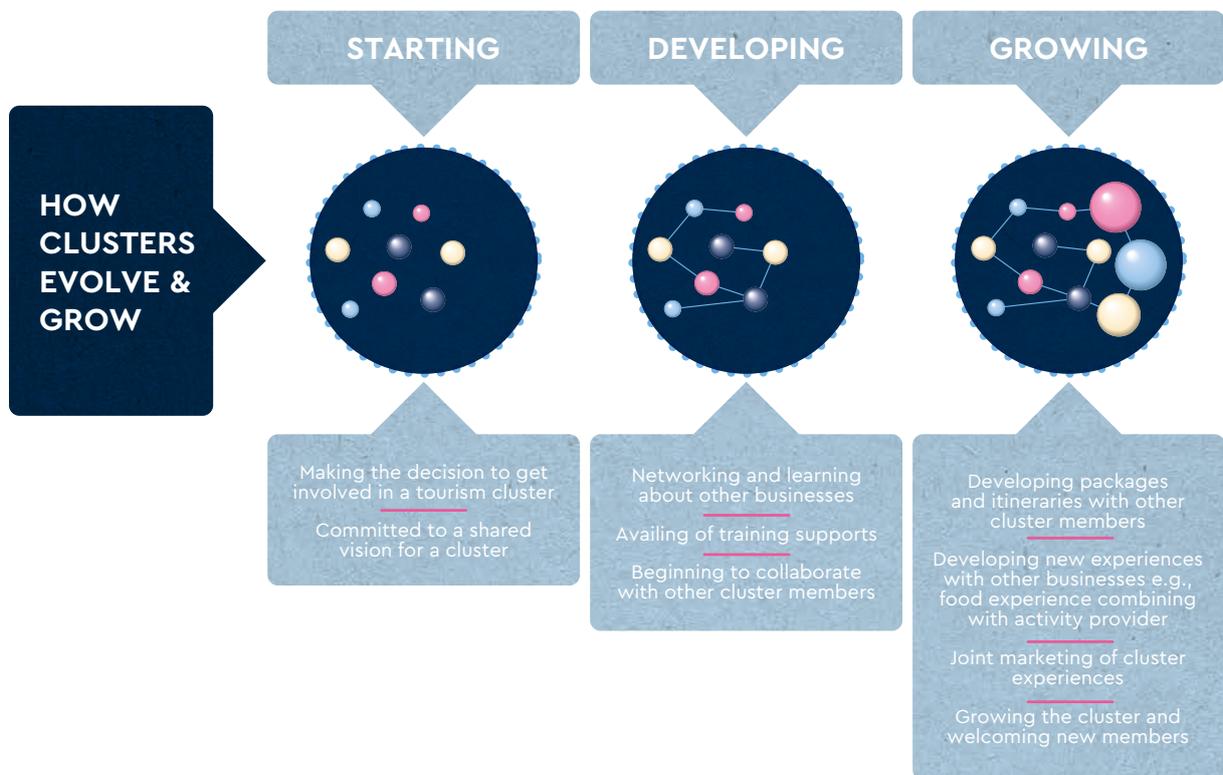
Our core focus will be concentrated on the following;

ACCOUNT MANAGEMENT –

The Dublin regional team engages with industry on a regular basis through the account management process to provide a streamlined and supportive two-way communication and engagement structure.

NETWORK AND CLUSTER DEVELOPMENT –

The agreed development goals of the destinations, as outlined in the DEDPs or other plans, will be achieved through a Cluster Development Programme Framework. It will be based on programme creation relative to the destination maturity level.



Source: Repucon Consulting.

NATIONAL SUPPORT PROGRAMMES –

Fáilte Ireland will continue to deliver national and sectoral specific programmes based on the prioritised needs identified through engagement with industry and the needs of destinations.

STRATEGIC FOCUS FOR INDUSTRY DEVELOPMENT – ADDRESSING OUR STRATEGIC OBJECTIVES

<h1>1</h1>	<p>STRATEGIC OBJECTIVE: INCREASE RESILIENCE BY OPTIMISING VISITOR MIX AND MAXIMIZING REVENUE BY INCREASING DWELL TIME AND RANGE OF ACTIVITIES ENGAGED IN</p>
<p>STRATEGIC INITIATIVES</p>	
<p>2. Identify key growth and revenue/yield generator priorities driven from industry at a sectoral and geographical level to support through a Tourism Account Management programme with short, medium and long-term goals for the business.</p>	
<p>3. Support industry in optimising commercial performance, particularly for capital investment.</p>	
<h1>2</h1>	<p>STRATEGIC OBJECTIVE: RE-IGNITE BUSINESS TOURISM, POSITIONING DUBLIN AS A LEADER INTERNATIONALLY WITH A FOCUS ON SUSTAINABILITY</p>
<p>STRATEGIC INITIATIVES</p>	
<p>1. Support industry in skills development, training and performance optimization.</p>	
<p>2. Support industry in optimizing commercial performance to maximize conversions.</p>	
<p>3. Develop new saleable experiences – incentive ready programme.</p>	
<h1>3</h1>	<p>STRATEGIC OBJECTIVE: DEVELOP DIFFERENTIATING EXPERIENCES, PROVIDING DOMESTIC AND INTERNATIONAL TOURISTS WITH REASONS TO STAY LONGER</p>
<p>STRATEGIC INITIATIVES</p>	
<p>1. Collaborate directly with National Cultural Institutions to offer a bespoke programme that is tailored to their needs and aligned with Dublin's requirement for diversification and innovation in our cultural spaces.</p>	
<h1>4</h1>	<p>STRATEGIC OBJECTIVE: BUILD A COMMITTED STAKEHOLDER AND INDUSTRY PARTNERSHIP TO DEVELOP DESTINATION DUBLIN, ENCOMPASSING THE WHOLE REGION AND LEVERAGING CITIZEN-CENTRIC AND VISITOR-CENTRIC INITIATIVES FOR MUTUAL BENEFIT WHILE REDUCING THE INDUSTRY'S CARBON FOOTPRINT AND ENSURING NET CONTRIBUTION TO THE PROTECTION OF OUR CULTURAL AND NATURAL HERITAGE</p>
<p>STRATEGIC INITIATIVES</p>	
<p>1. Deliver a modular programme for clusters, informed by destination maturity, to support destination development plans.</p>	
<p>2. Develop and drive brand adoption across the city and wider region with a strong collaboration from the industry.</p>	
<p>3. Work with a number of other State Agencies, such as SEAI, and industry groups to support the industry in reaching its carbon reduction targets. We will also support the uptake of sustainability measurement and certification programmes at both enterprise and destination levels.</p>	

3.8. DISTRIBUTION AND BUSINESS DEVELOPMENT STRATEGY

RATIONALE

Understanding channel mix and the key drivers of conversion is paramount and we will support industry in determining the optimum mix for their specific business.

Distribution plans will be prepared for each DEDP over the next five years in accordance with destination level of maturity. The Dublin team will partner with businesses and the Fáilte Ireland commercial development team to shape products for different distribution channels and build sales and contracting skills in advance of

engaging buyers. The national cultural institutions will play an increasingly important role in both positively positioning our internationally renowned cultural heritage, but also in providing value for money if they are programmed into a wider city itinerary. As new DEDPs come on stream, we will continue to develop saleable experiences based on core markets and ensure that Dublin continues to surprise and delight with the wide range of offerings, tailored to specific markets.



Source: Fáilte Ireland.

At enterprise level, the maturity will also be indexed based on saleable experiences. Some key businesses are already very active in overseas markets. We will work closely with these businesses to help grow their market

share. The distribution plans will support a shift in the current (2019) distribution map to partner with other DEDPs to create new itineraries and incremental visitor flows that change the way visitors are consuming the region and country.

Digital that Delivers Programme

Fáilte Ireland will work to support tourism businesses to enhance their digital presence and capability through its Digital That Delivers programme. The initial focus will be on the attractions, activities and tours businesses, as research has indicated this is where the greatest opportunity lies in the short-term. From there, we will work to support other sectors of the industry subject to the required funding being made available by Government.

The programme will provide businesses with technical and practical support to drive operational efficiencies through new technologies. It will educate participants in how to distribute products via third party channels such as online travel agents (OTAs), aggregators and tour operators. It will also allow them to enhance their own websites and digital marketing content, while also optimising their digital channel performance.

STRATEGIC FOCUS FOR DISTRIBUTION AND BUSINESS DEVELOPMENT – ADDRESSING OUR STRATEGIC OBJECTIVES

1	<p>STRATEGIC OBJECTIVE: INCREASE RESILIENCE BY OPTIMISING VISITOR MIX AND MAXIMIZING REVENUE BY INCREASING DWELL TIME AND RANGE OF ACTIVITIES ENGAGED IN</p>
STRATEGIC INITIATIVES	
<p>1. Undertake qualitative and quantitative studies of international buyers to assess Dublin's offering versus international competitor offerings to identify gaps and opportunities.</p>	
<p>2. Conduct an audit of industry currently active with overseas buyers and assess the offering based on insights and market trends to determine opportunities for new business.</p>	
<p>3. Support and partner with businesses already active in overseas markets to grow their market share.</p>	
<p>4. Roll out the Digital That Delivers programme to ensure all participating businesses enhance their current digital capability to drive business growth.</p>	
2	<p>STRATEGIC OBJECTIVE: RE-IGNITE BUSINESS TOURISM, POSITIONING DUBLIN AS A LEADER INTERNATIONALLY WITH A FOCUS ON SUSTAINABILITY</p>
STRATEGIC INITIATIVES	
<p>1. Continue to support business tourism through a programme of bespoke supports to optimise conversion.</p>	
3	<p>STRATEGIC OBJECTIVE: DEVELOP DIFFERENTIATING EXPERIENCES, PROVIDING DOMESTIC AND INTERNATIONAL TOURISTS WITH REASONS TO STAY LONGER</p>
STRATEGIC INITIATIVES	
<p>1. Develop and promote new offerings in luxury and golf.</p>	
<p>2. Prepare a distribution plan for each DEDP.</p>	

3.9. MARKETING STRATEGY

Marketing Mechanisms

The Dublin marketing programming and communications activity will be executed through the following mechanisms:

1. **External Marketing** – Sustained demand generation activity growing our domestic leisure tourism base through innovative regional brand and destination marketing programming.
2. **Internal Marketing** – Develop the profile of the Dublin brand among the tourism industry through continuous engagement at an individual level and through DEDP development clusters.
3. **Alliance Marketing** – Develop a level of marketing scale through strategic marketing alliances with our broader tourism network including tourism industry, local authorities, state bodies and national partnerships and sponsorships.
4. **Influencer Marketing** – Ensure sustained communications with all key tourism influencers including ITOA members, travel media, online influencers, leisure tourism specialists.

5. **Digital Marketing** – Embrace digital as the basis for destination marketing innovation and brand development.
6. **International Marketing** – Increase the levels of international engagement with the brand through strong collaboration with Tourism Ireland.

From a marketing perspective, the focus domestically will be to re-imagine Dublin through compelling communications that resonate with the domestic visitor to drive consideration and intent. This brand positioning messaging will be supported by more tactical campaigns to drive conversion and position Dublin as a must-do city break for the domestic market. The flywheel outlines our communications approach.



Source: Fáilte Ireland.

STRATEGIC FOCUS FOR DOMESTIC MARKETING – ADDRESSING OUR STRATEGIC OBJECTIVES

<h1>1</h1>	<p>STRATEGIC OBJECTIVE: INCREASE RESILIENCE BY OPTIMISING VISITOR MIX AND MAXIMIZING REVENUE BY INCREASING DWELL TIME AND RANGE OF ACTIVITIES ENGAGED IN</p>
<p>STRATEGIC INITIATIVES</p>	
<p>1. Re-imagine Dublin as a city break destination for domestic audiences.</p>	
<p>2. Activate and promote existing festivals and events of scale, whilst developing a roadmap of "occasions" to create reasons to visit.</p>	
<p>3. Develop bespoke programmes to focus on core segments, as identified through segmentation projects (both national and international).</p>	
<p>4. Determine overall value of day trips (from within Dublin and surrounding counties) to promote them as a lever to drive footfall throughout the year, with a particular focus on the shoulder season.</p>	
<h1>2</h1>	<p>STRATEGIC OBJECTIVE: RE-IGNITE BUSINESS TOURISM, POSITIONING DUBLIN AS A LEADER INTERNATIONALLY WITH A FOCUS ON SUSTAINABILITY</p>
<p>STRATEGIC INITIATIVES</p>	
<p>1. Build capability to target Ireland based influencers who can help attract their future international conference or corporate meeting and events.</p>	
<h1>3</h1>	<p>STRATEGIC OBJECTIVE: DEVELOP DIFFERENTIATING EXPERIENCES, PROVIDING DOMESTIC AND INTERNATIONAL TOURISTS WITH REASONS TO STAY LONGER</p>
<p>STRATEGIC INITIATIVES</p>	
<p>1. Focus on unlocking the "surprising" element of the Dublin experience, providing accessible supports for industry and tourists alike to discover unexpected parts of the city.</p>	
<p>2. Continue to develop new content and assets to support domestic marketing initiatives, including the creation and promotion of trails/itineraries that showcase all parts of the region.</p>	
<h1>4</h1>	<p>STRATEGIC OBJECTIVE: BUILD A COMMITTED STAKEHOLDER AND INDUSTRY PARTNERSHIP TO DEVELOP DESTINATION DUBLIN, ENCOMPASSING THE WHOLE REGION AND LEVERAGING CITIZEN-CENTRIC AND VISITOR-CENTRIC INITIATIVES FOR MUTUAL BENEFIT WHILE REDUCING THE INDUSTRY'S CARBON FOOTPRINT AND ENSURING NET CONTRIBUTION TO THE PROTECTION OF OUR CULTURAL AND NATURAL HERITAGE</p>
<p>STRATEGIC INITIATIVES</p>	
<p>1. Develop tool-kits and activation plans for programmes that enable industry partners maximise the marketing opportunity.</p>	

OVERSEAS MARKETING

Through the Brand Collaboration Group, Fáilte Ireland will partner with colleagues in Tourism Ireland to ensure they have a steady flow of 'new news' to help support their overseas markets-

based consumer marketing activities. Both agencies will also pool Dublin destination and product content to support Irish industry in its own marketing and sales development efforts.

1

STRATEGIC OBJECTIVE:

INCREASE RESILIENCE BY OPTIMISING VISITOR MIX AND MAXIMIZING REVENUE BY INCREASING DWELL TIME AND RANGE OF ACTIVITIES ENGAGED IN

STRATEGIC INITIATIVES

1. Input into the international segmentation project to identify the bullseye international target market.
2. Continue to partner with Tourism Ireland to promote Dublin internationally to drive increased overseas revenue.

4

STRATEGIC OBJECTIVE:

BUILD A COMMITTED STAKEHOLDER AND INDUSTRY PARTNERSHIP TO DEVELOP DESTINATION DUBLIN, ENCOMPASSING THE WHOLE REGION AND LEVERAGING CITIZEN-CENTRIC AND VISITOR-CENTRIC INITIATIVES FOR MUTUAL BENEFIT WHILE REDUCING THE INDUSTRY'S CARBON FOOTPRINT AND ENSURING NET CONTRIBUTION TO THE PROTECTION OF OUR CULTURAL AND NATURAL HERITAGE

STRATEGIC INITIATIVES

1. Partner with Tourism Ireland to positively position Dublin as a must-visit city break throughout the year, with a particular focus on the shoulder/winter periods.

3.10. COMMUNITY ENGAGEMENT

RATIONALE

Dubliners are at the heart of the visitor experience, as they provide the authentic experience of the city. It is paramount that the community is part of all plans to develop tourism within the city and that their voices and contributions form part of any visitor offering, particularly when developing the character mapping for the city centre.

Citizens should see the economic and social benefits of tourism to local communities, and any infrastructural improvements and resulting jobs created or sustained through tourism spend should be tracked and widely communicated. Tourism should be a positive and regenerating force in Dublin, contributing to the creation of

flourishing places and thriving communities.

Tourism Approval Rating

Each year, Fáilte Ireland undertakes a national survey to gauge the level of public support towards domestic and overseas tourism among local communities throughout every county in Ireland. The Tourism Approval Rating (TAR) is calculated through this survey. Public support for tourism in Ireland has reduced in the 12 months up to June 2021 compared with the previous year (July 2019 – June 2020), demonstrating the negative impact COVID-19 has had on residents' attitudes. However, Ireland's Tourism Approval Rating (TAR)

score remains positive, with Irish residents either approving of or accepting tourism and is scoring significantly above New Zealand and Australia.

Most Irish residents continue to agree that they personally benefit from tourism. While some believe they have experienced some adverse impact from tourism activity in their local area, most believe that enough action has been taken to address those issues. Fáilte Ireland will continue to monitor public support for tourism in Dublin over the course of this Strategy.

Community Tourism Enterprises

In 2019, research was commissioned by Fáilte Ireland into the nature and socio-economic impacts of community-based tourism across a number of regions. Where they exist in Dublin, community-based tourism enterprises by

their nature, provide the visitor with direct engagement with local people and their culture.

However, the research revealed that the challenges facing the sector include a lack of strategic planning and business management, access to capital and operational funding, rising insurance costs, a need for succession planning and a lack of capacity for commercialisation of opportunities.

Enhanced capacity building and activation for improved market accessibility will help to build a vibrant regional destination by strengthening authentic community experiences. By providing easy access for visitors to meet local people, hear stories and interact with nature, cultural heritage and outdoor activities, the overall brand proposition for Dublin will be significantly strengthened.

STRATEGIC FOCUS FOR COMMUNITY ENGAGEMENT – ADDRESSING OUR STRATEGIC OBJECTIVES

3

STRATEGIC OBJECTIVE:

DEVELOP DIFFERENTIATING EXPERIENCES, PROVIDING DOMESTIC AND INTERNATIONAL TOURISTS WITH REASONS TO STAY LONGER

STRATEGIC INITIATIVES

1. Ensure communities and local voices are actively represented in any development work undertaken in the region and that any concerns about potential impacts of tourism on local communities are highlighted at an early stage.
2. Provide training and mentoring support for community-based tourism enterprises and services to ensure that they are placed on a sustainable footing, by improving their operational, commercial, planning and governance skills in partnership with relevant agencies. Utilise Fáilte Ireland's Tourism in the Community: A Business Toolkit for Community Tourism Projects, in working with local community tourism projects.
3. Explore ways of leveraging community-based tourism initiatives to build loyalty among visitors.
4. Support a number of key demonstrator projects that can provide a blueprint for community-led regenerative tourism projects.
5. Engage local communities as appropriate in relevant interpretation projects that involve their local heritage and culture, in association with other relevant agencies and bodies, to create opportunities for local communities to present and share their own culture, traditions and heritage with visitors to their area.

4

STRATEGIC OBJECTIVE:

BUILD A COMMITTED STAKEHOLDER AND INDUSTRY PARTNERSHIP TO DEVELOP DESTINATION DUBLIN, ENCOMPASSING THE WHOLE REGION AND LEVERAGING CITIZEN-CENTRIC AND VISITOR-CENTRIC INITIATIVES FOR MUTUAL BENEFIT WHILE REDUCING THE INDUSTRY'S CARBON FOOTPRINT AND ENSURING NET CONTRIBUTION TO THE PROTECTION OF OUR CULTURAL AND NATURAL HERITAGE

STRATEGIC INITIATIVES

1. Actively track the tourism approval rating (TAR) and address any issues as they arise to build and sustain goodwill amongst local communities.

3.11. ENVIRONMENTAL PROTECTION & PROMOTION

RATIONALE

The Regional Tourism Development Strategy for Dublin provides a new context for how all existing and future tourism projects and initiatives are planned, developed and managed in a sustainable and integrated manner. The VICE (Visitor, Industry, Community and Environment) Model for Sustainable Tourism is the framework adopted within this plan. Fáilte Ireland recognises the need to integrate environmental considerations into this strategy in a way that responds to the sensitivities and requirements of the wider natural environment. Environmental considerations including water quality and amenity, climate change, traffic, biodiversity, built and cultural heritage, landscape, critical infrastructure and communities, all play a vital part in our tourism sector.

STRATEGIC APPROACH

The protection, enhancement and promotion of our most important tourism asset, the natural environment, has been an integral part of the formation of this strategy as is evidenced in the following:

1. Environmental assessments and resulting measuring and monitoring;
2. A firm commitment to ensuring sustainable and responsible tourism principles are practiced;
3. Compliance with statutory decision making and consent granting at strategy implementation stage;

4. Ensuring all DEDPs are screened and, where appropriate, have full environmental assessment completed; and
5. Integrating requirements for environmental protection and management.

This strategy is aligned alongside a hierarchy of statutory documents setting out public policy for land use development, tourism, infrastructure, sustainable development, environmental protection and environmental management. These include the National Planning Framework (NPF), Regional Spatial and Economic Strategies (RSEs) and lower tier Development Plans and Local Area Plans.

Implementing the strategy will involve Fáilte Ireland helping to facilitate, promote, support and coordinate stakeholders (including local authorities, other government agencies, tourism operators, site owners and operators, communities and visitors) in their activities in a way that is consistent with existing and emerging plans that have been subject to environmental assessment. The strategies do not provide consent, establish a framework for granting consent or contribute towards a framework for granting consent.

Implementation of the strategy shall be consistent with and conform with the NPF, RSEs and lower-tier land use plans, including provisions relating to sustainable development, environmental protection and environmental management that have been integrated into these documents including through SEA and AA processes. In order to be realised,

projects included in the Strategy (in a similar way to other projects from any other sector) will have to comply, as relevant, with various legislation, policies, plans and programmes (including requirements for lower-tier Appropriate Assessment, Environmental Impact Assessment and other licencing requirements green procurement as appropriate) that form the statutory decision-making and consent-granting framework, of which the Strategy is not part and does not contribute towards.

Having undergone Screening, the Strategies are subject to: Strategic Environmental Assessment (SEA)^[1] under the European SEA Directive and transposing Regulations; and Stage 2 Appropriate Assessment (AA)^[2] under the European Habitats Directive and transposing Regulations. The accompanying SEA Environmental Report and AA Natura Impact Statement set out the findings of the assessments and include information on: environmental constraints and opportunities; most likely and important potential environmental impacts; most likely locations/concentrations of potential impacts; mitigation measures; and monitoring measures.

The SEA and AA team worked with the strategy preparation team at Fáilte Ireland to integrate requirements for environmental protection and management into the strategy. The SEA identifies that the strategies, in combination with the wider statutory planning framework, will contribute towards the appropriate protection and management of environmental sensitivities and resources. The AA identifies that the strategy is not expected to affect the integrity of any European site.

The SEA and AA documents provide a comprehensive description of the environmental baseline including natural heritage, ecosystem services, designated sites and protected species within and beyond the Strategy area. The findings of the SEA and AA should be read in conjunction with the Strategy.

In contributing towards any outcomes under the strategies compliance will need to be demonstrated with, as relevant various legislation, policies, plans and programmes (including requirements for lower-tier Appropriate Assessment, Environmental Impact Assessment and other licencing requirements as appropriate) that form the statutory decision-making and consent-granting framework, of which the strategy is not part and does not contribute towards. Such legislation, policies, plans and programmes include:

- Requirements for lower-tier environmental assessment, including EIA and AA;
- Relevant land use and other sectoral plans that form part of the statutory decision-making and consent-granting framework and that have undergone environmental assessment, as appropriate, including various provisions relating to sustainable development, environmental protection and environmental management; and
- The Climate Action Plan.

Monitoring

An SEA Environmental Monitoring Programme for the strategy will be executed during implementation and operation. Monitoring can demonstrate the positive effects facilitated by the strategy and can enable, at an early stage, the identification of unforeseen adverse effects and the undertaking of appropriate remedial action.

A focus of the programme will be to: identify any specific activities that cause specific impacts; and to examine whether such impacts (if they exist) have higher prevalence at certain site types.

The occurrence of persistent significant adverse environmental effects which are directly attributable to tourism would necessitate consideration of the effects in the context of the strategy and a possible review of part(s) of the strategy.

Environmental monitoring will be based around indicators that allow quantitative measures of trends and progress over time and a variety of sources of information will be used to run the programme. Environmental monitoring will be executed by Fáilte Ireland and will run concurrent with the implementation phase of the strategy itself. It will be reported on to the strategy's implementation group on an annual basis where relevant information sources allow, and the findings of the monitoring will influence the actions of the strategy as it progresses. The monitoring will be linked directly to the strategy KPIs, including monitoring of visitor numbers where relevant.

Environmental monitoring for the strategy and other existing/future Fáilte Ireland plans, programmes, etc. may be undertaken and reported on at the same time. This monitoring will be built on and compliment the work of Fáilte Ireland's new National Environmental Monitoring Programme 2021–2026.

With respect to infrastructural capacity (including drinking water, wastewater, waste and transport)

the potential impact on existing infrastructure as well as the potential environmental effects of a likely increase in tourism-related traffic volumes along any routes resulting from the relevant initiative will be considered and mitigated as appropriate, where relevant.

Close collaboration will also be undertaken with the relevant stakeholders, such as Local Authorities and Irish Water, to ensure that any proposed tourism developments align with the capacity of the supporting critical service infrastructure. Safeguarding of the natural environment through monitoring will also be bolstered by the requirement to consider the following guidance documents and procedures which have been and in some cases are currently being developed by Fáilte Ireland. This list will be updated over the life of the Strategy as and when guidance and procedures are developed.

Further details on these can be found in Appendix 2–8.

- ESite Maintenance Guidelines;
- Visitor Management Guidelines;
- Environmental Management for Local Authorities and Others
- Environmental Damage Resolution Procedure
- Greenway Visitor Experience & Interpretation Toolkit
- Environmentally Responsible Promotion – Statement
- Blueway Development & Management Guide
- Sustainable Recreational Trail Development & Operation (to be developed).

Visitor Management

In contributing towards outcomes under the Strategy, partners and stakeholders shall seek to manage any increase in visitor numbers and/or any change in visitor behaviour in order to avoid significant effects including loss of habitat and disturbance, including ensuring that new projects are a suitable distance from ecological sensitivities.

Extensive research by Fáilte Ireland has shown improved environmental outcomes (including improved attainment of conservation objectives) in areas with visitor management strategies. Visitor management strategies may be required from partners and stakeholders who are contributing towards outcomes under the Strategy, as relevant and appropriate.

Visitor management strategies will be required for proposed plans, programmes and projects that are to receive funding as relevant and appropriate.

Green Infrastructure and Ecosystem Services

Green infrastructure can be defined as a strategically planned network of natural and semi-natural areas. In contributing towards outcomes under the Strategies, partners and stakeholders shall contribute towards the maintenance of existing green infrastructure and its ecosystem services, taking into account the output of the Mapping and Assessment of Ecosystem Services project being undertaken by the NPWS. Proposals for the development of any green infrastructure should demonstrate the synergies that can be achieved with regard to the: provision of open space amenities; sustainable management of water; protection and management of biodiversity; protection of cultural heritage; and protection of protected landscape sensitivities.

Greenway Development

Extension of existing greenways and future development of new greenways and blueways should complement and integrate rather than replace existing green infrastructure. Stakeholders considering the development of greenways and blueways should have regard to the Fáilte Ireland publication "Greenway – Visitor Experience & Interpretation Toolkit" and "Connecting with nature for health and well-being" EPA Research Report 2020.

Environmental Damage Resolution

Action-based responses are essential at site-specific level in response to instances of environmental perturbation. Although the Strategy is not envisaged as being likely to directly result in any such instances of environmental perturbation, it forms part of a hierarchy of tourism initiatives, including lower tier DEDPs, and the wider Statutory planning framework. The Environmental Damage Resolution procedure provides for a consistent approach in responding to such issues and is available for integration at DEDP and site-specific levels.

Environmentally Responsible Tourism Promotion & Campaign Statement

Environmental considerations will be integrated into promotional processes and environmentally responsible tourism campaigns will be required. Such campaigns will garner environmental stewardship that will help to ensure environmental protection and management. Promotional processes will be informed by environmental considerations, including available capacity, at a local level.

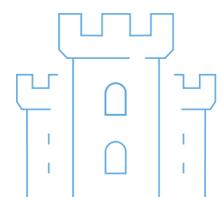
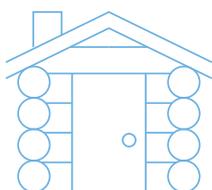
Site Management

Fáilte Ireland's extensive monitoring of the effects of tourism to date has shown predictors of impact occurrence to include: site type; group type; the number of activities; activity intensity; and the interaction between activity intensity and abundance. Site management must consider these factors in seeking to reduce the potential for impacts to occur and to remove impacts.

Climate Action

Fáilte Ireland will comply with the most up to date Climate Action Plan, National Climate Change Adaptation Framework and National Mitigation Plan, including contributing towards efforts to decarbonize the tourism sector, improve low carbon travel, such as walking and cycling, and the circular economy.

Fáilte Ireland's 2023 Corporate Strategy will identify progress in relation to relevant actions as set out under the Climate Action Plan and the meeting of national and sectoral commitments relating to emission targets.



STRATEGIC FOCUS FOR ENVIRONMENTAL SUSTAINABILITY – ADDRESSING OUR STRATEGIC OBJECTIVES

1

STRATEGIC OBJECTIVE:

INCREASE RESILIENCE BY OPTIMISING VISITOR MIX AND MAXIMIZING REVENUE BY INCREASING DWELL TIME AND RANGE OF ACTIVITIES ENGAGED IN

STRATEGIC INITIATIVES

1. Benchmark the destinations within the region against an internationally recognized sustainability standard and create a plan to improve their sustainability rating over the course of this strategy.
2. Promote responsible tourism practices among tourism providers and encourage them to pursue sustainability certification as appropriate.
3. Fáilte Ireland will work with a number of other State Agencies, such as SEAI, and industry groups to support the industry in reaching its carbon reduction targets as per the Carbon Budget and the Climate Action Plan 2021. We will also support the uptake of sustainability measurement and certification programmes at both enterprise and destination levels.
4. Ensure the conservation and maintenance of key elements of biodiversity as part of any development projects to ensure they do not contribute to biodiversity losses or deterioration (i.e., there should be no net loss of biodiversity).
5. When implementing initiatives associated with land and water-based initiatives, it is our objective to ensure the containment and control of Invasive Alien Species (IAS) with accordance with the EC (Birds and Natural Habitats) Regulations, 2011.
6. Identify opportunities to enhance or create Green Infrastructure (GI) and ecological corridors which can provide important links in the connectivity of European Natura 2000 sites and other protected sites.
7. Ensure that all proposed land development in the Regional Tourism Development Strategy incorporates positive biodiversity measures as standard practice. Actions can include simple measures, e.g. all new public buildings incorporate nesting boxes for swifts and/or bat boxes, the creation of wildlife habitats on public open spaces, to more ambitious measures that will ensure 'biodiversity net gain' on public development schemes.
8. Promote the Leave No Trace principles to both visitors and tourism providers.
9. Implement the Environmental Monitoring Programme, as referenced above, to ensure that the effects of tourism on environmental, heritage and cultural assets is monitored to allow for early detection of any possible issues.
10. Undertake a series of initiatives with a range of stakeholders in accordance with good environmental practice to create new sustainable tourism opportunities.
11. Support tourism development in de-carbonisation zones as differentiators for the visitor.
12. Any initiatives or development resulting from further extending tourism activity into the shoulder season and winter will take into account the potential impact on overwintering birds, particularly at sites that are seasonally used by these species, such as Dublin Bay, Phoenix Park, St. Anne's Park, Bull Island and other public spaces used for tourism and recreation, and will seek to avoid any negative impacts.

4. MEASURING SUCCESS

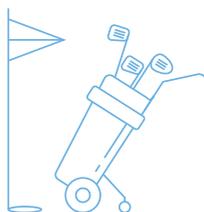


4.1. MEASURING SUCCESS

The following is a series of targeted outcomes that are linked to four overarching goals set out under the VICE model, each with its own KPIs (Key Performance Indicators).

KPIs	DATA SOURCE
<p>1. The city will rank within the top 3 of its competitive set internationally, supported by a differentiated winter offering.</p>	<ul style="list-style-type: none"> ● International benchmarking; STR data (occupancy, ADR, RevPAR).
<p>2. Visitors will navigate the city easily, with ticket-less public transport and best in class way-finding & digital content.</p>	<ul style="list-style-type: none"> ● Fáilte Ireland's Destination Attitudes Survey (DAS).
<p>3. An increase in visitor satisfaction ratings of people who visit Dublin.</p>	<ul style="list-style-type: none"> ● Fáilte Ireland's DAS.
<p>4. Visitors find ease of access to high quality information about what there is to see and do in the region prior to visiting.</p>	<ul style="list-style-type: none"> ● Fáilte Ireland's Behaviour and Brand Tracker (BBT) / Survey of Overseas Travellers (SOT).
<p>5. Year-on-year increase in the number of domestic and overseas visitors engaging with the Dublin brand on social media.</p>	<ul style="list-style-type: none"> ● Social media surveys.

KPIs and metrics will evolve during the life of this RTDS.



INDUSTRY KPIs

TO ALIGN TO A SINGLE VISION THAT FACILITATES THE DELIVERY OF BALANCED AND SUSTAINABLE REVENUE AND JOBS GROWTH ACROSS THE ENTIRE REGION – CITY AND COUNTY.

KPIs	DATA SOURCE
1. Tourism revenue in Dublin has returned to 2019 levels by 2026.	● Fáilte Ireland's SOT; Fáilte Ireland estimate of Domestic Visitor Spend.
2. Dublin will be an attractive destination for domestic visitors, and day trippers will contribute significantly to overall domestic spend.	● Fáilte Ireland's BBT; CSO data.
3. International visitors will stay longer and spend more.	● Fáilte Ireland's (SOT).
4. Optimum business mix will be achieved across the industry, as new segments (families/ outdoors) continue to grow.	● Industry networks surveys.
5. Hero festivals will be enhanced or developed as key motivators for travel or to provide animation within the region.	● Festivals launched and post festival analysis.
6. We will offer best-in-class experiences, fully optimised digital capability, world class storytelling and multi-lingual tour guides (in large/iconic attractions).	● Fáilte Ireland Digital that Delivers metrics; Industry network surveys.
7. We will speak with one voice to sell and market "Destination Dublin", with the brand proposition fully adopted, embraced and activated.	● Industry networks surveys; industry adoption of brand assets; DEDP KPIs.

KPIs and metrics will evolve during the life of this RTDS.

COMMUNITY KPIs

TO ENSURE THAT TOURISM IN DUBLIN DELIVERS ECONOMIC AND SOCIAL BENEFITS TO LOCAL COMMUNITIES, CONTRIBUTING TO THE REGION BEING A BETTER PLACE TO LIVE, WORK AND STUDY.

KPIs	DATA SOURCE
<p>1. Communities maintain and/or improve their Tourism Approval Rating, to demonstrate they have embraced tourism and value a visitor economy that provides diverse employment opportunities across the city and county.</p>	<ul style="list-style-type: none"> Fáilte Ireland's Community Survey.
<p>2. Year-on-year increase in employment in the sector.</p>	<ul style="list-style-type: none"> Fáilte Ireland data and/or CSO data
<p>3. Character mapping will be complete, differentiating the visitor experience across city "villages", with full engagement with local communities, who are at the very heart of the authentic experience.</p>	<ul style="list-style-type: none"> Bespoke research to be developed to track, as part of the Dublin City DEDP
<p>4. Visitors will experience the real Dublin with communities sharing their city in an engaging and authentic way.</p>	<ul style="list-style-type: none"> Fáilte Ireland's DAS

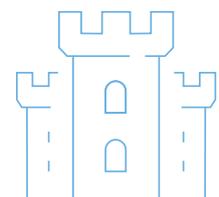
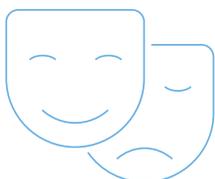
KPIs and metrics will evolve during the life of this RTDS.

ENVIRONMENT KPIs

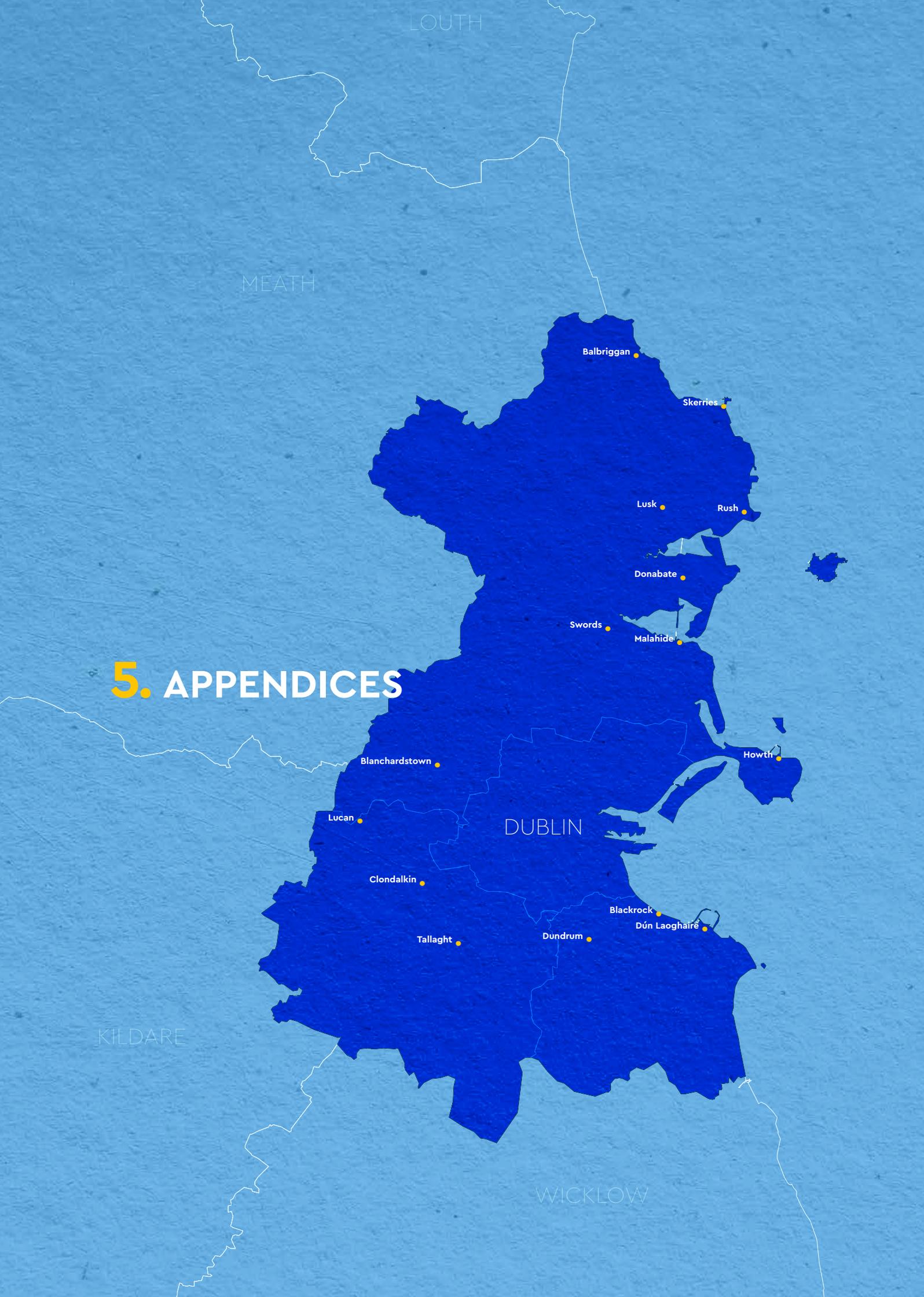
TO ENSURE THAT THIS PLAN FACILITATES THE PROTECTION AND ENHANCEMENT OF THE ENVIRONMENT IN DUBLIN AS THE FUNDAMENTAL ASSET OF TOURISM IN THE REGION, IN ASSOCIATION WITH OTHER KEY STAKEHOLDERS.

KPIs	DATA SOURCE
<p>1. The Dublin RTDS demonstrates full compliance with all relevant requirements arising from EU and Irish planning and environmental legislation.</p>	<ul style="list-style-type: none"> ● Strategic Environmental Assessment, Appropriate Assessment & Fáilte Ireland's National Environmental Monitoring Programme 2021 – 2026.
<p>2. Tourism businesses are on track to meet their carbon reduction targets as per the Carbon Budget and in line with the Climate Action Plan 2021.</p>	<ul style="list-style-type: none"> ● Surveys will be conducted regularly during the lifetime of this RTDS to monitor progress of Dublin tourism businesses towards goal.
<p>3. Dublin is a recognised global leader as a sustainable conference destination.</p>	<ul style="list-style-type: none"> ● GDS-Index.
<p>4. The outdoors will be fully optimised in a sustainable way, from place-making and animation of public realm in urban areas to maximising the opportunities for visitors to explore and experience the great outdoors, including walking and cycleways, at the coast and mountains.</p>	<ul style="list-style-type: none"> ● Consumer Sustainability Tracker (CST) which will track sustainability perceptions and engagement. ● ORIS Scheme. ● Greenway Interpretation Scheme.
<p>5. Tourism activities are not contributing to environmental damage, but are contributing to net gain of habitats and species.</p>	<ul style="list-style-type: none"> ● Fáilte Ireland's National Environmental Monitoring Programme 2021 – 2026.
<p>6. Year-on-year increase in the uptake by industry of sustainability/ environmental certification.</p>	<ul style="list-style-type: none"> ● Certification schemes.

KPIs and metrics will evolve during the life of this RTDS.



5. APPENDICES



5.1. APPENDICES

APPENDIX A1

NATIONAL & REGIONAL POLICIES

PROJECT 2040 – National Planning Framework.

National Development Plan 2021 – 2030.

Climate Action Plan 2021.

People, Place & Policy: Growing Tourism to 2025, Department of Transport, Tourism and Sport

- *Tourism Action Plan 2019 – 2021.*

- *Actions to Promote Sustainable Tourism Practices 2021 – 2023, Sustainable Tourism Working Group.*

Our Rural Future: Rural Development Policy 2021 – 2025.

Strategy for the Future Development of National and Regional Greenways,
Department of Tourism, Transport and Sport (July 2018).

Blueway Management and Development Guide, Blueways Ireland.

National Physical Activity Plan for Ireland 2013 – 2025, Healthy Ireland.

Tourism Recovery Plan 2020 – 2023, Tourism Recovery Task-force.

Regional Spatial and Economic Strategy for the Southern Region (Southern Regional Assembly).

Regional and Economic Strategy 2019 – 2031 (Eastern & Midland Regional Assembly).

Regional Spatial and Economic Strategy 2020 -2032 (Northern & Western Regional Assembly).

Dept of Business Enterprise & Innovation

- *Dublin Regional Enterprise Plan.*

OPW/ NPWS

- *Heritage Ireland 2030.*

Coillte

- *Outdoor Recreation Plan 2017 – 2021.*

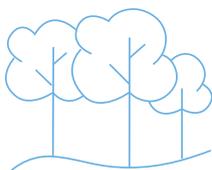
- *Coillte Recreation Policy 2016.*

LOCAL AUTHORITY LEVEL

Local Authority	Development Plan	Tourism Strategy	Transport Strategy
South Dublin County Council	Dublin Draft County Development Plan 2022–2028	South Dublin Tourism Strategy	Draft Transport Strategy for the Greater Dublin Area 2022–2042
Dublin City Council	Dublin City Draft Development Plan 2022–2028		Draft Transport Strategy for the Greater Dublin Area 2022–2042
Fingal County Council	Fingal Development Plan 2017–2023	Fingal Tourism Strategy 2015–2018	Draft Transport Strategy for the Greater Dublin Area 2022–2042
Dún Laoghaire Rathdown County Council	Dún Laoghaire Rathdown Draft County Development Plan 2022–2028	Dún Laoghaire Rathdown Tourism Strategy & Marketing Plan 2017–2022	Draft Transport Strategy for the Greater Dublin Area 2022–2042

Appendices A2 – A8 to this Regional Tourism Development Strategy are contained in a separate volume and are as follows:

- A2:** Site Maintenance Guidelines.
- A3:** Visitor Management Guidelines.
- A4:** Environmental-Management-for-Local-Authorities-and-Others.
- A5:** Environmental Damage – Resolution Procedure.
- A6:** Greenway Toolkit.
- A7:** Responsible Promotion – Statement.
- A8:** Blueway Development and Management Guide.





Dublin