

DÚN LAOGHAIRE 2040

A Spatial and Economic Study
for Dún Laoghaire Town



November 2021



Rialtas na hÉireann
Government of Ireland

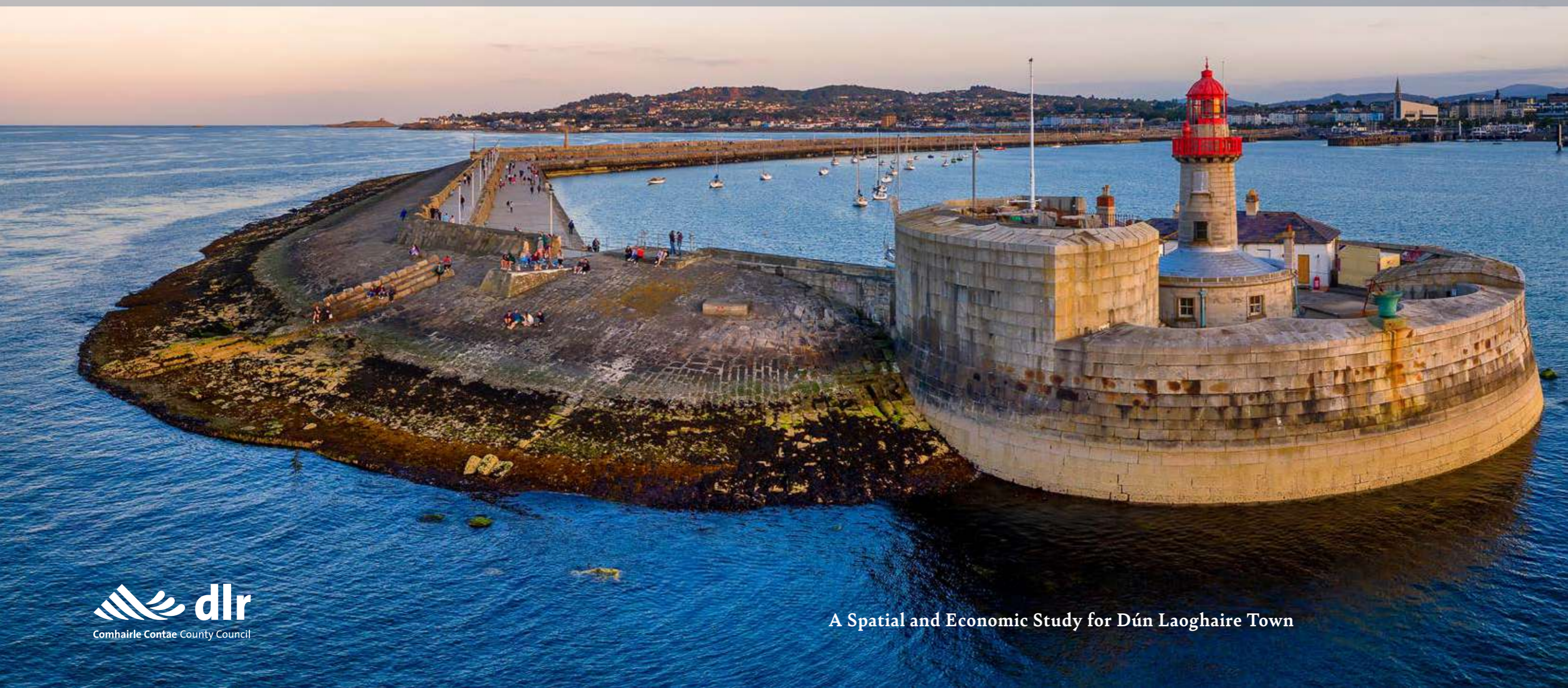
Urban Regeneration and
Development Fund (URDF)



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EXECUTIVE SUMMARY

The Dún Laoghaire Town Spatial & Economic Study (the Study) has been commissioned by Dún Laoghaire-Rathdown County Council and undertaken by KPMG Future Analytics. Dún Laoghaire town has an enviable location but has seen varying levels of vibrancy in recent decades. On-going work by Dún Laoghaire-Rathdown County Council through initiatives such as the public realm enhancement of Dún Laoghaire Main Street, the Metals public realm improvements and the development of the iconic Lexicon building has had significant regenerative effects on the town.

“Dún Laoghaire Rathdown County Council recognise the importance of Dún Laoghaire Town as an economic hub and the county town. It is crucial that Dún Laoghaire town is sufficiently prepared to respond to the changing economic environment...”

The Dún Laoghaire Town Spatial & Economic Study (the Study) has been commissioned by Dún Laoghaire-Rathdown County Council and undertaken by KPMG Future Analytics. Dún Laoghaire town has an enviable location but has seen varying levels of vibrancy in recent decades. On-going work by Dún Laoghaire-Rathdown County Council, through initiatives such as the public realm enhancement of Dún Laoghaire’s George’s Street, the Metals public realm improvements and the development of the iconic dlr Lexlcon building, has had significant regenerative effects on the town.

Dún Laoghaire Rathdown County Council recognise the importance of Dún Laoghaire Town as an economic

hub and the county town. It is crucial that Dún Laoghaire town is sufficiently prepared to respond to the changing economic environment and able to harness new economic and investment opportunities as they arise.

This Study is a proactive step by Dún Laoghaire-Rathdown County Council to identify:

- Potential opportunities to grow its employment base in a manner that improves the vibrancy and vitality of the town creating local employment opportunities;
- Appropriate and proactive enabling policies; and
- Practical measures to attract key target economic sectors and initiatives to stimulate growth.

This economic and spatial study seeks to position Dún Laoghaire Town as a vibrant, attractive, community. One where people, place and economy are part of a more sustainable future, that encourages people to live in proximity to where they work, with a range of accessible services to meet their needs within the local area. A town that is a desirable place to live, work, invest and visit, for current and future generations.

A brief introduction is provided in Chapter 1, followed by a situation analysis summary in Chapter 2, (with further detail provided in Appendix 2 and 3). This detail includes a socio-economic profile of the town centre study area; a comprehensive analysis of the distribution of businesses within the study area, a land use survey and vacancy analysis; and a summary of policy context and relevant market factors including economic trends and drivers. Chapter 3 provides a spatial analysis of the study area, including a summary of the Interim Dún Laoghaire Urban Framework Study, and a review of potential opportunity sites.

A public consultation programme was also undertaken in February-March 2021, as summarised in Chapter 4, which saw significant engagement; with 821 responses to the online public survey and 188 responses to the online business survey. In addition, over 25 one-to-one and group interviews were held to inform the development of the Study. The summary findings from preceding chapters are summarised in the detailed SWOT analysis provided in Chapter 5, which informs the vision and recommendations outlined in Chapter 6.

It is essential that the town centre and harbour share a vision for the future to maximise the economic potential of Dún Laoghaire. The commercial core and waterfront areas should not



be viewed through different lenses, but as complementary elements of a vibrant waterfront town which provides an attractive social, spatial, and economic offering for the resident community, local economy, tourists, visitors, and commuting workers alike.

The aim of this Study is to provide the data required for future plans to develop Dún Laoghaire Town into a growing and prosperous settlement within the Dublin Metropolitan Region, by facilitating major developments in employment

and government-funded improvements throughout the town which will attract further investment. Recommendations and projects within this Study are framed by the three themes of ‘Foundations for a Strong Economy’, ‘Supporting Existing & Attracting New Businesses’, and ‘A Desirable Town’, which identify new opportunities for growth in various economic areas. The Study concludes with a detailed delivery plan in Chapter 7, and processes for monitoring and evaluation in Chapter 8.

INTRODUCTION

Chapter one

“Dún Laoghaire Town has an enviable and scenic location near Dublin City Centre and linked by DART, cycle and bus routes, adjacent to Dún Laoghaire Harbour.”



INTRODUCTION

The Dún Laoghaire Town Spatial & Economic Study has been commissioned by Dún Laoghaire-Rathdown County Council and undertaken by KPMG Future Analytics. A parallel study, undertaken by Indecon Economic Consultants, relates to the adjoining harbour with which the town has a strong inter-relationship. Recognising that the town and the harbour must be considered in tandem, each study has been developed with a strong understanding of common issues and opportunities. A shared vision is considered imperative for the success of both town and harbour and this underpins the recommendations provided throughout the Study.

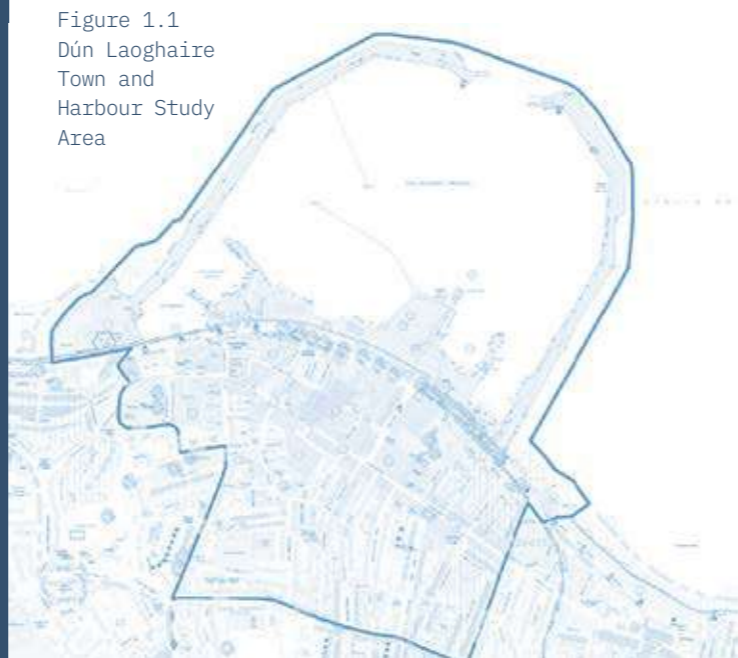


Figure 1.1
Dún Laoghaire
Town and
Harbour Study
Area

The study area for the town and harbour Studies is shown in Figure 1.1, comprising 226.7ha of urban area. Dún Laoghaire Town has an enviable and scenic location near Dublin City Centre and linked by DART, cycle and bus routes, adjacent to Dún Laoghaire Harbour. Dún Laoghaire has a vibrant and traditional town centre offering but has seen varying levels of vitality in recent decades, with recent investment targeted particularly toward accommodation and restaurants. On-going work by Dún Laoghaire County Council through initiatives such as public realm

enhancement of Dún Laoghaire Main Street, the Metals public realm improvements and the development of the iconic Lexicon building has had significant regenerative effects on the town. Additional works to the Dún Laoghaire Baths will further contribute to the waterfront offering once complete.

Dún Laoghaire-Rathdown County Council recognise the importance of Dún Laoghaire as the county town and an important economic hub within the Greater Dublin Area. The significant public realm improvements completed to date,

along with significant investment in residential developments have resulted in the strongest rate of population increase in the area in decades. A key concern of Dún Laoghaire-Rathdown County Council is the ongoing shift towards residential occupancy with the town centre, and consequent reduction in the employment base, compared to other parts of the County. A key objective of the Council is to ensure balanced growth by identifying constraints to employment growth in the town and seeking opportunities to improve vibrancy and vitality in the core urban area.

In the coming years, it is crucial that Dún Laoghaire Town is prepared to respond to the changing economic environment and able to harness new economic and investment opportunities as they arise. This strategy is a proactive step by Dún Laoghaire-Rathdown County Council to identify:

It is recognised that the vibrancy and appearance of a town will impact on its desirability as a place to invest in. It is further recognised that vibrancy of place occurs as a result many factors that include but are **not limited to:**



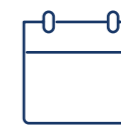
POTENTIAL OPPORTUNITIES

Potential opportunities to grow its employment base in a manner that improves the vibrancy and vitality of the town creating local employment opportunities



URBAN REALM

An attractive urban realm that encourages visitors from the local community and further afield to stay longer and spend more on an enjoyable experience



EVENTS AND PROMOTIONS

A range of events and public promotions with positive messaging of the town as a desirable place to visit



ENABLING POLICIES

Appropriate and proactive enabling policies



ACCESSIBLE TOWN CENTRE

A permeable and accessible town centre that entices pedestrian and cycling enthusiasts



TOWN MANAGEMENT

Strong and effective management of the town to evolve in a way that is cognisant of trends in urban development



POTENTIAL OPPORTUNITIES

Practical measures to attract key target economic sectors and initiatives to stimulate growth.



A SUBSTANTIAL TOWN POPULATION

A substantial town population who will help to drive the evening economy



VARIED COMMERCIAL OFFERING

A varied commercial offering that appeals to a wide range of target markets with varied tenures

Together this will ensure Dún Laoghaire Town becomes a destination of choice for economic investment; in harmony with and harnessing the economic development of the harbour, driving employment growth and the vibrancy of the town.

This chapter provides a summary of detailed analysis of the baseline analysis, policy and trends analysis. Further detail is provided in Appendix 2 and 3.



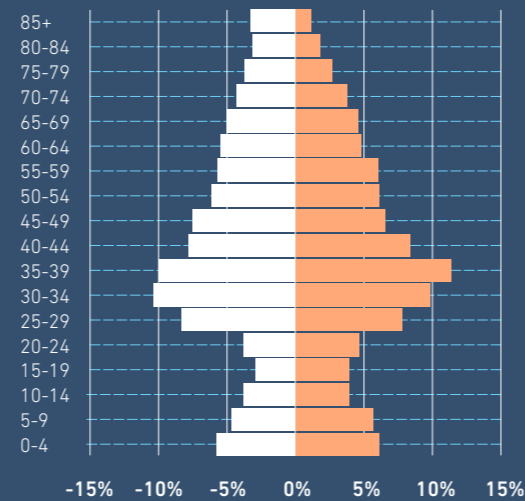
Chapter two

DÚN LAOGHAIRE SITUATION ANALYSIS

DÚN LAOGHAIRE AREA SITUATION ANALYSIS

“451 large-scale residential units have been granted since 2016 in the study area, if all granted units were built and filled this would cater for approximately an additional 1,024 persons living in the Study Area”

Figure 2.1 Dún Laoghaire Town Population Pyramid (CSO, 2016)



2.1 Baseline Analysis Summary

This section consists of a summary of the demographic and socio-economic profile of the study area and includes data and information of demography, dependency rates, levels of educational attainment, labour force participation level and sectors, principal economic status and, socio-economic groups. The baseline analysis also consists of; a retail analysis, analysis of change of use planning applications for commercial and residential units vacancy analysis, changes in property use, a land use survey, an analysis of tourism and events, and an analysis of current community and business groups. The key insights are as follows:

Population

- 451 large-scale residential units have been granted since 2016 in the study area, if all granted units were built and filled this would cater for approximately an additional 1,024 persons living in the Study Area.
- The study areas population decreased by 2% from 2011 to 2016, with the biggest change being a decrease of 26.9% of people aged 20-29.
- The study area has an average age and age dependency ratio (Dependents are defined for statistical purposes as people outside the normal working age of 15-64.) well below the state average, however since 2011 the student population has declined by 9.5% and the retired population grew by 2%, which highlights the towns ageing population.

Age profile

- Approximately 68% of the study area in 2016 are aged between 15-64 which broadly represents the labour force for the town. This cohort is a key driver of the economy, and their importance cannot be understated. It is important that his age group have access to vital accommodation, retail, and social infrastructure benefits within the town.



Households and Housing Characteristics

- One person households, despite a decrease of 14.8% from 2011 to 2016 remains the largest household group at 33.8%. The decrease in the number of households within the study area by 5.5% resulted in the average household size increasing from 2.13 to 2.27 between 2011 - 2016.
- The number of vacant dwellings within the study area decreased by 33% between 2011 - 2016 from 489 to 328 dwellings.
- Between 2010 - 2020, residential property prices in Dún Laoghaire Rathdown County increased by 3.36%, and by a further 1.75% in the first 6 months of 2021.

Education

- Dún Laoghaire has three third level education institutes within the town and its surrounding area as well several primary schools and five secondary schools.
- Between 2011-2016, more people within the study area's population were continuing into higher levels of education. The study area has a very good level of education attainment and is substantially higher than the state averages when it comes to NFQ7 and above.

Employment Centres

- There are several large employers within study area and large shopping centres bringing footfall during the daytime, balance is needed by promoting evening economy activities.
- The predicted increased in residential presence in the town centre within Dún Laoghaire town will increase the demand for evening economy activities like restaurants and bars as more people will be within the area during the evenings. The rationale for this is that employment footfall will strengthen the day-time economy and contribute to a degree to the evening economy (after work drinks/ dinner etc); while more people living in the town centre would usually result in a higher demand for evening activities, especially on weekends when majority of employees would not be in the work place.

Principal Economic Status

- The number of unemployed people in the study area decreased by 42.5% between 2011-2016 and accounts for 5.2% of the working aged population as of 2016.
- Despite a decline of 9.5%, students are third highest in the age group classification behind retirees and people at work. Students are generally those people who have just finished secondary school and are, therefore, quite a youthful cohort. Retaining this cohort, once their studies have been completed, could be essential for the local economy and important if Dún Laoghaire is to continue to grow and become a young, vibrant location.
- Of the people 'At work' within the study area, the analysis highlights that 'Professional Occupations', and 'Associate Professional and Technical Occupations' are the most predominant socioeconomic groups. Over 20% of the working population were classed as 'Employers and Managers'.

Industry of Employment

- As figure 2.2 overleaf shows, the largest industry of employment recorded for residents is 'Commerce and trade' which represents 30.6% of the working population, followed by 'Professional services' at (24.7%). Once again, these figures would indicate a higher skilled, higher educated, and potentially higher earning workforce in the study area.
- There has been a steady increase in employment since 2012. The main industries in the study area of Commerce & Trade, Professional Services and Public Administrative Services have shown an increase of 25% over the 9-year period. Retail in the Dublin Region has seen a decrease of over 14% between the first quarter of 2019 and 2020 however, this industry increased over 2020 with a 19% increase recorded in quarter 1 over 2021.
- Across all Economic Sectors in the Dublin region there was an increase in employment of 2% in 2019 while 2020 saw an average decrease in employment of 6%.



Table 2.1 Levels of educational change in Dún Laoghaire Town (2011/2016)

Education Level	2011	2016	Change
Masters or Higher	827	978	18.3%
Third Level (Level 7+)	1928	2076	7.7%
Third Level (Level 6+)	2263	2395	5.8%
Up to Leaving Cert	1446	1133	-21.6%
Primary or Less	454	305	-32.8%

“Across all Economic Sectors in the Dublin region there was an increase in employment of 2% in 2019 while 2020 saw an average decrease in employment of 6%”

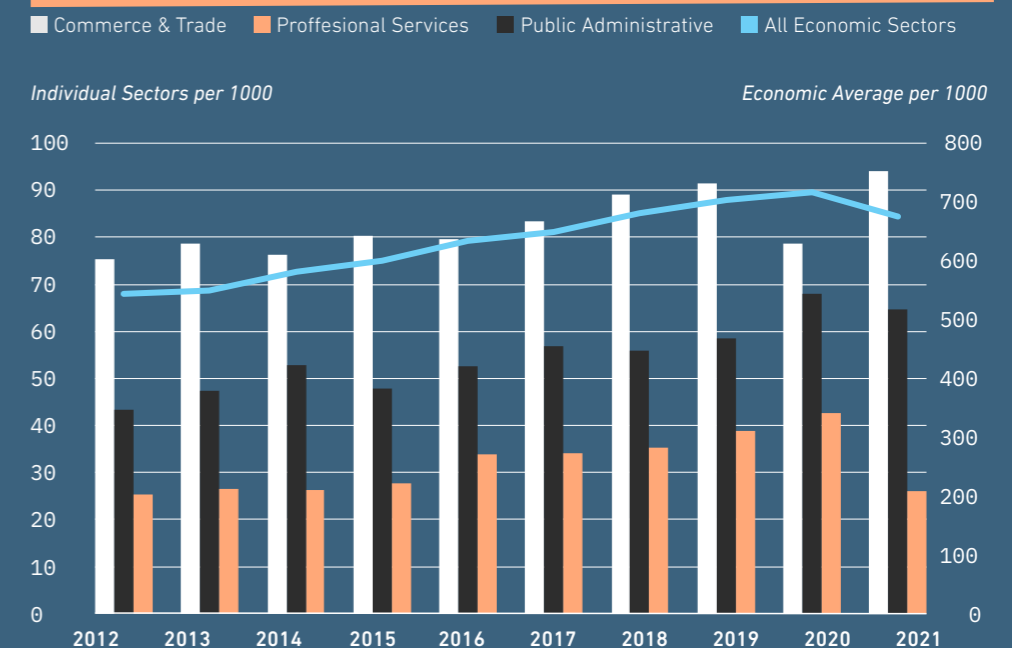
Means of Travel to Work and Education

- The study area attracts more commuters who are situated further South to the study area while Commuters who leave the study area are travelling North into the City Centre.
- 31% of commuters to work/ education used a car (Driver and passenger), while 34% used public transport (Train, Dart or LUAS and Bus, Minibus or Coach). This data relates to the population of the study area and how they travel to/from their destination, the destination is not specified.

Connectivity

- The number of households with a personal computer decreased by 5.6% while the number of households with access to the internet in the form of broadband increased by 8.6%. As of 2016, 82.2% (1,899) of households identified they had some form internet access (Broadband or other).

Figure 2.2 Persons aged 15+ Employed in Dublin (CSO, Labour Force Survey, 2021)



Workplace zone comparisons

- KPMG Future Analytics have considered three key towns of Swords, Bray and Maynooth in comparison to Dún Laoghaire town centre as illustrated in Figure 2.3. When divided by the study area size, Dún Laoghaire contains a high concentration of inward commuters for work. Of the 35 workplace zones situated within the study area boundary the range of Workers per Kilometres Squared ranged from 57 to 273 workers. This implies there is a considerably higher concentration of workers entering the study area when compared to larger settlement centres such as Swords which ranged from 0 to 57.
- The largest industry recorded by workers in the Study Area Workplace zones were IT and Financial services (27%), Retail Trade (22%), Education and Health (19%).

Retail Services

- Four identifiable clusters of businesses were identified and observations from these shows that there are a wide variety of café and food shops but a limited number of high-quality restaurants. The relatively young and professional population could potentially present a level of demand for high-quality restaurants which could in turn increase vibrancy and Dún Laoghaire's evening economy.
- There are six charity shops with vintage clothing, a reason for this high number would likely be due to the trend of upcycling, which could be used as a competitive marketing advantage for the town centre. There are a limited number of comparative clothing outlets, particularly ladies' fashion. There is a strong concentration of good quality interiors shops in the town.
- Dún Laoghaire is home to a wide range of retail units, and two shopping centres, the Dún

Laoghaire Shopping Centre (DLSC) and Bloomfield's shopping centre. Retail provision within the town has suffered from vacancy in the last decade but has seen increased occupancy in recent years.

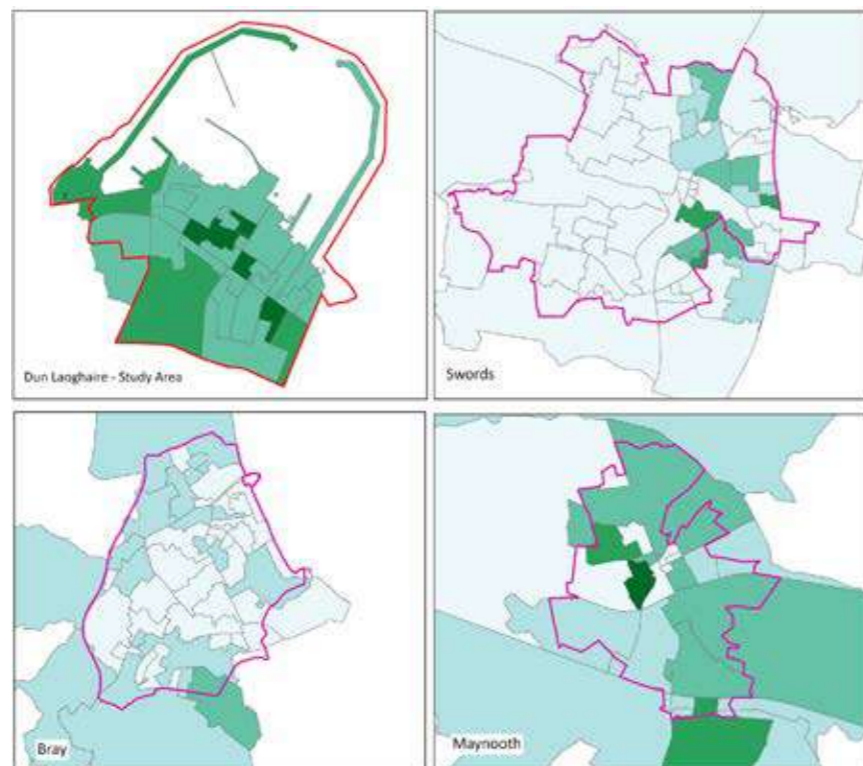
- An objective should be to activate vacant commercial premises within the study area. This would bring additional employment, increasing daytime spending and generally make the town more desirable, town centre property more valuable and more vibrant. However, it is acknowledged that DLRCC have reduced the vacancy refund rate from 100% to 35% since 2015 and offer a vacant property grant, therefore there may be limited capacity to activate vacancy property beyond these measures.

Figure 2.3 Comparison of Dún Laoghaire Town study area, Swords, Bray and Maynooth town centres, source CSO, 2016

CSO Settlement Boundary
Study Area

Total Workers by km²

- 0-35
- 35-57
- 57-94
- 94-158
- 158-273



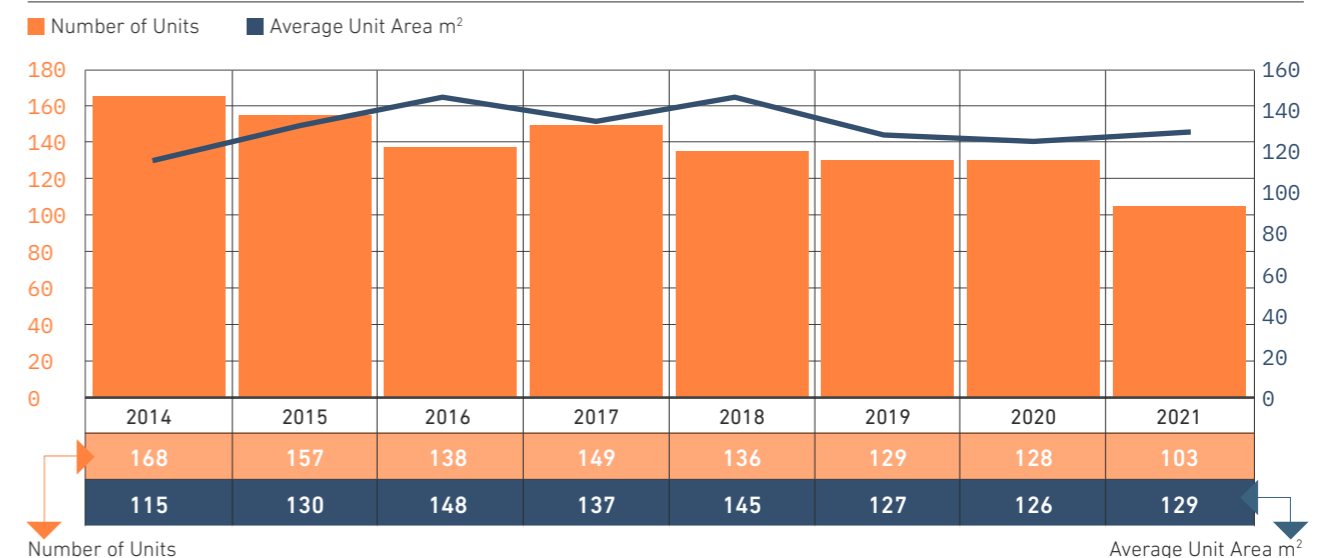
Planning Conversions

- Analysis of planning data by KPMG Future Analytics to inform this study indicates that since 2016, a total of seven planning applications have been granted to change the use of commercial units to solely residential units resulting in the loss of approx. 4,500m² of commercial floor space and the provision of 41 new residential units.
- A total of seven granted change of use applications from commercial to mixed use resulted in the loss of approx. 1,170m² of commercial floor space and the provision of 18 new residential units.
- The loss of 5,670m² of commercial floor space equates to an indicative figure of approx. 473 jobs based on an average 12m² needed per employee.
- There was one granted change of use application to change from retail to fully residential use resulting in the loss of approx. 480m² of retail floor space and the provision of 14 new residential units. Two change of use applications from retail to mixed use was also identified resulting in the loss of approx. 230m² of retail floor space and the addition of 4 new residential units.
- A further 20 residential units have been recorded under the 'Living over the shop' planning permission exemption illustrating a trend towards mixed use developments in the study area.

Vacancy Analysis

- A total of 862 commercial units were recorded within the study area and 103 units are vacant. This gives a 11.94% commercial vacancy rate for the Dún Laoghaire Town study area. This rate is similar to the national average vacancy rate of 13.6% and Dublin of 12.2% calculated by the Geodirectory.
- On a yearly average the number of vacant units has been decreasing since 2014, going from 168 vacant units to 103 vacant units in 2021, as shown in figure 2.4a below, but the sizes of vacant properties have increased from an average unit area of 115m² in 2014 to 129m² in 2021.
- Figure 2-4a below illustrates the decrease in unit numbers and Average Unit Area (m²). The total amount of annual commercial space as illustrated in Figure 2.4b on the following page, has decreased by 35% from 2017 to 2021, this value represents the total available commercial space annually, 2017 recorded 20,392.7 m² available compared to 2021 with 13,255m² available.
- An opposite trend in the average unit area was discovered in the Industrial Uses category with 26 units recorded with an average unit area of 310m² while 13 units were recorded as vacant with an average unit area of 386m². The total commercial space being occupied by this category is 8,071m² while the 13 vacant units recorded a total available space of 5,019m², this implies the small number of vacant units are of considerable size which could be re-occupied or redeveloped. These units are detailed in Appendix 2, Figure A2.2.16 4.
- 448 occupied units within the study have never been recorded as vacant. The average area for these properties is 247m² and an average Net Annual Value (NAV) of 945 per m², the largest occupied area within the dataset recorded 8,709 m². In total, 110,892.53 m² of commercial space has been constantly occupied within the study area since 2012. Detailed description of NAV can be found in section A2.2.16 in appendix 2.

Figure 2.4a Annual figures of number of Commercial Units and Average Unit Area m², source DLR, (2021)



This study has an important message for those seeking to expand into the town, that there are commercial spaces available in Dún Laoghaire Town Centre. That some of these have not yet been occupied is due to a variety of reasons, most of which are common to many other towns in Ireland including issues of adaptive reuse, lack of awareness of the availability of funding for renovation for adaptive reuse, and in some cases land hoarding. Many of these issues are explored in a recent report: **‘The Town Centre Living Initiative’** which provides a range of recommendations as to how vacant buildings can be brought back in to use. While the focus of this report is on increasing residential use, the recommendations are equally valid for activating upper floors for commercial use.

<https://www.gov.ie/en/publication/86215-the-town-centre-living-initiative/>

Changes in Property Use

- The Geodirectory database recorded an additional 300 addresses to the residential category between 2016 and 2021, consisting of new builds and vacant properties now occupied. The commercial category has seen a small increase of 10 additional addresses. The category of ‘Both’ use saw the second largest increase, with 25 additional units to the database, indicating an increase in residential property, as well as units that contain both residential and commercial uses, while units that are used solely for ‘Commercial’ uses has increased slightly due to the larger demand for residential space.

Tourism and Events

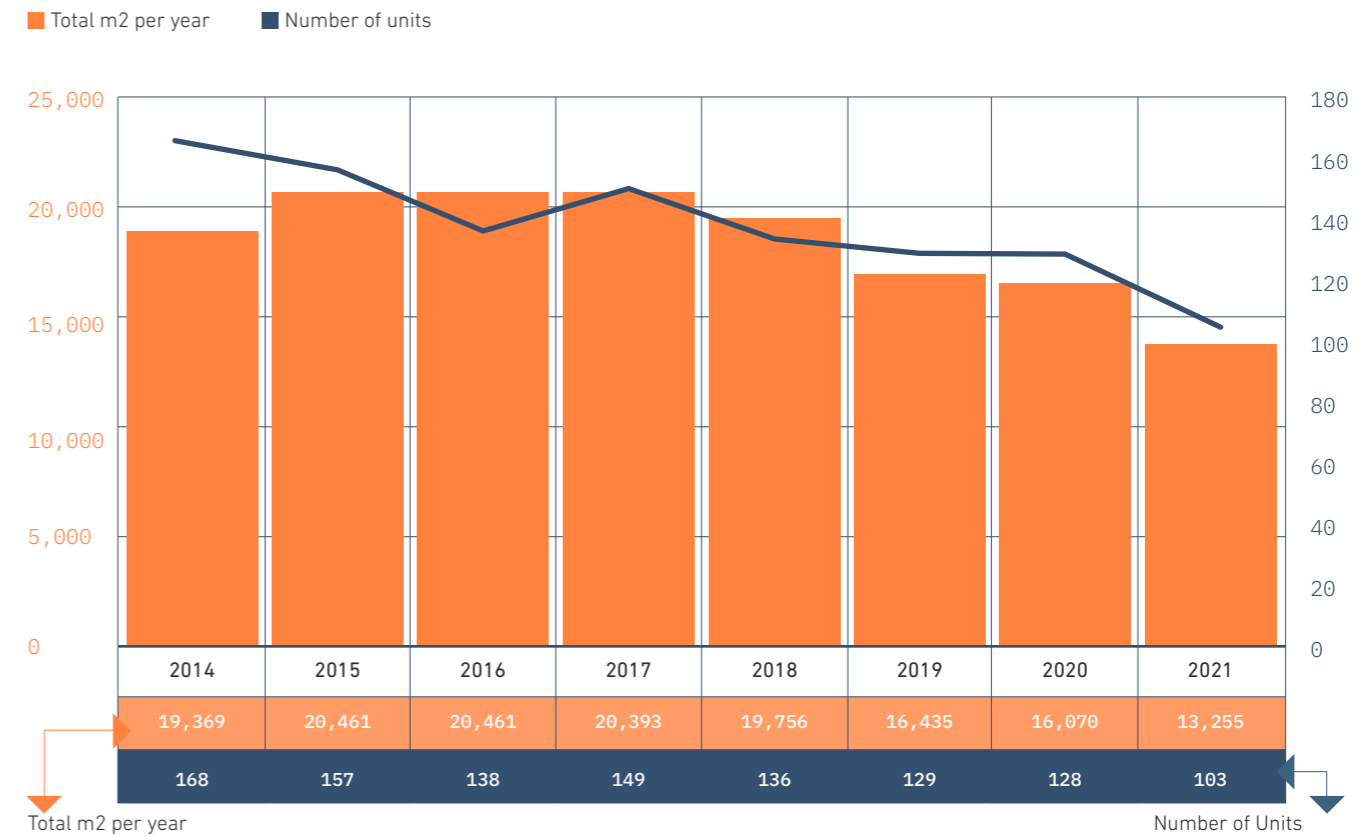
- There are plenty of activities for tourists within Dún Laoghaire town, the harbour hosts a vast range of maritime activities including boat tours. The town centre is home to the Pavilion Theatre, the National Maritime Museum and the stunning dlr Lexlcon, the new Central Library and Cultural Centre opened in 2015, as well as several parks, with Peoples Park hosting a weekly market on Sundays.
- While the harbour has hosted most of the large-scale events over the years in Dún Laoghaire, the town serves to benefit from this with the main hotels in the area being in or close proximity to the town centre.

“There are plenty of activities for tourists within Dún Laoghaire town, the harbour hosts a vast range of maritime activities including boat tours. The town centre is home to the Pavilion Theatre, the National Maritime Museum and the stunning dlr Lexlcon, the new Central Library and Cultural Centre opened in 2015, as well as several parks...”

Community and Business Groups summary

- Dún Laoghaire has an engaged and active community and business network with community groups such as Dún Laoghaire Central Resident Association, Dún Laoghaire Town Team and Dún Laoghaire Tidy Towns.
- The business community is well represented by the Dún Laoghaire Business Association (DLBA) and is further supported by @DigitalDún-Laoghaire.
- New and existing businesses in Dún Laoghaire have access to a wide range of supports and grants from the likes of Dún Laoghaire Rathdown County Council, Dún Laoghaire Rathdown Local Enterprise Office, and Enterprise Ireland.

Figure 2.4b Annual figures of Total Available Commercial Space per year and number of Units, source DLR, 2021)



2.2 Policy and Trends Analysis Summary

“The duty of achieving a sustainable and resilient Ireland lies in the actions of our regions, cities, and towns. The framework for which to realise these aspirations has been laid out all at scales and level. Our National Planning Framework and National Development Plan outline the importance of fulfilling our growth potential...”

Policy Analysis

The recent events and circumstances our societies have been faced with surrounding the Covid-19 pandemic and subsequent health measures has brought with it both challenges and opportunities. While the adversity faced by Ireland and its people in recent times has and continues to have an enormous impact on our society and our lives, in the face of this adversity comes great opportunity. As people across Ireland realise the importance of their towns and sense of place, the opportunity to act upon and realise these shifts in values has never been greater. While our governments and our people adapt to the changing circumstances of how we live our lives, the platform provided by our national, regional, and local strategies can help achieve a sustainable and resilient Ireland, with its cities, towns, villages, and communities forming the foundations from which these transitions can be realised.

The duty of achieving a sustainable and resilient Ireland lies in the actions of our regions, cities, and towns. The framework for which to realise these aspirations has been laid out all at scales and level. Our National Planning Framework and National Development Plan outline the importance of fulfilling our growth potential and achieving critical mass in a sustainable manner. The importance of spatial planning and development towards fulfilling this potential through developing new infrastructure, housing, employment, recreation, heritage, services, and amenities within the existing cities, towns, and villages of Ireland is huge in this pursuit.

These strands are continued through to our regional strategies - the Regional Spatial and Economic Strategies of our three distinct regions; they echo the National Planning Framework in emphasising sustainable development

patterns and seek to focus growth within the footprint of existing urban areas and in key regional growth settlements, while also looking to our regional cities and towns in underpinning this overarching framework for the creation and enhancement of attractive places to both live, work and recreate.

From these national and regional strategies, our county development plans form the backbone of our local strategies. They provide an invaluable framework and context at a local level in helping to achieve the goals and outcomes of our national and regional strategies towards the sustainability, resilience and physical health of our towns, villages, and communities. The Dún Laoghaire-Rathdown County Development Plan aligns with these goals to a fine degree: from the importance designated to the vibrancy of its towns and quality of its public realm to the improvement of its public transport infrastructure and enhancement of its natural amenities and biodiversity, and its smart and sustainable capabilities.

This firm stance taken at all levels on the importance of sustainability, resilience and vibrancy within our towns and villages form the spine from which these national, regional, and local strategies can be supported, implemented, and achieved. The Dún Laoghaire Town Spatial and Economic Study embodies these multi-scalar visions in regenerating the town of Dún Laoghaire to create a vibrant, resilient, inclusive, and healthy urban environment and become an attractive place to live and work. Though the present and future challenges faced by our communities in an uncertain world are significant, the role of our and towns, villages, and communities in rising to these challenges has never been greater.

PESTEL and Trends Analysis

This PESTEL summary highlights key internal and external factors under six thematic areas – Political, Economic, Social, Technological, Environmental and Legal. This analysis highlights both the challenges and opportunities which may shape the future of Dún Laoghaire’s spatial and economic development. The subsequent SWOT (Strengths, Weaknesses Opportunities and Threats) analysis in Chapter 5, is informed by the PESTEL analysis and further analyses these influencing factors.

Political: As Ireland’s population reaches 5 million, much of this population growth and subsequent economic growth has occurred within the five cities of Ireland – predominantly, the Dublin region. In line with the NPF, to ensure that development occurs within the existing boundaries of built-up regions, the Urban and Regional Development Fund (URDF) makes available €2 billion in funding up to 2027 for the growth and regeneration of the existing five cities, key regional drivers and large towns. Given the long-term effects the Covid-19 pandemic and subsequent public health measures have had on the nature of future working arrangements, the Government released the National Remote Work Strategy in January 2021 which aims to both establish future working conditions and attract and retain talent within the Irish workforce.

Economic: While unemployment levels stand at 10% as of September 2021, projected unemployment will continue to decrease to just over 9.25% in Q4 and to 6.5% by the end of 2022¹ as public health restrictions contract. This easing of restrictions, as anticipated, also came with the recovery of economic activity. According to the Department of Finance Budget 2022, Ireland has seen a higher frequency of official (e.g. retail sales) and unofficial (e.g. card payments) data indicating an improvement in economic activity in Q3 of 2021. Contact-intensive services activities resuming at the beginning of the summer was an important tailwind for the domestic economy. As most of the remaining public health restrictions ease towards the end of October, the economic activity should gain further momentum into Q4 and Q1 2022.

Figure 2-5: PESTEL Analysis for Dún Laoghaire town study area



1. Department of Finance – Budget 2022: Economic and fiscal outlook



“With the increase in remote working and the likelihood of remote working being a common trend in the future, coworking spaces or digital hubs in Dún Laoghaire could potentially boost the local economy...”

Social: Population growth has not occurred equally across the country. Dublin had one of the highest county growth rates recorded between 1966 and 2016, with a population growth rate of almost 70%. Population change in Dún Laoghaire-Rathdown was exponential between 1966 and 2016, increasing from 51,772 to 217,274. This is a percentage increase of almost 420%. As the CSO Census 2016 results show, the average age of Ireland's population stood at 37.4 years in April 2016, up by 1.3 years since 2011. Dún Laoghaire-Rathdown, at an average age of 39 years, is the oldest county in the Region and state.

Technological: Undoubtedly the most significant global change experienced in recent decades has been the increasing digitalisation of economic activity. This has implications on both the traditional composition of town centre streets and the dynamics of working arrangements. 2020 also saw this digitalisation increase through the several nationwide and countywide lockdowns, in which retail sectors not deemed essential were forced to close intermittently throughout 2020, which further led to increased digitalised economic activities among both suppliers and consumers. The Government have committed to the National Broadband Study, an initiative to deliver high speed broadband

services to all premises in Ireland. Up to 146,000km of fibre will be deployed as part of the State intervention, aiming to deliver high speed broadband to over 1.1 million people in approximately 540,000 premises across the country.

Environmental: The Council continues to implement its Climate Change Action Plan 2019-2024, in partnership with Codema – Dublin's Energy Agency, the Dublin Climate Action Regional Office (CARO) and other partners. The CCAP was first approved by Elected Members in May 2019 and was subsequently submitted to the Department of the Environment, Climate & Communications in September 2019. The CCAP includes 123 actions in total across the five theme areas of Energy & Buildings, Transport, Flood Resilience, Nature Based Solutions and Resource Management. These actions are broad ranging, have a rolling duration across a five-year timeline, and are generally greater than one year in lifespan. One of the four targets set out in the CCAP was the improvement of the Council's energy efficiency of 33% by December 2020, which has been exceeded. The Council improved its energy performance by 37.2% based on its 2019 return, compared to the baseline year of 2009. This means that dlr has exceeded the 2020 public sector target of 33% energy efficiency, as reported

by the Sustainable Energy Authority of Ireland's Monitoring & Reporting (M&R) System. The Council is also committed to reviewing and monitoring the CCAP, in line with the requirements of the National Adaptation Framework and EU Covenant of Mayors for Climate & Energy processes. The Council recently undertook public consultation on its Draft Biodiversity Plan, which is expected to be adopted in Q4 2021. dlr was also a partner in Dublin's first Climate Action Week 2021, which was organised and delivered by the partnership of Dún Laoghaire-Rathdown County Council, South Dublin County Council, Dublin City Council, Fingal County Council, Codema – Dublin's Energy Agency and the Dublin Climate Action Regional Office (CARO).

Legal: In line with economic and technological trends and associated new ways of working, there are legal implications to be addressed with regards to new working arrangements. With the rise in remote and flexible working, there are many possible impacts which may emerge when an employee works outside of a main office, both positive and negative. While the National Remote Work Strategy provides guidelines towards implementing new working arrangements, more statutory clarity is needed to ensure the integrity of workers and employers rights in returning to the office.

/ DÚN LAOGHAIRE 2040

Economic Trends and Drivers

Trends in employment have changed significantly since the beginning of the Covid-19 Pandemic. Some of these trends, such as changing work practices and technological innovation have the potential to dramatically alter how the Irish economy functions.

Sectoral Shifts: The IDA's strategy for growth and investment is heavily focused on knowledge-intensive employment as the IDA recognises that these sectors have consistently shown agility and resilience and they align with Ireland's capabilities as a high value, high skilled location. Dún Laoghaire having a highly educated population and having three further education institutes located within the study area or in close proximity are in an ideal position to benefit from this trend. Dún Laoghaire have a significant opportunity to capture the demand for knowledge intensive employment and should ensure there is ample commercial space available to meet this demand.

Workplace trends: Multinational Companies will have to factor higher levels of remote working into their locational decisions and the trade-offs that come from locating in urban or regional areas could be altered. Technology adoption will also be accelerated by Multinational Companies, technology such as automation, AI, and digitisation.

Remote working: Following on from a survey conducted in October 2020, researchers from the Whitaker Institute at NUI Galway and the Western Development Commission have published summary data from the second annual national remote working survey in Ireland in May 2021. This survey examined responses from over 6,400 employees. Some of the key findings are that, for those who could work remotely, 95% of respondents were in favour of working remotely some or all of the time which was a significant increase from the previous survey where 83% of respondents indicated the same. To accommodate the changing needs of the workforce, the Irish government supports existing digital hub centres and the development of new ones.



Pace of technology adoption: The pace of technology adoption is expected to remain unabated and may accelerate in some areas and that in tandem with the Covid-19 recession, automation is creating a 'double-disruption' scenario for workers. Although the accelerated technology adoption will drive operational efficiencies and lower costs for companies it this will also considerably alter the nature of work and the profile of skills demand.

Potential for Dún Laoghaire to capitalise on these trends: With the increase in remote working and the likelihood of remote working being a common trend in the future, coworking spaces or digital hubs in Dún Laoghaire

could potentially boost the local economy. As mentioned previously, accelerated technology adoption has its benefits but comes with negatives impacts such as considerable alterations to the nature of work and the profile of skills demand. This presents an opportunity for Dún Laoghaire – Rathdown Council to provide strong support for transformative upskilling and innovative investment for at-risk or displaced workers.

INCREASING DEMAND		DECREASING DEMAND	
1	Data Analysts and Scientists	1	Data Entry Clerks
2	AI and Machine Learning Specialists	2	Administrative and Executive Secretaries
3	Big Data Specialists	3	Accounting, Bookkeeping and Payroll Clerks
4	Digital Marketing and Strategy Specialists	4	Accountants and Auditors
5	Process Automation Specialists	5	Assembly and Factory Workers
6	Business Development Professionals	6	Business Services and Administration Managers
7	Digital Transformation Specialists	7	Client Information and Customer Services Workers
8	Information Security Analysts	8	General and Operations Managers
9	Software and Application Developers	9	Mechanics and Machinery Repairers
10	Internet of Things Specialists	10	Metal-Recording and Stock-Keeping Clerks
11	Project Managers	11	Financial Analyst
12	Business Services and Administration Managers	12	Postal Services Clerks
13	Database and Network Professionals	13	Sels Rep., Wholesale and Manuf., Tech and Scl.Products
14	Robotics Engineers	14	Relationship Managers
15	Strategic Advisors	15	Bank Tellers and Related Clerks
16	Management and Organisation Analysts	16	Door-To-Door Sales, News and Street Vendors
17	FinTech Engineers	17	Electronics and Telecoms Installers and Repairers
18	Mechanics and Machinery Repairers	18	Human Resources Specialists
19	Organisational Development Specialists	19	Training and Development Specialists
20	Risk Management Specialists	20	Construction Laborers

Figure 2.6: Top 20 jobs roles in increasing and decreasing demand across industries, (source World Economic Forum)



Chapter three

SPATIAL ANALYSIS

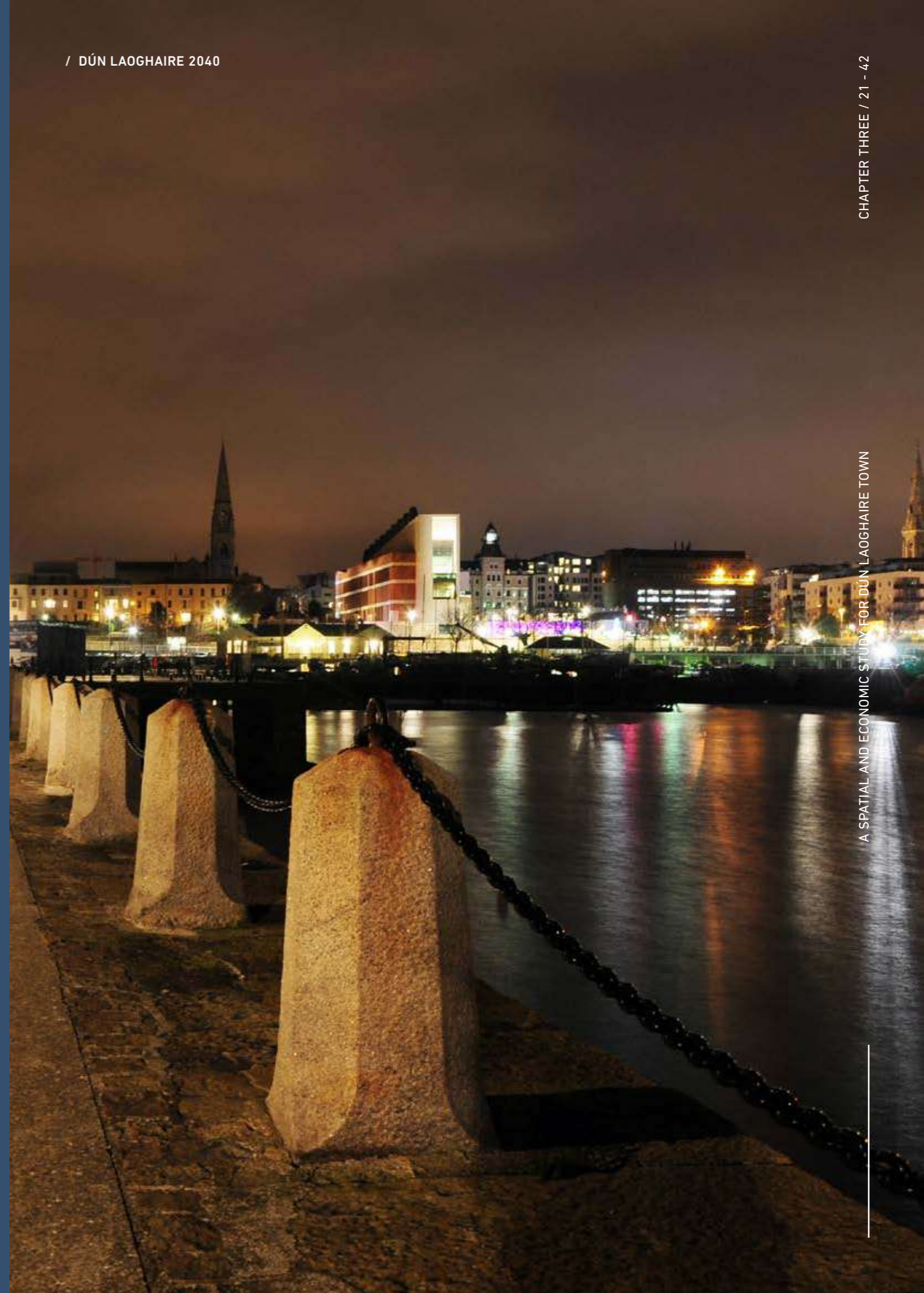
This chapter presents a review of the existing essential attributes and characteristics of Dún Laoghaire as a 'destination of choice' to live, work and visit, focussing on:

Strategic assessment of the existing natural and built heritage character of the town;

Appraisal of the plan led approach to the development of Dún Laoghaire;

Identification of opportunity Sites;

Potential for an Urban Design Guide and Public Realm Strategy.

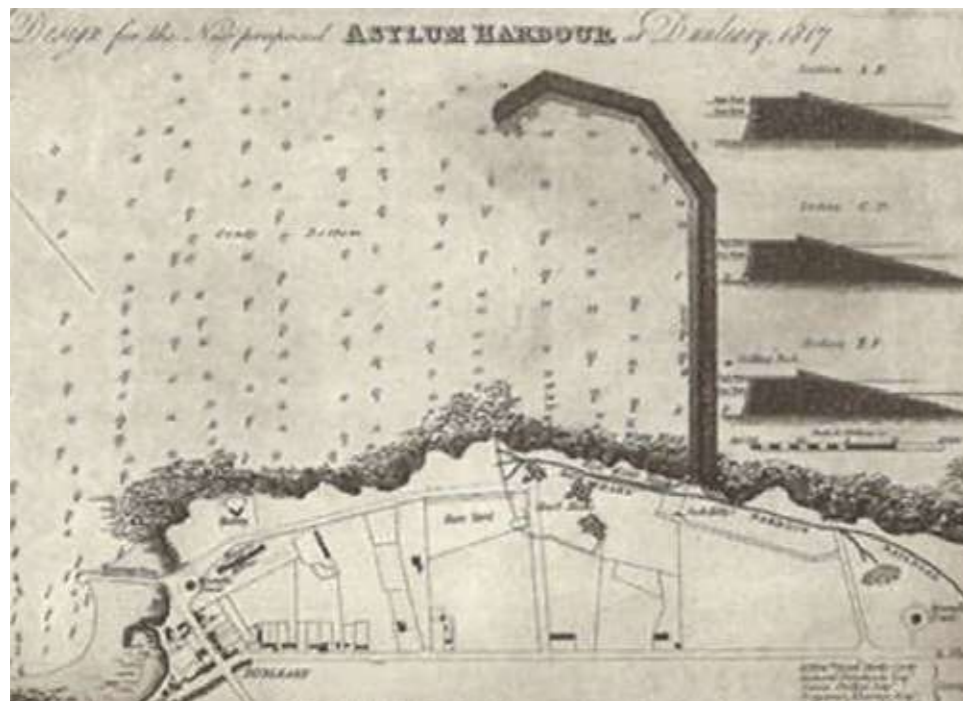


3.1 The Existing Natural and Built Heritage Character of the Town

Dún Laoghaire has an enviable setting, located around 12km south of Dublin city centre, conveniently linked by DART, cycle and bus routes, and with a vibrant and scenic location overlooking Dún Laoghaire Harbour. Since its foundation in around 450 AD, the town has been inextricably linked with the sea. Originally a small inaccessible fishing village known as 'Dunleary' (where the Purty Kitchen is located), the settlement rapidly expanded with the construction of the harbour as a major port to serve Dublin during the early 1800s. The two piers were completed in the 1840s, while other works undertaken to facilitate use as a port included Victoria Wharf in 1837 (now the site of the former ferry terminal), Traders' Wharf in the 1840s and Carlisle Pier in 1859. Following a visit to Ireland by King George IV, and his subsequent departure from the new port in 1821, Dunleary was renamed Kingstown. In 1920 the town was given its present name (the Irish form of Dunleary).

Most of the stone used in the construction of the harbour was quarried at Dalkey, and at two smaller sites now occupied by the People's Park and the dlr Lexlcon library. Marine Road was laid out to transport the stone from the quarries to the coast, together with a railway between Dún Laoghaire and Dalkey, known as 'The Metals' (an old term for an iron railway), which survives today as a popular and recently refurbished footpath and cycleway.

“Dún Laoghaire has an enviable setting, located around 12km south of Dublin city centre, conveniently linked by DART, cycle and bus routes, and with a vibrant and scenic location overlooking Dún Laoghaire Harbour.”



By the 1840s Dún Laoghaire was regarded as 'the most aristocratic suburb of Dublin'. But as recorded in a book by Tom Conlon ('Victorian Dún Laoghaire: A Town Divided'), at least one third of population lived in primitive, overcrowded cabin-type accommodation. Once the construction of the harbour was completed, many of the unskilled workforce of more than 1,000 were unable to find alternative employment and left to live in poverty in the back alleys of the expanding town.

Figure 3-1 Street layout forming part of the 1817 plan for the harbour (source: Tom Conlon)

The completed asylum harbour, the largest in Ireland and the UK, quickly developed as an important centre of trade as well as a fashionable resort for the wealthy citizens of Dublin City. It became the principal port for mail boats throughout most of its history, a centre for recreational sailing, the base for Irish Lights since the 1870s, and the terminus of Ireland's first railway.

The harbour provided the catalyst for the transformation of Dunleary into a vibrant town of Victorian elegance, with formal squares defined by fine terraced houses, two large yacht clubs, hotels, churches and numerous civic buildings. The urban form of the current town centre comprised an integral part of the Studies prepared for the development of the harbour, including the main thoroughfare of George's Street and most of the adjoining residential streets connecting to the waterfront. The prestige and image of the town was further enhanced by royal visits and the presence of large pleasure vessels moored in the bay.

Figure 3-2 1816 Map with route of George's Street Shown (Source: Dún Laoghaire Harbour Heritage Management Plan 2011)



George's Street was laid out as an uncompromising straight line, extending almost 1.5km from the now People's Park in the east to the end of the West Pier at Cumberland Street, and possibly functioning as a military road connecting the two former Dún Laoghaire Martello Towers. By 1900, the centre of the town had become congested and George's Street was widened between Patrick Street and Mulgrave Street, which included the demolition of shop frontages and their replacement by new frontages stepped back around 4.5m, presenting a more spacious character at this end of the town. Shops on the corner of Marine Road and George's Street were also demolished.

Around the same period (1890), the People's Park was established at the eastern end of George's Street on the site of the depleted quarry. Recently refurbished to a high standard, it remains a traditional Victorian-style park, complete with still-functioning tea rooms and the venue for markets and events.

The town centre is still distinguished by many fine examples of Victorian and Regency style architecture, complete with original or restored cast-iron. Although there have been numerous interventions within the traditional urban form, including large scale office and retail developments and the contemporary dlr Lexlcon, the buildings remain typically 2 or 3-storey in height, with some recent and post-war developments of around 4-5 storeys. The town generally continues to present a distinctive compact character, especially when viewed from the harbour, punctuated by the spires of St. Michael's and Mariners' Church (the Maritime Museum), the tower of the County Hall and the 'prow' of the new dlr Lexlcon rising above the overall urban skyline.



Figure 3.3 Compact urban form of the town centre and its relationship with the harbour (Source: Pinterest)

By the 19th century, Dún Laoghaire had become the principal passenger port for ferries between Ireland and Britain, with a frequent service to Holyhead in Anglesey, Wales. Subsequent competition from low-cost airlines and increasing fuel costs resulted in the service being gradually reduced up until 2015 when services were withdrawn from Dún Laoghaire and moved to Dublin Port. In response, Dún Laoghaire Harbour published a master plan in 2011 which promoted Dún Laoghaire as a tourist destination, and since then many cruise ships have visited the port, usually between the months of May and July. The harbour continues to undergo a significant period of transition as it aims to reposition itself as a marine, leisure and tourism destination of international status, fully integrated with the town and the wider coastal hinterland.

“By the 19th century, Dún Laoghaire had become the principal passenger port for ferries between Ireland and Britain, with a frequent service to Holyhead in Anglesey, Wales. Subsequent competition from low-cost airlines and increasing fuel costs resulted in the service being gradually reduced up until 2015 when services were withdrawn from Dún Laoghaire and moved to Dublin Port.”

Whereas the harbour contributes significantly to Dún Laoghaire's distinct sense of place, the relationship with the waterfront has become diminished, primarily by the DART corridor (which was constructed in open cut), and by the growing traffic influences of Crofton and Queen's Road. The resulting physical and perceptual separation between the town and the harbour has been further accentuated by the redevelopment of the ferry terminal in the 1990's, and its associated open space which is isolated from both the Town Centre and the water's edge. The historic connection between Marine Road and waterfront has been similarly compromised by dominant vehicle circulation requirements and the now under-utilised spaces around the terminal.

The waterfront remains the primary amenity of the area, however, offering a wide range of attractions for both residents and visitors. The historic East Pier is extremely popular for walkers, providing panoramic views across the water to the Howth Head peninsula, its northern counterpart, and including a restored Victorian bandstand and the prominent lighthouse marking the entrance to the harbour. Other areas of the harbour offer opportunities for watersports, boat hire and local ferry links. Amenity uses extend in each direction, with coastal pedestrian/cycle routes, beaches, and access to the water, as well as the soon to be completed Dún Laoghaire Baths site. Most recently, The Bike Hub is a new facility located opposite the RNLI station providing cycles which can be used by people with disabilities and upcycle donated bikes for people on low incomes.

Within the town, there are numerous historic buildings, museums and cultural attractions that reinforce Dún Laoghaire as a most desirable place to live, work and visit.



Figure 3-4 Dún Laoghaire Town and Harbour, source DLRC

Figure 3.5 Key Visitor Destinations

- | | | |
|------------------------|----------------------------------|-----------------------|
| ■ Visitor Sites | 1. George's Street | 11. Pavilion Theatre |
| ■ Protected Structures | 2. Royal Marine Hotel | 12. Harbour Plaza |
| ■ Parks/Open Spaces | 3. dlr Lexlcon | 13. West Pier 'Gut' |
| ■ Waterfront | 4. Irish Design Gallery | 14. The Gut |
| | 5. National Maritime Museum | 15. East Pier |
| | 6. St. Michael's Church | 16. Moran Park |
| | 7. Carnegie Library | 17. Newtownsmith Park |
| | 8. County Hall | 18. People's Park |
| | 9. Dún Laoghaire Shopping Centre | 19. Clarinda Park |
| | 10. Dún Laoghaire Baths | 20. Vesey Park |



3.2 The Plan-led Approach to the Development of Dún Laoghaire

Successes of the Plan Led Approach to the Development of Dún Laoghaire

Substantial progress has been made since 2016 in realising many of the strategic objectives of these key themes. The Plan has also been instrumental in providing ongoing impetus for the rejuvenation of the area, for assessing planning applications, for directing public investment and the structure for funding applications. Notable recent achievements have included the construction of dlr Lexlcon, the Metals Projects Phase 1 and 2, public realm enhancement on Main Street, improved connectivity through development of laneways, the Iceland site new street to Georges place and the Harbourmaster site connection to George's Street through the Eblana development, as well as the reinstatement of the iconic roof on the Royal Marine hotel.

On-going work by Dun Laoghaire-Rathdown County Council through initiatives such as public realm enhancement on Main Street, the Metals public realm improvements and the iconic dlr Lexlcon have had significant regenerative effects on the town. The soon to be completed Dún Laoghaire Baths will add to the waterfront offer. The combined input of these projects is seen as an important first step in reconnecting the Town Centre to the amenities of the Harbour and the Waterfront. Significant recent private investment in the town has included renewed redevelopment of the former Iceland site and the conversion to apartments of an office block in George's Place. These schemes will help expand the resident population of the town and create demand for local services.

The Council introduced two schemes in 2014 which have contributed to improving the condition and appearance of the Town Centre - The Occupation of Vacant Commercial Premises Incentive Scheme to encourage the use of vacant commercial premises, and the Shopfront Improvement Scheme aimed at supporting an improvement in the overall appearance of shop fronts and commercial properties. The significant public investments combined with private sector residential development have resulted in the strongest rate of population increase in decades, with expected continued growth.

Progress on the Dún Laoghaire Urban Framework Plan
The dlr lexlcon, strategically located to strengthen the links between the Town Centre and the Waterfront has become fully operational and continues to generate significant footfall in the town.
The Metals Projects Phase 1 and 2 have been completed creating a linear park between the Town Hall and the lexlcon
Works are ongoing at the old Dún Laoghaire Baths site
Work had commenced on a recently granted permission on the old School House Site on Eblana Avenue which will complete the pedestrian link between Sussex Street and Crofton Road
Redevelopment of the former depot site at Georges Place to provide new social housing and plans for a new school site. Completion of upgrades to Kelly's Avenue and stage one of the new pedestrian link through the fire station.
Significant evolution in terms of the residential offer in Dún Laoghaire with change of use of commercial units to individual residential units, multi occupancy units back to single use, use of upper floors for residential and also new schemes on Georges Street and Crofton Road.
Provision of co working spaces on Georges Street.
Delivery of new permeability connections to the surrounding areas including pedestrian and cycle links to the new residential community at Honey Park and Cualanor
Completion of urban realm and placemaking improvements on Haigh Terrace and Georges Street
Restoration and redevelopment of the Peoples Park and completion of the raised promenade adjacent to the Peoples Park



DLR LEXICON

Cultural, leisure and educational facilities within a high-quality contemporary building strategically located to reinforce pedestrian movement between the Town Centre and the Waterfront. It is now Fáilte Ireland's fifth most popular free attraction nationally and features a Municipal Gallery, a Studio theatre, Lexlcon Lab, meeting rooms, over 100 study spaces and a café.



THE METALS, COUNTY HALL TO DÚN LAOGHAIRE BATHS

Creation of a linear park decking over the Dart Railway between Marine Road and the entrance to the Pavilion Car Park and linking dlr Lexlcon and the Town Hall with the recently refurbished People's Park. New pedestrian area, café terrace, small play space and landscaped public space for the Town Centre.



MARINE ROAD – QUEEN'S ROAD

Upgrading of the first section of Marine Road at the junction of Queen's Road has been delivered as part of the Metals Projects Phase, creating a new focal point and setting for the Town Hall, Victorian Monument and the historic restaurant building at the DART Station.



MARINE ROAD

Public realm improvements and additional interim interventions to help reduce the difficulty for pedestrians crossing a complex series of exits/entrances.



PEOPLE'S PARK

Newly refurbished Victorian-style park, including well-maintained gardens, restaurant, tea rooms, fountains and children's play area. Weekend markets with arts, crafts and local produce, and live music and outdoor cinemas during the summer.



OLD DÚN LAOGHAIRE BATHS SITE

Currently under re-construction (anticipated completion Spring 2022), providing enhanced public seafront facilities. Strong amenity connection to Sandycove, and complementing the completed Metals and dlr Lexlcon Environs projects.



**GEORGES STREET –
LIGHTHOUSE –
GEORGES PLACE-
KELLYS AVENUE-
STABLE LANE**

Redevelopment of the former Council Depot providing high-quality mixed residential and a new pedestrian/cycle link between George's Place and Crofton Road.



**DLR COVID-19
RESPONSE:
COASTAL MOBILITY
INTERVENTIONS**

Aimed at promoting and facilitating a dramatic shift to walking and cycling along the strategic coastal transport corridor. Comprising a new 3.6 km section of temporary, segregated 2-way cycleway from Newtown Avenue in Blackrock to Sandycove and the Forty Foot bathing area.



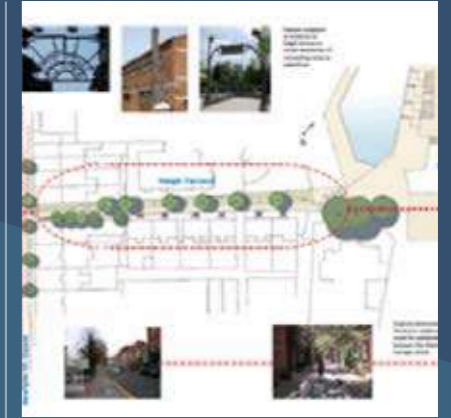
**DLR SUMMER
STREETS INITIATIVE**

Involving the reallocation of existing public realm spaces through pedestrianisation of George's St. Lower and the use of additional outdoor space at Myrtle Square.



**MYRTLE
SQUARE AND
CONVENT LANE**

Creation of a new pedestrian space in front of Bloomfield's Shopping Centre, and with public realm works extending the full length of Convent Lane to the junction with Convent Road. The project aims to stimulate a vibrant streetscape which will encourage footfall in this location and throughout the town centre. Received Part 8 planning in January 2021.



**HAIGH
TERRACE**

With the completion of the dlr Lexlcon, Haigh Terrace has evolved as an important link between George's Street and the Waterfront. The main entrance to the dlr Lexlcon is located along this route and addresses the newly developed civic space outside the Mariners' Church. Public realm proposals are currently at Preliminary Design stage.



- 1 The Waterfront and St. Michael's Wharf – Concept ideas by DLR
- 2 The Metals – completed
- 3 The Baths site – under construction
- 4 S2S Promenade and Cycleway – Development Plan Objective, two-way segregated cycleway built between Blackrock and Sandycove
- 5 People's Park – completed
- 6 Haigh Terrace - Completed
- 7 Royal Marine Hotel and dlr Lexicon environs - Lexicon completed and UFP objective to further enhance environs
- 8 Development of new street between Marine Road and Haigh Terrace – UFP Objective
- 9 Marine Road and St. Michael's Place – Completed
- 10 George's Street Lower – temporary pedestrianisation undertaken as part of County Council's 'Summer Streets' initiative
- 11 Myrtle Square and Convent Street – Part 8 plans currently being implemented
- 12 George's Street/Stable Lane – UFP objective to provide link to waterfront and mixed use educational facilities



Figure 3.6 Existing Urban Framework Plan Initiatives

THE URBAN FRAMEWORK PLAN APPROACH

The Dún Laoghaire Urban Framework Plan (UFP) sets out a clear and coherent vision to assist and guide the ongoing development that will contribute to the physical regeneration of Dún Laoghaire Town and address the disconnect between the harbour and the waterfront. The Framework Plan is structured around the following key inter-related themes:

Figure 3-7 Interim Dún Laoghaire Urban Framework Plan Themes



1. RECONNECTING THE TOWN CENTRE TO THE WATERFRONT

Through targeted interventions that include:

The Waterfront

Marine Road

Public Spaces

The Royal Marine Hotel

Haigh Terrace and Park Road

Crofton Road to Sussex Street

The Hospital and Boylan Centre

2. PLACE MAKING AND CREATING VITALITY

Supporting the commercial activities of the Town, particularly along George's Street

Creation of an 18hr economy

Increasing the residential population, including student accommodation, to create demand for local services

Developing the Waterfront as a marine, leisure and tourism destination and creating a high-quality public realm

Redefining George's Street Quarters and The Waterfront

3. STRENGTHENING LINKS WITH ADJOINING AREAS

Strengthening and promoting improved connectivity between Dún Laoghaire and its adjoining Villages, particular for pedestrians and cyclists

Development of a coastal pedestrian/cycle route as part of the proposed Sutton to Sandycove (S2S) Cycleway

Cycling and walking links along Crofton Road and Seapoint Avenue, connecting Dún Laoghaire to Blackrock

Amenity pedestrian/cyclist connection along Queen's Road and the Old Bath's Site to improve linkages between Dún Laoghaire and Sandycove and Glasthule Villages

Further corridors linking Dún Laoghaire Town Centre with emerging neighbourhoods in the immediate hinterland, including Honeypark and Mounttown

The Framework Plan is focussed around reinforcing George's Street as the premiere retail and commercial thoroughfare of the town centre and the importance of Marine Road as the principal spine linking the town to the waterfront. The plan emphasises the change in character along George's Street through the definition of four distinct Quarters, each with their own challenges and opportunities.

It is intended that each Quarter will build upon the natural strengths and qualities of the individual area, both physical and social, supported by general planning policy and by public realm interventions. Specific objectives and aspirations for strengthening the character and use of each Quarter are set out clearly in the Framework Plan.

Figure 3.8 George's Street Quarters



- Town Centre:** Bloomfield's Shopping Centre to Corrig Avenue, the northern part of Patrick Street and the central part of Marine Road
- Park End Quarter:** George's Street Upper, east of the Town Centre
- Seafront Quarter:** Marine Road to Crofton Road/ Queen's Road (Hospital car park to the dlr Lexlcon)
- Old Town Quarter:** George's Street Lower, west of the Town Centre.

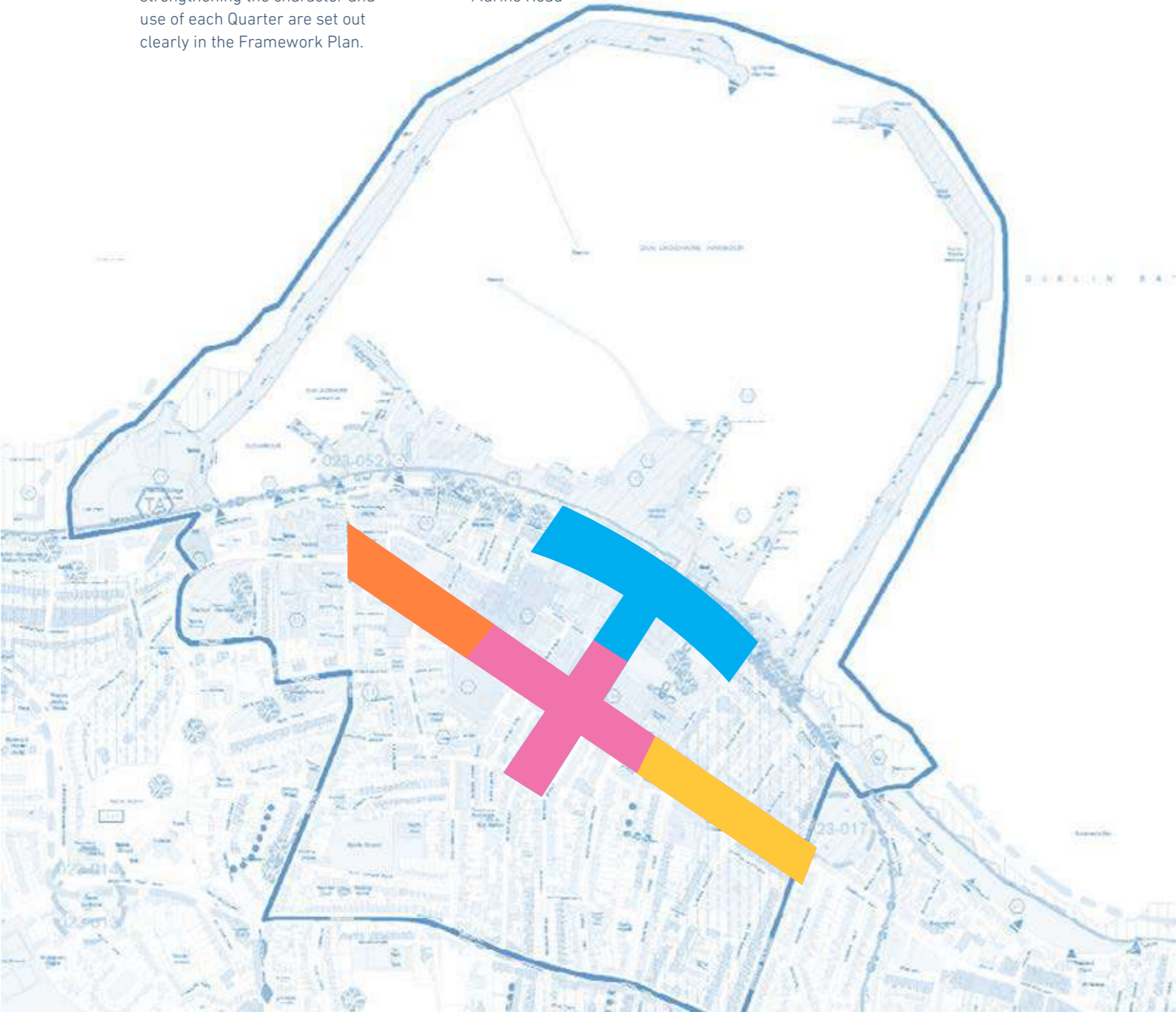


Figure 3.9 Sketch ideas for the Harbour Plaza Site, source DLR Architects

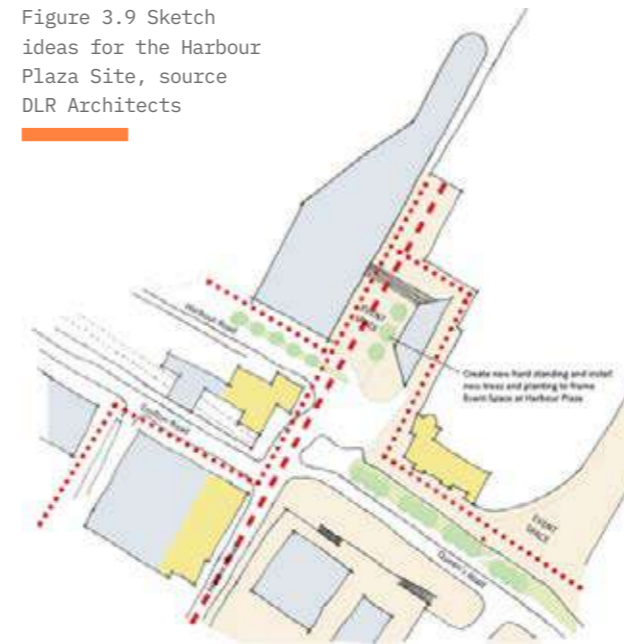
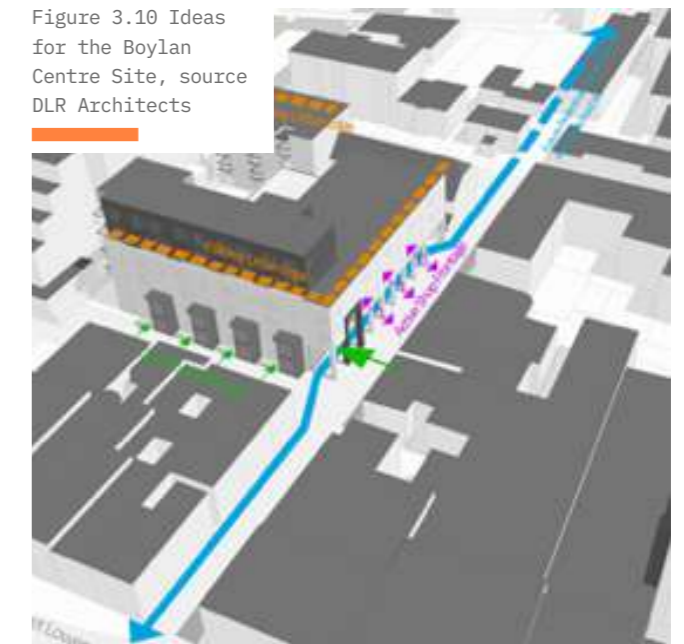


Figure 3.10 Ideas for the Boylan Centre Site, source DLR Architects



Notwithstanding the numerous achievements that have been delivered to date, the Urban Framework Plan recognises that significant challenges remain. Large tracts of town centre land and several substantial buildings remain underutilised. The overall residential density is low, and areas of the town lacks vitality and activity. There is a lack of affordable housing either to rent or buy. There has also been an overall decrease in commercial office/retail floor space available for employment uses, as discussed earlier in Chapter 2.

The Framework Plan and the recommendations of this study indicate that these issues should be addressed by seeking an appropriate intensity of development and uses for the residual redevelopment lands; in pursuing suitable redevelopment opportunities for derelict and under-utilised sites; and protecting key sites for future commercial use.

The Urban Framework Plan identifies several other future projects and initiatives to help deliver the strategic objectives of the plan and to emphasise the character and build upon the strengths of the defined Town Centre Quarters. Measures outlined in the Plan include:

- **Development of public space at the northern end of Marine Road next to Victoria Wharf:** creation of a focal point for the community, a place to gather, to stop and meet, or just to watch the world go by, with provision for events that encourage increased dwell time by visitors.
- **Redevelopment of the Victoria Wharf site currently occupied by a car park:** needed to restore the visual connection between town and the waterfront and help to promote improved engagement with harbour-based marine activities.
- **New public spaces:** at the junction with Marine Road and Eblana Road adjoining the former Senior College and St Michael's Church, and at the junction of Marine Road and George's Street Lower where the underused Church space could be redeveloped and upgraded to provide an attractive civic space and to provide a more appropriate setting for St Michael's Church.
- **Enhancing the Marine Road streetscape:** improving the frontage (through enhanced landscaping and entrances) and relationship of the shopping centre and the Church to the public realm, and creation of a narrower tree-lined carriageway with wider paving, improved surfaces, and new public lighting.
- **Further development of a new street between Marine Road and Haigh Terrace:** along the frontage of the Royal Marine Hotel and incorporating development to the rear of the Shopping centre, over the carpark entry road and ramps.
- **Upgrade of the existing landscape and environs of the Royal Marine Hotel:** to complement the design standard achieved at the dlr Lexlcon.
- **The potential to prioritise pedestrian and cycle movement along Park Road:** to create improved linkages between George's Street and the Waterfront along the edge of the People's Park.
- **Completion of a pedestrian link between Sussex Street and Crofton Road:** to allow direct access from the town centre along Sussex Street to the DART and bus interchange, providing an important catalyst for regenerating this area of the Town.
- **Redevelopment of the hospital lands, the Boylan Centre and the former VEC building on Eblana Avenue:** to include retention of existing hospital and community uses together with a mix of complementary uses, a network of new streets and public spaces with a tight urban grain, variety in architectural language and design and unit sizes to encourage variety of uses and functions.

- **Upgrades to the public realm along Georges Place:** building upon the success of the redevelopment of the former Council Depot in providing high-quality mixed residential, to include traffic calming, extensive tree planting, pollinator planting schemes, creative water attenuation, wider paving, improved surfaces and new public lighting to create a stronger sense of place.
- Strengthening the changes in character of the defined 'Quarters': this will include, for each quarter, public realm improvements that significantly increase street trees and planting, create narrower carriageways with wider paving, improved surfaces and new public lighting.
- **Town Centre Quarter:** to consolidate the retail and commercial heart of the town, and with proposed measures that include:
 - From Corrig Avenue to Marine Road - trees, new planting, where feasible, in order to rescale the frontage of the shopping centre, and reduced carriageway widths to create easier crossing points for pedestrians and to complement the proposed new public space at the corner of St. Michael's Church.
 - Marine Road to Bloomfield's Shopping Centre – potential pedestrianisation of the one-way stretch of George's Street Lower between Marine Road and St Michael's Hospital; upgraded laneways and new links with Georges Street.
- **Park End Quarter:** to reinforce the character of the two individual areas:
 - People's Park to Clarinda Park West and George's Street Upper - new street trees and furniture, where feasible, together with improved shopfronts and signage; residential activity at above ground floor level to be supported and encouraged.
 - Clarinda Park West to Haigh Terrace: further planting and additional trees, where feasible to assist in creating a better sense of scale; narrowing the carriageway, creating areas for parking and set down, and with new lighting and wider footpaths.
- **Seafront Quarter, Marine Road to Crofton Road/Queen's Road and the DLR Baths:** provides an important link in the connection of the Waterfront and the Town Centre, together with proposed new routes to Sussex Street, that can be reinforced and enhanced by prioritising pedestrian and cycle usage along the Waterfront, finalising of the Dún Laoghaire Baths site, and linkage of the People's Park and Park Road across the raised promenade by means of cascading steps reinforcing linkages between the town and harbour.
- **Old Town Quarter:**
 - Examining the pedestrianisation of George's Street Lower from St Michael's Church/Marine Road to St Michael's Hospital – to encourage increased footfall, building on the success of the Summer Streets initiative, and provide further opportunities for cafes, restaurants and outdoor seating; enhanced shopfronts in a Victorian style to complement the high-quality architecture at first floor level.
 - Bloomfield's Shopping Centre to Library Road – implementation of the Myrtle Square public realm improvements will provide a much-needed landmark plaza for the town, a space to linger, congregate and hold community events with new trees and seating; improvements to Convent Lane provides further opportunities for intensifying mixed uses, such as independent retail, cafes and small restaurants, and/or live work units on the ground floor with apartments over.
 - Library Road to Cumberland Street: re-purposing of the former Dún Laoghaire Library, including residential use at upper floor level, combined with landscaped public space along its frontage, improved shopfronts and signage.



Figure 3.11
George's Street
Pedestrianisation,
source: DLRCC

Strengthening Links with Adjoining Areas

The Urban Framework Plan concludes with future initiatives for strengthening the role of the Town Centre by creating new or improved physical links for cyclists and pedestrians to the Waterfront, to Blackrock, Monkstown and Glasthule Villages, and to the wider residential hinterland, including the new residential development at Honeypark.



Figure 3.12
Enhancing mobility
and liveability
along the
coastline, source
DLR Architects

“There are several vacant or underutilised ‘opportunity’ sites within the study area, including commercial units, which have the potential to significantly revitalise the urban core if brought back into daily use”

3.3 Opportunity Sites

There are several vacant or underutilised 'opportunity' sites within the study area, including commercial units, which have the potential to significantly revitalise the urban core if brought back into daily use. These 'opportunity sites' include the Former Carnegie Library Building, the Old Fire Station and Former Council Offices at No. 9 Georges Place, amongst other significant locations in public ownership, and are described in Table 3.1 and illustrated on Figure 3.13.

Several other sites in private ownership were also identified, which may be considered by Dún Laoghaire County Council for designation as upgraded commercial or mixed uses, rather than solely residential purposes. These sites include:

- Dunnes Stores Block, East Dún Laoghaire. Several vacant buildings are in the ownership of Dunnes Stores who have been reviewing options over the past number of years.
- Empty/Non-Specialised Retail, Georges Street. There are several vacant buildings on George's Street Upper and Lower which have significant potential for use as retail or commercial use (e.g. enterprise centres) or a combination of both.
- Tramyard Motors, Bentley Villas;
- Warehouse, Brocks Lane; and
- Tedcastles, Dun Leary Hill.

“It is equally important to safeguard existing commercial sites for future employment purposes (office and retail), thereby securing jobs that attract people to the town centre and which will in turn support the viability of local independent retail and hospitality businesses.”

The Urban Framework Plan seeks to develop the residential population of the area, thereby creating demand for local services while also building upon the cultural, leisure and educational opportunities that have already been delivered. It is equally important to safeguard existing commercial sites for future employment purposes (office and retail), thereby securing jobs that attract people to the town centre and which will in turn support the viability of local independent retail and hospitality businesses. In this regard, provision of larger retail floorplates in the Town Centre Quarter and between Corrig Avenue and Library Road should be supported and encouraged in order to expand the range of available unit types and sizes and so help to strengthen the overall retail offer, mix and vitality of the Town Centre. Other key opportunity sites include Sussex Street (large floor plate use), Brocks Lane, former factory (large floor plate use), and Bentley Villas, Tramyard Motors (prominent corner redevelopment). Some sites may be suited to uses other than commercial/retail, such as education, as outlined in Project 6.

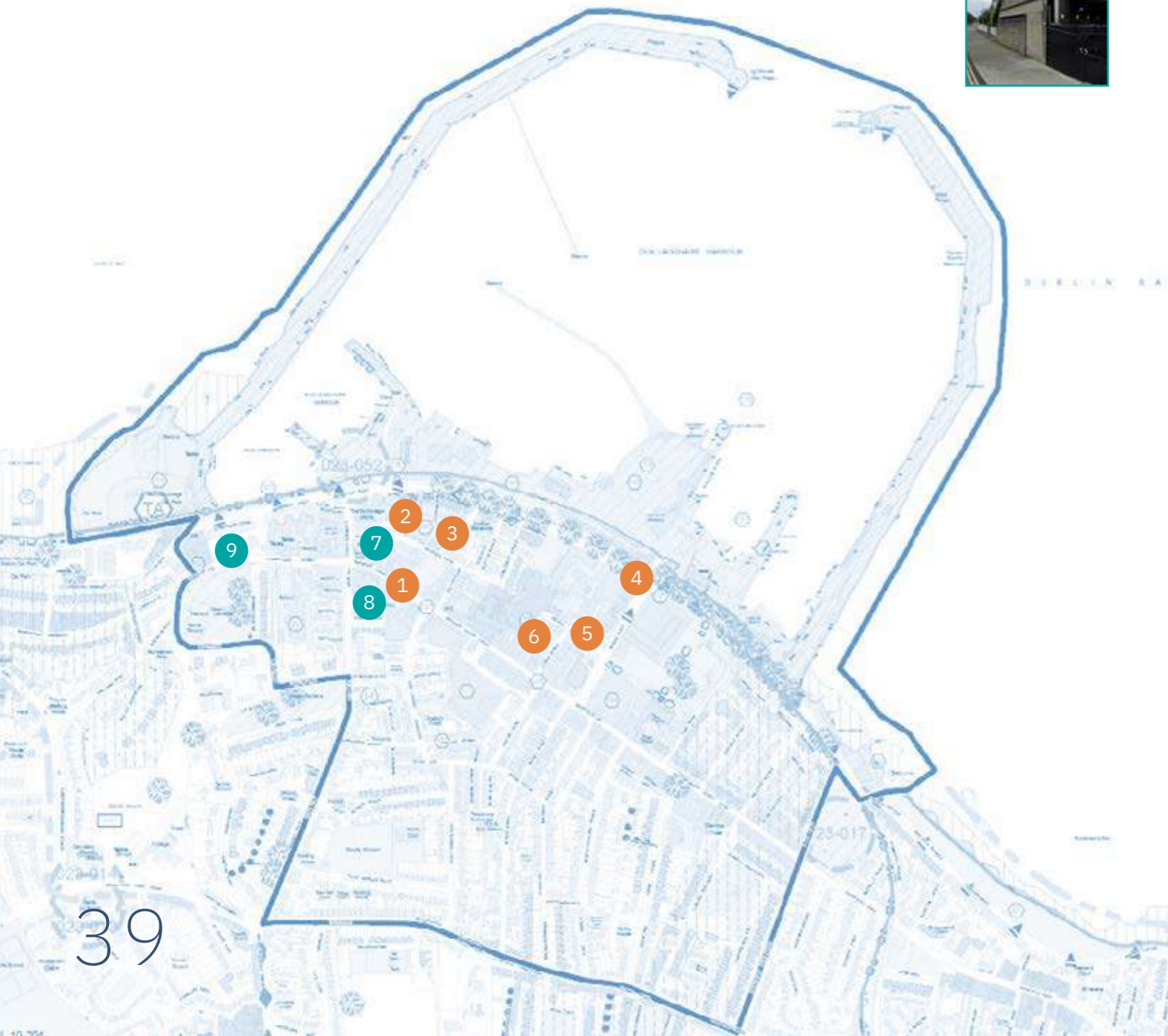
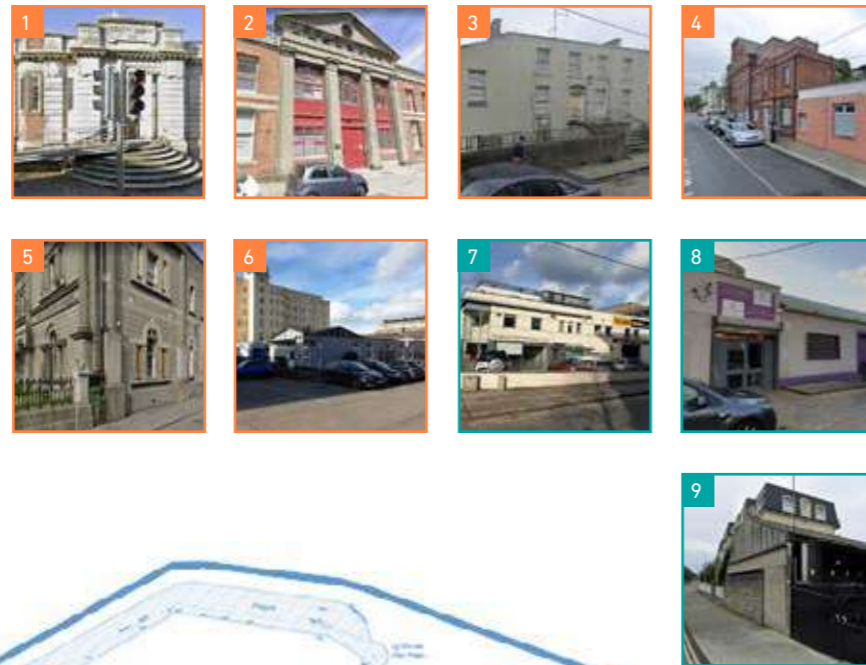
Table 3.1 Vacant and underutilised town centre sites in public ownership

Location	Ownership	Comment
Former Carnegie Library Building – corner of Library Road & Lower Georges Street, Dún Laoghaire	Public	There are no current plans for the possible future re-use of this building which is a “Protected Structure” in the County Development Plan 2016 to 2022 – Record No. 680 refers. The Members have previously expressed their views that any future use of the building was to be “community” based. It should be noted that any proposals for re-use of the building considered by the Executive would be the subject of a report to the Members. If a possible disposal of the building was to be considered, it would require the approval of the Members in accordance with the provisions of Section 183 of the Local Government Act, 2001. This building is in a reasonable condition. Significant works have been carried out to the roof of the building in order to protect the fabric of the building. This building is vacant since the opening of the dlr LEXLCON in 2015.
Old Fire Station & No.10 Georges Place, Dún Laoghaire (these buildings are joined)	Public	The disposal of these buildings and yard at rear to the Department of Education for the proposed development of an Educate Together School was approved by the Council in December 2020 - Minute No. C/626/20 refers. The façade of this building is a “Protected Structure” in the County Development Plan 2016 to 2022 – Record No. 528 refers. Except for the façade, the remainder of this building is to be demolished in conjunction with the proposed development of the Educate Together School on the site. The Fire Station is vacant since Q4 2018/Q1 2019. No. 10 Georges Place was formerly utilised as Offices for Housing Maintenance operations when Georges Place was an operations depot. The building is currently in poor condition. However, it is secured pending its demolition in connection with the proposed development of the Educate Together School on the site. No. 10 Georges Place is vacant for more than 10 years.
Location	Ownership	Comment
No. 9 Georges Place, Dún Laoghaire (Formerly Offices for Council Depot)	Public	There are no current plans for the possible future re-use of this building which is a “Protected Structure” in the County Development Plan 2016 to 2022 – Record No. 1958 refers. It should be noted that any proposals for re-use of the building considered by the Executive would be the subject of a report to the Members. If a possible disposal of the building was to be considered, it would require the approval of the Members in accordance with the provisions of Section 183 of the Local Government Act, 2001. This building is in reasonable condition. The interior of the building has recently been cleaned out. Works are due to be carried out to improve the appearance of the exterior of the building as soon as Level 5 restrictions are eased to allow such works to be carried out. This building is vacant since 2013.
Park House, 66 Lower Georges Street, Dún Laoghaire (on the corner with Park Road).	Public	The Housing Department is currently carrying out investigations in relation to the possible re-development of this building for Social Housing, with a commercial use of the ground floor to be incorporated into the proposed development. This building is in relatively poor condition. Most of this building is vacant for more than 10 years. The ground floor was used as a Pop-Up shop for periods in recent years.
Old Senior College, Eblana Avenue	Public	This building is owned by the Department of Education and will become vacant once Educate Together transfer to the former fire-station on George's Place
Boylan Community Centre, Sussex Street	Public	This key town centre site is currently underutilised and would suit a mixed-use development.

Figure 3.13 Opportunity sites in Dún Laoghaire town centre

- Public Sites
- Private Sites

1. Former Carnegie Library Building
2. Old Fire Station + No. 10 Georges Place
3. No. 09 Georges Place
4. Park House, 66 Upper Georges Street
5. Old Senior College, Eblana Avenue
6. Boylan Community Centre
7. Tramyard Motors, Bentley Villas
8. Warehouse, Brocks Lane
9. Tedcastles



3.4 Potential for an Urban Design Guide and Public Realm Strategy

“Promoting the importance of design in creating a distinct a sense of place, from both the Public Authorities and the wider business and residential community perspectives”

It is proposed that the Dún Laoghaire Urban Framework Plan can be supplemented with an Urban Design Guide and Public Realm Strategy that builds upon the identified projects and initiatives and incorporates the findings of both this Spatial and Economic Study and the Economic Plan for the Harbour. This could be a standalone document providing urban design and public realm guidance in an easily understandable and inspirational format, that:

1. Improves the perception, image and visual quality of Dún Laoghaire Town Centre.
2. Unifies development proposals to increase the physical coherence of the Town Centre and its relationship with the harbour.
3. Achieves a high-quality urban environment that is responsive to the surrounding natural and heritage context.
4. Creates a shared vision between the Council, potential development partners and wider community stakeholders.
5. Presents an integrated design approach for the purpose of funding applications.
6. Achieves high standards of sustainable design (e.g. materials, natural resources, energy provision, landscaping and green spaces) and the integration of biodiversity into good design.
7. Sets urban quality thresholds.
8. Provides a robust framework for longer term investment.
9. Generates market interest.

Key Objectives of the document:

- Promoting the importance of design in creating a distinct a sense of place, from both the Public Authorities and the wider business and residential community perspectives.
- Identifying and developing leading edge projects that create synergies between the Town Centre and the Waterfront, both in built form and high-quality people spaces.
- Setting out clear mechanisms and policies for achieving good urban design, including strategies, competitions, exhibition centres, masterplans, public consultation and guidance documents.
- Defining urban design principles for the Town Centre to inform site development briefs and public realm improvement schemes, having regard to existing proposed development strategies and initiatives.
- Achieving best practice in sustainable design construction techniques (e.g. using BREEAM and CEEQUAL Standards) including the encouragement of appropriate renewable energy technologies.
- Establishing strategic objectives and guidelines for regeneration projects that extend and intensify the town centre in the context of national policy objectives for compact, smart and sustainable growth.
- Ensuring places which attract a broad cross section of people for different reasons.
- Progressive thinking on blending

- innovative design which safeguards the historic and cultural heritage.
- Recognising the importance of green spaces, the natural environment and the enhancement of local biodiversity in relation to landscaping and the public realm.
- Strengthening a neighbourhood-based approach by building-upon the character and strengths of identified Town Centre Quarters.
- The linking up of key-note projects and improvement across the townscape.
- Embracing the shifting relationship between vehicle transport and pedestrian realm.
- Continually raising aspirations of the community and local authority sectors.
- Demonstrating visible and tangible change, accompanied by marketing and promotion of the place.

“Identifying and developing leading edge projects that create synergies between the Town Centre and the Waterfront, both in built form and high-quality people spaces”

>> Potential for an Urban Design Guide and Public Realm Strategy

“It is proposed that the Dún Laoghaire Urban Framework Plan can be supplemented with an Urban Design Guide and Public Realm Strategy that builds upon the identified projects and initiatives and incorporates the findings of both this Spatial and Economic Study and the Economic Plan for the Harbour”

The Urban Design Guide and Public Realm Strategy, although structured in two sections, could be developed together into one coherent document.

The aim of the Public Realm Strategy is to:

- Guide the enhancement, management, use and development of the public domain in collaboration with all stakeholders;
- Strengthen and enhance the attributes which contribute to the distinctive physical and social character of the Town Centre;
- Improve the experience for the pedestrian by enhancing public spaces, reducing the dominance of the motor vehicle and promoting a sense of place in the town centre
- Incorporate the principles of universal, inclusive and age friendly design into the scheme
- Minimise on-street clutter
- Introduce an appropriate and consistent palette of materials
- Ensure that the interests of all users are considered;
- Set out co-ordinated projects/priorities that will enhance and improve the way the town functions and is experienced.
- Ensure that public realm design contributes to the overall liveability and sustainability of the town and embraces the concepts of urban greening and nature-based solutions.



The Public Realm

Strategy should include:

Study Area Vision & Strategy

- **Appraisals:** An analysis and understanding of the study area and the findings of the consultation and engagement process.
- **Vision Statement:** An agreed vision of place to set out a masterplan of spatial interventions to inform the future approach to public realm. This will be a key output, which will inform and guide all future public realm developments within the Town Centre. It should identify key projects to be progressed within a defined timeframe and phasing which will be progressed through the Framework & Delivery Strategy.

Design, Activity & Delivery Manuals

- **Design Manual:** This is to establish design guidance for all elements of the public realm to inform the more detailed stage of design for individual buildings and spaces. The Manual should include design specification, specification on installation, use and maintenance/replacement requirements where appropriate. It should cover appropriate hard and soft landscaping, surface materials, street furniture, utilities, wayfinding/branding, the use of public art and appropriate location of public art including street art. Details on procurement, materials sourcing and provision of spares to be provided where specialist items are identified. Guidance on soft landscaping should take account of the 'All Ireland Pollinator Plan' and the need to minimise maintenance input.
- **Activity Manual:** This is to indicate where and when various activities will be actively promoted including street cafes, trading pitches, markets, festivals, events and street performances and guidance on public art.
- **Framework & Delivery Strategy:** This is to identify public realm and urban amenity projects that:
 - Complement existing and future DLR project measures, especially the Harbour Masterplan.
 - Improve liveability/quality of life, sustainability and the quality of the urban environment, encourage greater town centre living, enhanced recreational spaces and attractiveness from a cultural, tourism and

promotional perspective.

- Provide mechanisms for delivery including a collaborative approach towards the delivery of co-ordinated projects/priorities.
- Provide mechanisms for the future management/maintenance of public realm.
- Provide mechanisms for delivering quality design in projects proposed under the Urban Design Strategy.

Other considerations to address in the preparation of the Strategy include:

- **Increased opportunities to re-allocate road space** for public transport, walking and cycling, to reduce traffic movements in the Town Centre, including for the reduction and/or reallocation of on street car parking.
- **Responding creatively** to the character of the town including its distinctive natural built and cultural heritage.
- **Strengthening the image of the town** and its tourism function.
- **Exploring opportunities to re-invigorate public realm areas**, to create new space or re-function old space, that contribute to place making, regeneration and the development of areas in the town.
- **Developing opportunities for linkages through public realm areas** to identified regeneration areas and key opportunity sites within the town and harbour and to residential and employment areas.
- **Incorporating accessibility**, universal design and public safety considerations.
- **Promoting health and wellbeing** and Dún Laoghaire as a Healthy, Child Friendly and Age Friendly Town.
- **Linking public realm initiatives to climate action**, opportunities for the greening of the town and for green design features such as measures for the control of surface water run-off, to enhance biodiversity or to promote a varied streetscape.
- **Ensuring quality of appearance** and durability/sustainability of materials/street furniture.
- **Incorporating preventative measures** to avoid anti-social behaviour in the public realm, and opportunities to enhance public realm at night.
- **Developing indicative cost of delivering projects**, potential joint initiatives and funding opportunities.
- **Identifying opportunities that provide quick wins** or temporary solutions as part of the public realm delivery strategy.

Chapter four

CONSULTATION AND ENGAGEMENT



This chapter summarises consultation undertaken to inform this study. This includes the outcome of online surveys that were prepared to capture the views of the resident and business community in Dún Laoghaire.

CONSULTATION AND ENGAGEMENT



821

responses to community survey



188

responses to business survey



25

targeted stakeholder interviews

To seek the input of the resident community and the business community two surveys were issued in February 2021 for a period of four weeks.

A total of 821 responses were received for the community survey and 188 responses for the business survey; each demonstrating the depth of interest and engagement with the perceived issues, solutions to address issues, and possible interventions required. Targeted strategic conversations were also held with a range of key stakeholders, listed in Appendix 1, to elicit their views on ways in which the economy of Dún Laoghaire could be revitalised. Together these have provided valuable insights for the study.

RESPONDENT PROFILES 46% of respondents were between 45-64 years of age, 31% were aged between 25-44 years and 20% were aged 65 years of age or over

50% of the respondents have been living within Dún Laoghaire for more than 20 years

EMPLOYMENT 33% of respondents work within Dublin City

A majority (65%) indicated they would like to work from home on a more regular basis

51% of respondents that are in the workforce stated they are working their normal hours from home in 2020/2021

COMMUNITY USE AND PERCEPTIONS OF THE TOWN The most common reasons for people to visit Dún Laoghaire daily are for recreational purposes associated with the harbour and park, and for top up shopping. Those visiting the town on a weekly basis are most likely to be visiting for recreational purposes associated with the park or harbour, or for food and grocery shopping. 30% of respondents would go to a restaurant in the town once a week. Those visiting monthly are most likely to be seeking clothing or other larger items or for town centre services such as hairdressing, banking or healthcare.

Over 60% either agreed or somewhat agreed with the statement 'I have spent more money locally on goods and services in Dún Laoghaire in 2020 than I did before the onset of the pandemic'. This is an important point in that it aligns with research from the UK's High Streets Taskforce indicting town centres have benefited from people working from home during lockdown.

When asked what services, facilities or activities not currently provided for in the town they felt were needed, respondents highlighted more high-end retail and grocery (25%), food and drink (13%) and sporting activities (12%) and parking and transport (12%).

KEY PRIORITY AREAS When asked what they feel are Dún Laoghaire's greatest assets by ranking those they feel are most significant, respondents highlighted Dún Laoghaire harbour / seafront, Recreational and leisure facilities, Attractive public spaces, Accessibility, Diversity of town centre, Sense of community, Proximity to Dublin City centre, Town Centre character and identity. This clearly shows the inter-relationship between the town and the harbour. This reinforces the importance of considering the town and harbour together in any strategic approach.

When asked what they feel are Dún Laoghaire's biggest challenges, issues or concerns by ranking those they feel are the biggest challenge, respondents clearly identified town centre vacancy levels [it is noted that these responses were received at the beginning of 2021, with many vacant premises now filled] with the second biggest issue for the town being the lack of a distinct town identity.

Respondents were asked what key objectives they would prioritise to generate growth in the town ranked in order of priority. The responses indicate that the top four key objectives for the town should be attracting more business to the area, addressing commercial vacancy, and enhancing and integrating the harbour area, and supporting existing local businesses. Attracting more people to live or visit the area was considered a lower priority.

4.1 Community Survey

CO-WORKING CENTRES

The rationale for including questions on co-working centres is to establish interest and demand in such centres and whether development of these should be a focus for stimulating increased footfall in the town. Respondents were asked if there is a need for greater provision of co-working space / shared meeting rooms in Dún Laoghaire. 39% believe that there is a need for greater provision, 20% indicated the opposite and 41% were uncertain.

Respondents were asked if a range of high quality co-working spaces were available, would you decide to work from Dún Laoghaire instead of/in addition to your regular place of work. 32% would not work from Dún Laoghaire, while 26% would. 27% indicated they were uncertain, and 15% indicated that their job does not allow for remote working.

Respondents were asked to identify how many days per week they would work from such co-working space in Dún Laoghaire. The most responses were given to 1, 2 and 3 days, with 34% would work 2 days a week, 32% would work 1 day a week, and 24% would work 3 days.

VISION FOR THE FUTURE

Respondents believe the making the town centre more vibrant, with an enhanced public realm, will play a key part in connecting and integrating the town and harbour. Many respondents outline the uneven balance between the attractiveness of the town compared to that of the harbour. While the harbour leverages the strength of its natural capital and public amenity offering, the town is seen as lacking these same pull factors which make the harbour so attractive. The main issues surrounding this attractiveness as outlined in survey responses centres around the poor retail offering within the town centre, from cafés, restaurants and bars to fashion, niche and indigenous business. Public realm is also seen as a key push factor from the town centre, with general cleanliness of streets detracting from the town's visual amenity and worsening its reputation. However it is noted that many of these issues have been addressed in 2021, with Dún Laoghaire announced as the 5th cleanest town in IBAL results in October 2021².

While the topic of transport is contested within the responses of both the community and business surveys, there is general consensus among responses that increasing the pedestrian mobility both within the town and between the town and the harbour is a key challenge facing the town. While Marine Road is the primary thoroughfare for both vehicles, cyclists and pedestrians to access the town centre via the harbour and vice versa, other secondary roads which run perpendicular to George's Street which would benefit from increased pedestrian priority are also highlighted within responses.

Respondents indicate that the future development of Dún Laoghaire must focus on an enhanced variety of retail offerings and a more vibrant and attractive town centre. Creative arts and innovation are key sectors for focus.

“I live in Blackrock but come to Dún Laoghaire for recreation. I rarely shop there, but would do so if there was a greater sense of vibrancy in the town...”

The availability of a high-end retail offer within the town centre is the most referenced issue regarding the future development of Dún Laoghaire. While many respondents noted the need for high end comparable retail in the town, specifically ladies' fashion and other clothing outlets, respondents also highlight the importance of experiential shopping and niche and 'quirky' retail offerings in the town.

“I would imagine Dún Laoghaire as a comfortable place to live with more pedestrian zones, public spaces and cultural activities in the town and Harbour area...”

This demand for experiential shopping is also highlighted within other towns and reflects general changes in consumer behaviour both nationally and internationally. Experiential shopping includes the availability and quality of food, beverage and services such as beauticians and barbers. Niche retail is often comprised of local and indigenous business and offers opportunities to support both new and local business and enterprise development. Demographics which use the town are also highlighted as issues, with many respondents indicating pockets of areas within the town which are prone to anti-social behaviour. Many respondents highlight issues surrounding increased anti-social behaviour during evening and night-time hours.

“Inaccessibility of Dún Laoghaire as a pedestrian or on a bicycle, especially with young children. The coastal mobility route has done a lot of good in this respect, but not in the town centre itself. Excessive car traffic through the main street and cobbled areas are a deterrent and lead to inaccessibility.”

In tandem with highlighted issues surrounding retail and vibrancy within the town, public realm, amenity and heritage are also mentioned as high-priority challenges facing the town. These concerns are mainly centred around the condition of shopfronts and their impact on the overall façade of the town, which is greatly defined by the town's heritage and Georgian and Victorian era building stock. Cleanliness is also highlighted as an issue within town, such as the provision of rubbish bins and public toilets. Coupled with concerns over the aesthetics of the public realm is the quality and availability of active public realm within the town.

Views on traffic, parking and mobility within the town and the harbour are varied throughout responses. The recently developed coastal mobility route has contested views, with many outlining how they have been a hindrance to traffic management within the town and many others advocating for their future promoting alongside increased pedestrian priority within the town and harbour. Parking is also seen as an issue, with answers both highlighting a perceived lack of parking within the town, a perceived abundance of parking which inhibits walking and cycling and issues with the rates of parking within the town and harbour being too expensive. Digital signage could help to address these issues.

4.2 Business Survey

BUSINESS PROFILES

75% of respondents were local, with 39% of businesses located in Dún Laoghaire town, with a further 36% located elsewhere in the county. 15% were located elsewhere in Dublin. The remaining 10% were in places ranging from Bray to the UK, Norway, the US, and Israel. Others responding included residents and councillors.

The top five sectors within which those responding operated were: Professional, scientific and technical services (26%), Retail (23%), Information and communication (18%), Financial, insurance and real estate activities (13%) and Arts, entertainment and recreation (13%).

Over half of respondents (56.3%) employed less than 5 people, with 11.4% between 5 and 9, 13.3% between 10 and 49. 7.6% employed between 50 and 249 and 11.4% employed over 250.

37.3% had been at their current location for over 10 years, with 31.65% between 1 and 5 years, 19% between 6 and 10 years, and 12% less than a year.

Some respondents said people visiting the harbour footfall was very important for their business, with 6% saying over 50%, 4.5% saying 25-50%, 11.5% saying 10-24% and 30% saying less than 10%. 47% said this was not applicable.

ENTERPRISE ECOSYSTEM AND POLICY

72.2% said 'Dún Laoghaire's business environment can be improved significantly for enterprise growth to be realised'.zv

The top five strengths were 'cost of living' (72%), 'accessibility' (68%), 'growth potential' (42%), 'access to services' (30%) and 'access to market and customer' (24%).

“now that more people may be working from home, we need more good quality shops in the area and as the streets, shops already exist, this is now the chance for them to be rejuvenated.”

The top five constraints were cost of housing (49%), cost of doing business (46%), cost of living (35%), availability of quality office space (23%), and access to services (17%).

Most businesses were confident about the future when considering their own sector/industry and prospects for growth, respondents were asked if they agreed with various statements with 58% agreeing their industry or sector is growing well (28.68%) or very well (29.41%) and they expect this to continue in the medium term.

DEMAND, RESILIENCE AND GROWTH

Over a third (33.6% or 125/188) had tried to source space in in Dún Laoghaire in the past 3 years.

Most respondents (31/50) had sought office space with almost all those 30 (90%) seeking offices for rent. Where a size was indicated this ranged from 20sqm to over 550sqm. Others (13/50) had sought landing space/co-working space, while a lower amount had sought either serviced sites (6/50), warehousing (3/50) or laboratory facilities (2/50).

This indicates that most of those seeking space for their business are seeing office spaces. Of those stating a size preference most were seeking spaces of 100sqm or under. However, some business owners are seeking significantly larger spaces.

Half of those who were seeking space could not source the space they were seeking (50%). Over 25% managed to source space but while some were pleased with the outcome (7.7%), others found space but were the outcome was not optimal (19%).

23% or 12/50 specified 'Other' with comments including:

- » Local co-working space was above the average price compared to Dublin city centre spaces
- » Limited options, too difficult for staff who do not live in area to find affordable housing
- » Could not source within our budget.
- » Decided to wait until post Covid

While 44% said they did not intend scaling up or expanding their business, 20% said they intended to scale up from their current location in Dún Laoghaire, with 22% who said they intended to scale up and they anticipated this requires locating to a different location in Dún Laoghaire town. 20% said they intended to scale up and they anticipated this will need an additional presence at a new location other than in Dún Laoghaire town.

When asked what timeframe they were planning this over, most (63%) said 1-3 years, 28% said less than 1 year, and 14% said over 3 years.

When asked what ways they intended to scale up or expand respondents had a broadly equal response to the five options (new products, additional marketing, additional hires, new markets, increased baseline sales), with a slightly higher response for additional hires.

While around 41% projected a 5-10% increase in staff, there were 26% who thought a 11-25% increase possible and 33% who projected greater than 25% increase.

Respondents were asked: in order for their business to grow in the medium-term, what types of spaces they would consider, what tenure type they would prefer, and what level of floor space would be required. Most indicated office space (49/74) with most seeking to lease premises rather than purchase. The next largest cohort sought landing space/co-working space (22/74) followed by warehousing 15/74) and serviced sites 7/74). Responses indicating floor space requirements ranging from smaller units for specific creative purposes 20-100 sq.m), to those seeking medium to large size premises (200-550sq.m) which could bring significant footfall to the town.

When asked their preferred location for this space from a range of options, most (72%) indicated the space should be in a single location, with 17% saying this was not applicable, and 10% saying it could be in 2 or more locations.

Respondents when asked where they would be relocating and/or expanding from if they have a business located outside of Dún Laoghaire town. Over half said elsewhere in Dún Laoghaire-Rathdown (57%), while 17.7% said Dublin City Centre, and 25% said another location.

Respondents were asked if they do not have a presence in Dún Laoghaire, and if co-working and/or serviced offices become more widely available there, would they utilise such space. Almost half of the 82 respondents replying to this question (47%) said they would utilise such space, with 37% unsure depending on the context, and 16% saying they would not use this type of space.

Respondents were asked if they could recommend priorities for growth strategies for the town centre, through the relevant planning and economic policies, what would they suggest. The top three responses focussed on streetscapes that link the harbour with the town centre (75%), Dún Laoghaire as a food destination (62%) and culture and arts (47%).

4.3 Strategic Conversations

Strategic conversations were held with 22 individuals and groups of people representing key focus areas. The businesses and organisations contacted are listed in Appendix 1. Principal points made echo many of the comments made by those completing online surveys. These include:



Themes	Principal Points
Existing Assets	<ul style="list-style-type: none"> » Dún Laoghaire Town has many positives and there is more of a perception of negative attributes than actual negative attributes, an effective promotional campaign would help to reset the image of the town, reinforcing a message that the town is a desirable place to live, work and visit e.g. positioning Dún Laoghaire as creative, vibrant and welcoming. » The proximity of the harbour and associated recreation and outdoor activities to the town centre was thought to be a USP for Dún Laoghaire and one that would motivate businesses to invest in the town, particularly the tech sector. » Provision of more opportunities for the public to engage in watersports in the harbour was also cited as something that would encourage more people to want to live, work and invest in the town. » The Local Enterprise Office is considered to be one of the best nationally and very good at engaging with the local community.

Need for enhance vibrancy	<ul style="list-style-type: none"> » There is a need to make the town centre more vibrant, both during the day as in terms of the night-time economy. This means increasing footfall but also introducing measures to activate George's Street and to signal that Dún Laoghaire is 'Open for Business'. Most visitors come to Dún Laoghaire on the weekend, yet most shops are close on Sundays giving a negative perception of the town and meaning many shops miss out on potential business. » More students in the town would mean more footfall, particularly in the evenings. IADT are seeking to expand and would be interested to consider opportunities to locate an innovation centre, even a whole department. There are further opportunities to provide student accommodation, particularly for overseas students. » In recent years the town has not been a vibrant place to be at night, with some visitors staying at the Royal Marine Hotel returning shortly after venturing out saying they felt unsafe. » Several people mentioned the methadone clinic on Patricks Street and associated anti-social behaviour. It was suggested there may be a more suitable location for this facility. » It was thought there need to be more diversity of residential development in the town centre, particularly affordable housing that would enable families to live in the town. This would mean those on lower wages working in retail, service industry, the hospital or council to live in the town, bringing more life to the town, and in turn making businesses more viable. It was thought that key development sites in the town centre should be mixed use and this would contribute to the 10-minute towns concept.
Public Realm and Maintenance	<ul style="list-style-type: none"> » There is a perception among consultees that the town needs a transformational clean up, with more bins, more regular street cleaning and a collaborative approach. This issue was also highlighted in both the online business and community surveys. It was thought by many that making the town more attractive would in turn encourage businesses to invest in the town. As noted above many of these issues have been addressed in 2021, with Dún Laoghaire announced as the 5th cleanest town in IBAL results in October 2021. Dún Laoghaire town has many beautiful buildings, many perhaps negatively impacted by poor design at ground floor level. Several people highlighted the need to continue the public realm design language i.e. materials and street furniture from the waterfront to George's Street to reinforce the feeling the town and harbour are linked. This includes wayfinding signage. » Pedestrianisation of George's Street Lower was a common thread, with many saying this would encourage increased footfall and provide opportunities for animation. It was thought this could provide opportunities for cafes and restaurants to provide additional outdoor seating. The ideal section was thought to be from St Michael's Church/Marine Road to St Michael's Hospital. However many cited the need for a traffic management plan prior to pedestrianisation to minimise secondary impacts. » There was thought to be an opportunity to create a high-end retail area at the eastern end of George's Street Upper between People's Park and Haight Street. This could include enhanced shopfronts in a Victorian style to complement the high-quality architecture at first floor level. There is an opportunity for the Council to be creative to encourage 10-15 landlords to buy in to this concept as a pilot.
Opportunities for increasing working population	<ul style="list-style-type: none"> » Trends towards more remote/co-working in towns and villages provide a significant opportunity for Dún Laoghaire town. Vacant upper floors and vacant buildings in public ownership were opportunities for delivering more co-working spaces. Businesses were though to increasingly want own door units in a post-Covid environment. » Access to a good road, rail and seaport infrastructure gives the area a huge comparative advantage that could be marketed and exploited as a means of attractive high value-added multinationals and start-ups into the area. » Many people mentioned the opportunity to integrate the harbour into the town by providing more places for people to work in the harbour.

Chapter five

SWOT
ANALYSIS

STRENGTHS

STRATEGIC LOCATION

- Strategically located within the Dublin region
- Multi-functional and major town centre
- Proximity of the harbour and associated recreation and outdoor activities to the town centre could motivate businesses to invest in the town
- Access to a good road, rail and seaport infrastructure
- Commercial vacancy rates are decreasing
- Contains a high concentration of inward commuters for work in high skilled and professional industries.

ACCESSIBILITY

- Easily accessed
- Well-connected by public transport
- Coastal town with major harbour
- Coastal Mobility Route

DEMOGRAPHICS

- Dún Laoghaire Rathdown has positive demographic indicators

EDUCATED AND CONNECTED POPULATION

- Access to a young talented workforce
- Dún Laoghaire Rathdown has the highest percentage of persons in Ireland with third-level qualifications
- Dún Laoghaire Rathdown has a highly educated and skilled labour force
- Excellent broadband services within the town
- Single largest location for foreign direct investment in the County is at the Sandyford Business District

DIVERSITY OF BUSINESSES

- The town has a wide range of diverse business
- The Glasshouse and Digital HQ

ENVIRONMENT AND STREETScape

- Distinctive sense of place and urban identity
- Strong natural capital
- Town is located along the scenic coast of south Dublin
- Social capital and representation
- Strong buy in and interest from local resident and business community
- Recreation and amenity
- Availability of both public and private recreation and leisure amenities
- dlr LexIcon Library and Cultural Centre
- Expansive network of public parks and open spaces Public open spaces
- New Top Deck music venue
- Newly opened cycle lanes

WEAKNESSES

TOWN CENTRE MAINTENANCE AND VACANCY

- While vacancy in the town is lower than many other towns, there remain a few visible buildings which are vacant, such as those next to Dunnes Stores, as well as some others commercial units on backland sites
- Dún Laoghaire Shopping Centre's appearance detracts from Marine Road and Upper George's Street

AGEING POPULATION

- While the town has access to a young, talented workforce, Dún Laoghaire has an ageing population
- Despite rapid growth from 1966-2016, the population growth rate of Dún Laoghaire-Rathdown is the lowest in the Dublin. Since 2011 the student population of the town centre study area has declined by 10% and the retired population has grown by 2% reflecting the towns ageing population.
- High numbers with disability

PERMEABILITY, PARKING AND PUBLIC REALM

- Mobility and permeability within the town is constrained
- Poor connection between the town centre and the harbour
- Perception of a lack of parking while many spaces exist
- Restricted pedestrian and cycling mobility through the town centre
- Legibility/distinctiveness
- Lack of focal points for people to gather in the town centre

RETAIL AND ENTERPRISE ACTIVITY

- Lack of high-end retail
- Availability of high-end restaurants and bars
- Poor evening economy
- Revenue from commercial rates
- Effects of Covid-19
- Limited availability of brownfield/infill sites
- Lack of high-quality enterprise spaces that are ready to occupy including large floor plate Grade A commercial space
- Perceived lack of proactivity from DLRC

- Change of use of what were formerly commercial premises to residential
- Socioeconomics
- The town experiences a net out-flow of workers
- Labour force participation rate for the study area is 55.2%, below the state and county average of 61.4% and 58.2%
- Pockets of disadvantaged areas in the town and surrounding area
- Living costs
- Highest house purchase and rental prices in the state
- Highest childcare costs in the Eastern and Midland region
- Living costs could deter people from choosing to locate or invest in Dún Laoghaire

SWOT ANALYSIS

OPPORTUNITIES

CONNECTING THE TOWN TO THE WATERFRONT

- Opportunity to link the harbour to the town centre
- Repurposing of the former ferry terminal for employment
- The marine sector

COLLABORATION AND INVESTMENT

- Collaboration between DLRC and third level educational institutions
- Capitalising on highly skilled and educated local workforce
- Large numbers of FDI in greater DLR county could produce agglomeration effects
- Growing young entrepreneurial base
- The Draft CDP's policy objective towards enterprise and employment is to liaise with Enterprise Ireland and create opportunities in DLR for the promotion of research and development/innovation
- Available commercial space can be increased with developing of industrial and miscellaneous vacant units
- Properties which service both Residential and Commercial is increasing which offers a new type of retail

CHANGING PERCEPTIONS

- An effective positive promotional campaign

- Encouraging businesses to open on Sunday could reverse perception that the town is closed for visitors

A FOCUS ON VIBRANCY

- The role of town centres is evolving with an increasing move towards multifunctionality and 'experiential' retail
- Proximity of the harbour and associated recreation and outdoor activities to the town centre could motivate businesses to invest in the town
- More students in the town would mean more footfall, particularly in the evenings
- An improved night-time economy
- Increasing footfall, while not the only measure of success, could help to address actual and perceived anti-social behaviour through passive surveillance
- Encouraging more mixed-use developments with affordable housing

PUBLIC REALM AS A CATALYST

- Pedestrianisation of George's Street Lower from St Michael's Church/Marine Road to St Michael's Hospital
- Dún Laoghaire town has many beautiful buildings, with some negatively impacted by poor design at ground floor level

- Continuing the public realm design from the waterfront to George's Street
- A state-of-the-art wayfinding system
- Dún Laoghaire Shopping Centre transitioning to a neighbourhood centre
- Dunnes Stores shareholders willing to discuss meanwhile use for vacant units with DLRC

MAXIMISING RECREATION POTENTIAL

- Covid-19 provides a renewed appreciation of public space and town centres
- Increased focus on optimising/enhancing Green/Blue infrastructure
- Provision of more opportunities for the public to engage in watersports in the harbour

CHANGING WORK PRACTICES

- Trends towards more remote/co-working in towns and villages provide a significant opportunity for Dún Laoghaire town
- Government support for remote and flexible working solutions
- 2,800 new co-working and incubation spaces are to be located within the Dublin Region as part of the #Worksmartchallenge
- Changes in Consumer behaviour because of covid19

THREATS

JOBS AND UNEMPLOYMENT

- Threat of reduced jobs
- Threats of long-term unemployment amongst population particularly amongst young employed population
- Long-term impacts of covid19
- Increased unemployment
- If Dún Laoghaire cannot maintain competitive edge
- Tourism has been significantly affected by pandemic

UNEVEN GROWTH

- Economic expansion could bypass some socio-economic groups

MACROECONOMIC FACTORS

- Threat of Brexit impacting supply chains and feasibility of indigenous businesses
- Threat of e-Commerce
- Growth of out-of-town centre retail parks and shopping centres
- Change in consumer behaviour because of covid19
- New trend of flexible working/working from home might further increase vacancy rates of offices.

SAFETY AND SECURITY

- Perceived safety and security concerns within the town in certain areas of known anti-social behaviour
- High levels of traffic and car-dominance within the town centre

INCREASING RENTS, RATES, AND PRICES

- Perception that rising rates within the town prohibit new business and enterprise start-ups within the town, although rates have remained stable in comparison to other Dublin authorities
- Available commercial space has been decreasing due to increased Residential Development
- High cost of housing
- High retail turnover along Georges Street

Chapter six

VISION AND DELIVERY FRAMEWORK



“It is essential that the town and harbour move forward into the future together, with a shared vision that unites the two. ...to maximise potential of both Studies and identify synergies.”

VISION AND DELIVERY FRAMEWORK

“It is essential that the town and harbour move forward into the future together, with a shared vision that unites the two. To this end this Study and the related Economic Plan for Dún Laoghaire Harbour share a unified vision to maximise potential of both Studies and identify synergies”

6.1 Vision

Dún Laoghaire Town has never had a localised economic Study but has historically relied on the policies and objectives of the Dún Laoghaire-Rathdown County Development Plan. This Spatial and Economic Study, grounded in a strong evidence-base and pragmatic development principles, will provide a fresh approach to policy management within the town centre and harbour area. Critically the Study seeks to:

- Provide leadership and imagination to proactively drive and deliver sustainable economic growth alongside enhanced quality of life capital in Dún Laoghaire Town.
- Be mindful of the need to provide sufficient social and economic activity which can contribute to and maintain social and economic vibrancy and vitality; and meet and reflect needs of residents, businesses, and visitors.
- Build on and harness strong foundations, aware of existing and planned levels of growth and development experienced by Dún Laoghaire Town, building on local employment, services, cultural, leisure and educational opportunities.
- Consider best practice and evidence from town centre research in Ireland and overseas.
- Look to 2040 with the objective to put Dún Laoghaire Town on track to be an economically stable and sustainable town of the future.



“The vision is based on the understanding, from research and stakeholder inputs, that for actions to encourage existing businesses to further invest in Dún Laoghaire...”

It is essential that the town and harbour move forward into the future together, with a shared vision that unites the two. To this end this Study and the related Economic Plan for Dún Laoghaire Harbour share a unified vision to maximise potential of both Studies and identify synergies.

The vision is based on the understanding, from research and stakeholder inputs, that for actions to encourage existing businesses to further invest in Dún Laoghaire, and to secure investment from new businesses, Dún Laoghaire must increasingly become a more vibrant place, a place that is safe, clean, creative; one that people want to spend time in, to dwell, to linger.

Dún Laoghaire-Rathdown County Council aim to start a new chapter for Dún Laoghaire Town, as a growing and prosperous social and economic dynamic and vibrant settlement within the Dublin Metropolitan Region by major developments in employment and government funded improvements throughout the town which will in turn act as a catalyst to attract further investments.

It is essential that the town and waterfront not be viewed through different lenses, but rather be seen as encompassing the full offer of Dún Laoghaire, one that is not just for visitors, or for the resident community, or for commuting workers, but one that provides for all.



The vision for Dún Laoghaire is for a beautiful, creative, and vibrant town which provides a desirable place to live, work and study by the sea. The town and harbour will be closely linked through cohesive branding and promotional campaigns, as well as enhanced physical connectivity. Ireland's most recognisable harbour will provide a greater range of publicly accessible recreational opportunities, while retaining its character as a working harbour through revenue generating initiatives that respect, protect, and animate the harbour's heritage. Dún Laoghaire, both the town and the harbour, will meet the future as an attractive and resilient seaside destination for all.

6.2 Delivery Framework

The aim of this Study is to develop Dún Laoghaire Town into a growing and prosperous settlement within the Dublin Metropolitan Region by facilitating major developments in employment and government-funded improvements throughout the town which will attract further investment. The recommendations, outlined hereafter, identify new opportunities to encourage growth and prosperity by providing the necessary support for a thriving local economy.

In developing the recommendations and associated actions, KPMG Future Analytics have carefully considered the findings of baseline research, the opinions and advice of those consulted, as well as national and international good practice in local economic development and the future role of town centres. The subsequent recommendations are therefore:

- Anchored on evidence and an understanding of the historic context and development of the town.
- Mindful of the importance of building strong foundations; in terms of local employment levels and services, cultural, leisure and educational opportunities, as well as the opportunities presented by location and access.
- Cognisant of the increasing importance of providing a balanced town centre offering that provides sufficient social and economic activity which can contribute to and maintain social and economic vibrancy and vitality; meeting and reflecting needs of residents, businesses, and visitors.

Recommendations are framed by three themes set out in Figure 6.1.

- Foundations for a Strong Economy; based on the understanding that investors want a more vibrant and safer town centre and an enhanced attractive public realm to encourage further inward investment.
- Supporting Existing & Attracting New Businesses; with a range of proactive supports and measures to facilitate growth are also needed for existing businesses and to attract new businesses.
- A Desirable Town; a unifying brand and associated marketing campaign are proposed to reposition the town as a more desirable place to work, live, visit, study and invest.

Pillars focus on specific aspects considered critical to the achievement of each theme. Key projects are identified for each pillar, which in turn provide the context for delivery of the Study in Chapter Seven. Projects are ambitious, achievable, and pragmatic and are targeted to respond to issues and opportunities identified during research and to available funding programmes. Together the 3 themes, 7 pillars, and 15 key projects are designed to activate and deliver on the vision.

Figure 6.1 Strategic Overview



6.3 Proposed Projects

THEME 1: FOUNDATIONS FOR A STRONG ECONOMY

The study area has many positives which can be capitalised upon, including its attractive and strategic location, the high quality of heritage architecture, strong community involvement, and trends towards remote working.

In encouraging existing businesses to invest further, and new businesses to consider investing in Dún Laoghaire, it must be recognised based on consultation and stakeholder engagement, that investors want a more vibrant town centre with increased footfall and an enhanced public realm. The local community highlight maintenance, street cleaning and anti-social behaviour as key issues for the town that must be addressed to stimulate economic investment and make the town a more attractive place.

Theme 1 focuses on three pillars to address these issues and opportunities.



PILLAR 1: PLACES FOR PEOPLE

Places for People, builds on the work already undertaken and planned by Dún Laoghaire Rathdown County Council for the study area; continuing to position the town as a showcase for exceptional public realm design, creating clean and safe places for people, with public spaces and infrastructure that encourage increased dwell time and outdoor dining.

Dún Laoghaire Rathdown County Council have included a detailed Dún Laoghaire Urban Framework Plan within the Appendices to the Draft County Development Plan 2022-2028. This Plan identifies several projects to achieve the objective of placemaking and creating vitality, as described in Chapter 3. KPMG Future Analytics recognise Dún Laoghaire Rathdown County Council are thought leaders in good-practice with regards to place-making and we support the Plan's objectives and projects. The purpose of recommendations here are to reinforce and endorse specific aspects of the Interim Urban Framework Plan, where these are envisaged to support increased economic activity in the town, based on research and engagement undertaken for this study, and upon a 10-minute town and Town

Centre First approach. Key recommendations are for the Dún Laoghaire Urban Framework Plan to be supplemented with an Urban Design Guide and Public Realm Strategy that builds upon the identified projects and initiatives and incorporates the findings of both this Spatial and Economic Study and the Harbour Master Study Report, and for a coordinated capital funding application.

Enhancing the town centre results in a more attractive environment for the local community and those visiting the town, additionally research undertaken for this project and identified elsewhere has clearly demonstrated that enhancing the appearance and vibrancy of a town will contribute to encouraging investment. Overall themes proposed in the Study (creating synergies between the town centre and the waterfront, placemaking and creating vitality, strengthening links with adjoining areas) are considered valid in the context of making the town a better place to live, work and visit. The goal is effective place-making with an emphasis on a people first approach.



OBJECTIVE:

Continue to position the town as a showcase for exceptional public realm design, creating clean and safe places for people with public spaces and infrastructure that encourage increased dwell time and outdoor dining. In so doing further enhance Dún Laoghaire town centre for residents and visitors and to catalyse investment by existing and new businesses.



**PILLAR 2:
A VIBRANT AND
CREATIVE TOWN**

A Vibrant and Creative Town, seeks to breathe life back into the town by enabling more people to live in the town centre, including students, by an animation programme for the Town Centre Quarter, and by making the town safer. This approach is informed by a people first approach and seeks to make existing businesses more viable by increasing footfall, as well as encouraging new investment by making the tow centre a more vibrant, attractive, and desirable place to be. As with Pillar 1, KPMG Future Analytics recognise the lead role DLRCC are currently playing in this area and projects outlined build on current initiatives in this regard.

OBJECTIVE:

Catalyse increased vibrancy in the town centre by enabling more people to live in the town centre, including students, by an animation programme for the Town Centre Quarter, and by making the town safer. In turn this seeks to make existing businesses more viable by increasing footfall, as well as encouraging new investment by making the town centre a more vibrant, attractive, and desirable place to be.



**PILLAR 3:
A RESILIENT
TOWN**

A Resilient Town focuses on ways to align the town centre with a climate-first approach in the context of economic and spatial development. This focus on sustainability includes provision of digital parking signage to improve traffic management, smart bins, smart lighting, and Electric Vehicle (EV) charging points.

OBJECTIVE:

Aligning the town centre with a climate-first approach in the context of economic and spatial development with a sustainability and use of smart technology, including provision of digital parking signage to improve traffic management, smart bins, smart lighting and EV charging points.

THEME 2: SUPPORTING EXISTING & ATTRACTING NEW BUSINESSES

Theme 1 focuses on creating a vibrant and attractive place; benefiting the local community, visitors and students and creating a better place to do business.

Theme 2 seeks to encourage and support existing businesses to stay and thrive in Dún Laoghaire town, recognising that many businesses need support to grow and develop and, in some cases, to survive and adapt in a post-Covid and Brexit context. Research has identified a significant opportunity to capitalise on innovation initiatives that are a core piece of the function of IADT; by bringing the focus of innovation into the town centre this enables opportunities to encourage new high potential start-ups to grow and thrive in the town centre, benefiting local businesses, adding to vibrancy, enabling access to sustainable transport, and providing workers with access to a world-class recreational offering.

This theme also seeks to support new businesses who wish to establish or move to Dún Laoghaire. It is recognised that there are businesses who wish to locate in Dún Laoghaire town, as evidenced from research undertaken to inform this Study, but who have not managed to find suitable space or space that they are happy within the study area. Projects identified under this theme seek to develop creative spaces that will enable fledgling businesses to grow, and to support private sector initiatives that tap into changing remote working patterns. Creating spaces for businesses, in tandem with an attractive and vibrant town centre, will encourage more businesses to choose to locate in Dún Laoghaire. Theme 2 focuses on two pillars to address these issues and realise opportunities in the town.





**PILLAR 4:
DEVELOPING
PARTNERSHIPS**

Developing Partnerships, seeks to proactively develop and provide spaces matched to business's needs. This addresses the evidence that businesses are seeking spaces in the town and seeks to identify a mechanism to collaboratively develop such spaces, and to link spaces with investors. Acknowledging the private sector initiatives to develop enterprise space in the town centre, the second element of this pillar focusses on continued support for such initiatives.

Dún Laoghaire town has a wide variety of vested interests and stakeholders with the depth of interest of different groups, particularly in the context of research undertaken to inform this Study, tantamount to the connection people have with the town. With this connection can come conflicts and there has in the past been conflicting views on the optimum direction of travel for the town. This is typical of many towns which have a range of vocal stakeholders. There is not considered a need to create a new group for the management of the town, with Dún Laoghaire fortunate to have a Town Team with buy-in of key stakeholders including business and resident community, and local authority.

OBJECTIVE:

Proactively develop and provide spaces matched to business's needs; and continue support for private sector initiatives to develop enterprise spaces in a strategic manner, thus creating a wider range of commercial space for lease and purchase and encouraging increased investment.



**PILLAR 5:
INCENTIVES
AND SUPPORTS**

Incentives and Supports focusses on the promotion and provision of a range of existing and new enterprise and business supports. This includes existing supports provided by LEO, DLR Economic Team and Enterprise Ireland, and new grant incentives to encourage new businesses to invest in Dún Laoghaire town.

OBJECTIVE:

Encouraging increased investment in the town centre through promotion and provision of a range of existing and new enterprise and business supports and incentives.

THEME 3: A DESIRABLE TOWN

The clear message coming from both Dún Laoghaire-Rathdown County Council and the consultation element of this project was that **Dún Laoghaire is a harbour town – where town and harbour are closely linked, for it is only this symbiotic relationship that will ensure that Dún Laoghaire lives up to its full potential.**

“...to position Dún Laoghaire as a growing and prosperous town that is socially and economically dynamic, and vibrant as a result of major developments in employment and Government-funded improvements throughout the town...”

The vision for Dún Laoghaire set out in this spatial and economic Study is for a beautiful, creative, and vibrant town, closely linked to its harbour, that is a desirable place to live, work and study by the sea. Links between the town and the harbour will be strengthened through enhanced physical connectivity, branding, and promotion. It looks to position Dún Laoghaire as a growing and prosperous town that is socially and economically dynamic, and vibrant as a result of major developments in employment and Government-funded improvements throughout the town, which will act as a catalyst to attract further investments. To achieve that, not only will the Study need to be implemented, but a recognisable brand be developed for the unified town and harbour, accompanied by a clear, simple, and comprehensive marketing strategy to promote 'why Dún Laoghaire' to those who are looking for a place to live, to set up a business, or to relax. Our recommended approach looks first to the development of a unifying brand for town and harbour; then the development of a marketing strategy for Dún Laoghaire, complemented by a time-lined marketing implementation plan.

Recommended marketing approach:



UNIFYING BRAND



MARKETING STRATEGY



MARKETING STUDY



**PILLAR 6:
A UNIFYING
BRAND**

OBJECTIVE:

Creation of a unifying brand for the town and harbour that will resonate both with the local community and the wider audience it is trying to attract to the town.



**PILLAR 7:
CHANGING
PERCEPTIONS**

OBJECTIVE:

Development of a comprehensive marketing strategy and implementation plan for Dún Laoghaire that will promote Dún Laoghaire as a desirable town, challenging the current narrative and highlighting the attractiveness of DLR as a place to work, live, study, visit and invest.

**6.3 Proposed
Projects**

**THEME 1.
PILLAR 1:
PLACES FOR PEOPLE**

**Project 1: Enhancing
streets and public spaces**

The Interim Dún Laoghaire Urban Framework Plan recommends several significant projects which are supported by KPMG Future Analytics in the context of this study. These include:

- Development of public spaces at Myrtle Square on George's Street Lower, and the northern end of Marine Road next to Victoria Wharf.
- Enhancing the Marine Road streetscape
- Further development of a new street between Marine Road and Haigh Terrace past the Royal Marine Hotel
- Opportunity to upgrade the existing landscape and environs of the Royal Marine Hotel
- Examining the potential to prioritise pedestrian and cycle movement along Park Road
- Completion of a pedestrian link between Sussex Street and Crofton Road
- Redevelopment of the hospital lands, the Boylan Centre and the former VEC building on Eblana Avenue
- Enhancement of George's Place
- Focus on distinct quarters including Town Centre Quarter, Park End Quarter, Seafront Quarter, and Old Town Quarter.³

3. While the normal range of major town centre uses and functions will still be acceptable in the secondary quarters, the emphasis will be to encourage and promote retail uses and activities appropriate to the quarter. Examples of types are retail deemed suitable for each quarter in include: M Specialist clothing / footwear brands, boutiques / leisure fashion, specialist home stores / crafts, antiques, specialist food and restaurants for the Park End Quarter; M Leisure/ tourist/marine focus, boating equipment, gift/souvenir/craft, galleries/ tourist shops and specialist food/confectionery for the Seafront Quarter; M Specialist home stores / crafts, young trend clothing / footwear brands, culture / galleries / gifts, music / books, restaurants / world cuisine and evening culture for the Old Town Quarter

Pedestrianisation

The Interim Public Framework Plan for Dún Laoghaire Town includes several references to pedestrianisation. There has been a paradigm shift in the approach to town centres as places for people, with a movement to minimise and restrict vehicular journeys, facilitating a pedestrianised heart for the town. Building on previous interventions in Blackrock, Dundrum, Sandycove, Glashule, and Dalkey, DLRCC's Summer Streets pilot pedestrianisation initiative⁴ which concluded on 1st October 2021, aimed to provide safe, welcoming, and people-friendly public spaces in towns and villages and bring life, food, and energy to the County's streets in summer 2021. The aim of this trial is to create a more people-friendly environment with programmed events and activities for families, children, and older people. Additional age-friendly seating is proposed, along with an area of natural play at Myrtle Square.

The objective of DLRCC in this regard is supported and KPMG Future Analytics recommend the Council consider pedestrianisation of:

- George's Street Lower between Marine Road and Library Road, with consideration of extension to York Road.
- Patrick Street, to avoid this road being used an alternative route and to enable opportunities to encourage provision of outdoor dining.
- Eblana Avenue and Sussex Street
- Park Road
- Consideration of future pedestrianisation of George's Street Upper between Marine Road and Corrig Avenue

Figure 6.2
Lower Georges
Street during
Summer
Streets 2021,
source DLRCC



There is also an opportunity to:

- Encourage increased dwell time by cyclists by providing additional cycle parking, particularly in the vicinity of cafes and restaurants,
- Place overhead cables underground to enhance the overall streetscape,
- Make streets safer, by reducing traffic speeds in the town centre, and by promoting a shared surface approach in areas which are not pedestrianised.
- Reinforce the maritime connection through interventions such as overhead sails along George's Street Lower following pedestrianisation.

The objectives as outlined above and detailed in the Interim Urban Framework Plan are fully supported by KPMG Future Analytics as an innovative place-making approach, that will enhance the function, ambience, and appearance of Dún Laoghaire town centre. While they will undoubtedly make the town a more pleasant and vibrant place for the local community and those who work in the town, they will also make the town a more attractive place for those considering investing. Providing a network of attractive and green urban spaces and public realm will enhance people's experience of the town while also tacking climate action to create a low carbon, climate resilient and sustainable town.

It is recommended that DLRCC supplement the Dún Laoghaire Urban Framework Plan with an Urban Design Guide and Public Realm Strategy, as discussed in Chapter 3, that builds upon the identified projects and initiatives and incorporates the findings of both this Spatial and Economic Study and the Harbour Study. It is envisaged that the Urban Design Guide and Public Realm Strategy will provide the framework for subsequent applications to the Urban and Regional Development Fund (URDF) for design and implementation.

"...The aim of this trial is to create a more people-friendly environment with programmed events and activities for families, children, and older people.."

4. <https://www.dlrcco.ie/en/news/general-news-public-notices-press-releases/dlr-summer-streets-destination-dun-laoghaire>

**THEME 1.
PILLAR 1:
PLACES FOR
PEOPLE**

**Project 2:
Enhancing town
and harbour
linkages**

The Interim Dún Laoghaire Urban Framework Plan seeks to reinforce connections between the town and harbour. This includes objectives to:

- Explore in association with Irish Rail and the NTA how better connections for pedestrians and cyclists can be made across the DART line to link any development at the Gut into a more defined neighbourhood centre at Old Dún Leary and create linkages between the West Pier and the adjoining residential areas at Monkstown.
- Upgrade the road leading from the Coal Quay Bridge to the Gut and to explore the possibility of providing pedestrian access by way of a cantilevered boardwalk.

The Plan further includes detail around building on previous placemaking initiatives on laneways such as Haigh Terrace. Further development of routes such as these to increase permeable pedestrian and cycle routes are supported. It is recommended that 24-hour public access is required through any new developments between George's Street (Upper and Lower) and the harbour.



Figure 6.3 Haigh Terrace, source DLRCC

The Metal's project has been a significant and innovative intervention that as seen the railway cutting covered in the vicinity of People's Park, and between the dlr Lexlcon Library and Marine Road. There may be further opportunities to extend this initiative.

It is recommended DLRCC continue to explore opportunities for further connectivity between town and harbour.

**THEME 1.
PILLAR 1:
PLACES FOR
PEOPLE**

**Project 3: Continued
Maintenance of
Public Spaces**

The consultation and engagement undertaken for this study indicate there is a perception that litter is a key issue for the town, both impacting on the experience of the community, visitors to the town, and potential investors. While this is a national issue, in the latest IBAL report for 2021 Dún Laoghaire is positioned as the 5th cleanest town in Ireland and cleaner than European norms.

It is however important that investment in public realm infrastructure is linked to investment in maintenance of public spaces and recent efforts in this regard, such as the annual Dublin Community Clean Up should be continued.

It is recommended that recent enhanced litter and town centre maintenance measures be continued along with future collaborative clean ups as part of the Dublin Community Clean Up initiative.

Figure 6.4 #DublinCommunityClean-Up, source DLRCC



**THEME 1.
PILLAR 1:
PLACES FOR
PEOPLE**

**Project 4: A legible
town – wayfinding plan**

Many visitors to Dún Laoghaire are unlikely to be aware of what the town centre has to offer if they have not visited previously. Currently there is no cohesive signage plan in place. A Wayfinding Plan will address these issues, creating a welcoming and informative atmosphere. This will create a sense of welcome, direct visitors to the town centre and new visitor hubs. Development of an associated wayfinding project, linked to key visitor focal points, can help to communicating the wider offer of Dún Laoghaire town and ensuring that visitors can explore the town on foot with confidence, to local attractions, or just for a stroll around town with stories communicated through effective interpretation. This Wayfinding Plan would include:

- audit of current signage and decluttering
- welcome signage on approach roads to Dún Laoghaire town centre
- signage to tourist hubs from entry points to town, including DART station.
- walking trail to link key points in the town centre in a cohesive way.

Providing effective digital map-based signage will enable visitors to explore the town with ease, encourage the visitor to linger and increase spend in the retail and hospitality industries, thereby improving the local economy. The knock-on effect will be an increase in business and employment, increased investment in the town centre, reinforce sense of place and

local pride. Highlighting points of interest while creating interesting stories about these locations should encourage both locals and tourists to walk the town in a way previously not envisaged, bringing them to parts of the town off the beaten track and opening up the full extent of the town and its attractions. Effective signage will also encourage the visitor to use Dún Laoghaire town as a base to visit nearby attractions, creating enough to do for more than a one-night stay, improving visitor experience and increasing visitor spend.

It is recommended DLRCC consider commissioning a state-of-the-art wayfinding strategy for the town and harbour.



**THEME 1.
PILLAR 1:
PLACES FOR
PEOPLE**

Project 5: Beautiful shopfronts

Dún Laoghaire town has a rich architectural heritage, particularly along George's Street Upper and Lower. However, some shopfronts do not maximise the heritage value of the buildings above, particularly towards the Park Road end of George's Street Upper, in the vicinity of Marine Road and some between Marine Road and St Michael's Hospital. However, there are some notable exceptions, where building owners or lessees have developed shopfronts in keeping with the building. The appearance of shop fronts and the buildings in which they reside have a considerable impact and influence on the character of a place. They are an essential element not only of the buildings in which they are set, but also of the wider streetscape. A shop front that has been designed with respect given to the architecture of the building and character of the surrounding area can add charm and vitality, making the town centre attractive to shoppers and visitors alike.

Dún Laoghaire-Rathdown County Council established the Shop Front Improvement Scheme to support the improvement of the overall appearance of commercial properties that front onto public streets within Dún Laoghaire-Rathdown. The shop front improvement scheme supports business owners who contribute to the local environment and raise the image of town centres in Dún Laoghaire Rathdown which in turn leads to increased local and visitor footfall. So far 40 businesses have been supported in 2021. Further information this scheme can be found here <https://www.localenterprise.ie/DLR/Financial-Supports/Shop-Front-Improvement/>

It is recommended that DLRCC continue to encourage and facilitate shopfront enhancement.



**THEME 1.
PILLAR 2:
A VIBRANT AND
CREATIVE TOWN**

Project 6: Increase student population

There is a significant opportunity presented by IADT. Key points are that:

- IADT currently has 2,500 students and 400 staff and is seeking to expand and grow.
- IADT have applied for European University status. The ambition is to become a University of the Creative Arts with approximately 4,500 students within five years. If this application is successful, then IADT will need capacity to accommodate international students.
- IADT would like to improve the connection between the town and the campus to benefit each.
- IADT's room to expand is constrained with a need for additional teaching space.
- KPMG Future Analytics are aware from research and stakeholder consultation that there is a lack of young people living within the study area. This limits the evening economy potential.
- IADT's Media Cube service has assisted in the establishment and development of 70+ enterprises and enabled the creation of 800+ jobs over the last decade. The IADT Media Cube is currently home to 15 award-winning, globally trading start-up companies in fintech, the entertainment industry, venture capital and design innovation, with spaces up to 24sqm. However, many jobs created have gone to Sandyford or Dublin City, as there is a lack of suitable spaces for 2nd landing start-ups in Dún Laoghaire Town i.e. spaces for 4-5 person + companies. There is thought to be significant pent-up demand and, were spaces available, these could be filled from the Media Cube⁵.

Figure 6.5 Dún Laoghaire Carnegie Library, source DLRCC



Below: Figure 6.6 Former Senior College, Eblana Avenue, source KPMG Future Analytics



- The town can benefit from the creative and entrepreneurial expertise of IADT. It is envisaged that start-ups associated with the institution will see the benefits of locating in the town and develop new clusters, further reinforcing the creative reputation of Dún Laoghaire.

By developing Dún Laoghaire's reputation as a vibrant student town this will encourage retail providers to extend their trading hours and facilitate an 18-hour local economy. Key buildings are currently in public ownership could facilitate this. The Carnegie Libraries have a rich heritage as a community facility. The Carnegie Library in Dún Laoghaire is suitable for a range of uses but these uses must be of benefit to the economy and community of the town. This is a significant opportunity for introducing a use that would encourage vibrancy.

Dún Laoghaire Rathdown is home to a wide variety of people engaged in the creative arts. The voluntary DLR Artist Network (ArtNetdlr) was established and facilitated by DLRCC's Arts office in 2012. The aim of the group is facilitation, through communication, workshops, talks and other events, supporting the artistic community throughout the county of DLR. ArtNetdlr are seeking a space to establish a creative and cultural hub in the centre of Dún Laoghaire town that will serve the needs of the local and 'artistic community'. This hub could include a workshop, digital media lab, meeting rooms (which could also be used for community meetings), exhibition space, studio and workspaces.

It is recommended DLRCC engage with IADT Management, Dún Laoghaire Education and Training Board and ArtNetdlr, and the following uses for currently vacant publicly owned buildings are proposed:

- Carnegie Library: Adapted for use as Carnegie Innovation & Creative Hub (CICH). A shared space for an IADT innovation hub, linked to the Media Cube for High Potential Start Ups (HSPUs) and incubation with c.50 students; for a creative and cultural hub for ArtNetdlr; and for community meeting space. This could bring a day and evening presence to the eastern end of George's Street Lower.
- Loreto Senior College, Eblana Avenue: IADT department with c.300 students. IADT have indicated that this building, while requiring significant renovation, would be suitable for a department of the

college. This could bring significant numbers of students into the Town Centre Quarter and animating the eastern end of George's Street Lower, Marine Road, Eblana Road and Sussex Street.

Seeking to locate increasing numbers of third level students in Dún Laoghaire town centre not only contributes to objectives regarding vibrancy, but additionally taps into DLRCC's climate first objectives, in that students will be encouraged and be able to take the DART to college, rather than drive to the main IADT campus.

Co-locating a creative arts hub and community meeting rooms would not only reinforce the town's role as a home for creative arts, and Enhance the reputation of Dún Laoghaire-Rathdown as a centre of creativity, innovation, artistic and cultural activity; but also Bring additional vitality to the 'Old Town Quarter' at Library Road on George's Street Lower.



**THEME 1.
PILLAR 2:
A VIBRANT AND
CREATIVE TOWN**

Project 7: Produce a Dún Laoghaire Local Area Plan

Dún Laoghaire Town has never had a specific local area plan but has historically relied on the policies and objectives of the Dún Laoghaire-Rathdown County Council Development Plan. Dún Laoghaire Urban Framework Plan (DLUFP) which has been part of County Development Plan's since 2004, has guided investment by the local authority and decisions by the Planning Authority. The harbour town of Dún Laoghaire would benefit from a Local Area Plan to provide more granular guidance on the application of DLUFP. A Local Area Plan (LAP) is a statutory document prepared by the Planning Authority in accordance with the requirements of the Planning and Development Act 2000 (as amended). The production of a dedicated Dún Laoghaire LAP would:

- Provide a clear plan led approach to Dún Laoghaire Town and Harbour;
- Incorporate the findings of the Spatial and Economic Study for Dún Laoghaire Town, and the Economic Plan for Dún Laoghaire Harbour;
- Establish and set out principles and objectives for the future development of the area;
- Enable stakeholder engagement and stimulate public debate on what broad planning matters should be considered in the new LAP.

It is recommended that DLRCC produce a LAP for Dún Laoghaire Town and Harbour.

A key research area for this study was to identify whether, as was thought, there had been an overall decrease in commercial office/retail floor space available for employment uses in the town, and a consequent reduction in the overall number of jobs located in the town. Evidence from research undertaken to inform this study indicates there is a downward trend in available commercial office space in the study area (see detail in Appendix 2, 2.2.16).

Findings from the consultation undertaken for this Study found that there was demand from businesses to locate in the town, were the right spaces to be available for lease. Several opportunity sites within the town are identified in Chapter 3. Some sites may be suited to uses other than commercial/retail, such as education, as outlined in Project 6. Where sites offer potential for future commercial/retail use in the town centre, these sites should be protected and zoned for such use. The rationale being that retention of sites for commercial use will help to ensure a balance of development between residential and commercial use. The availability of such sites for development for commercial/retail use should be promoted as part of a coordinated town marketing strategy (see Project 15).

It is recommended that, as part of the proposed LAP, Dún Laoghaire County Council protect key existing commercial sites for future commercial use (office and retail).

Increasing the number of people living within the study area will contribute to increased vibrancy. However, there is currently a lack of affordable housing within the study based on engagement undertaken to inform this study. This means that many of those who work in medium to low income employment in the town are unable to purchase or rent accommodation nearby, necessitating a commute with attendant climate impacts. The Interim Urban Framework Plan for the town seeks to encourage residential development in upper floors on retail premises on George's Street Upper and Lower.

It is recommended that, as part of the proposed LAP, Dún Laoghaire County Council continue to support mixed use developments in existing retail units where the ground floor commercial/retail unit is retained.

**THEME 1.
PILLAR 2:
A VIBRANT AND
CREATIVE TOWN**

Project 8: An animated Dún Laoghaire – town and harbour



Dún Laoghaire is an animated place with significant numbers of visitors coming for the food market and for passive and active recreation, particularly at weekends. Pre-Covid many events took place in and around the town. There is an opportunity to enhance the animation of the town through creation of spaces to act as catalysts for events, and to focus on town-based events.

Art plays a significant role in animating streetscapes. Ten walls were painted in the town to enhance the appearance of the town during the summer of 2021. Meaning "here" in Irish, Dún Laoghaire Anseo is our way of letting everyone know, after everything that has happened during 2020 and 2021, that we're still here. It is our take on the essence of Dún Laoghaire, borrowing not just from its maritime heritage but reflecting on all the elements that make Dún Laoghaire a unique place⁶.

It is recommended that DLRCC in partnership with the local community and businesses consider:

- Developing a defined programme of seasonal events for the town centre area, including evening events. Suitable spaces for arts and cultural events could include new town squares proposed at Myrtle Place, St Michael's Church, and the northern end of Marine Road next to Victoria Wharf, open areas around the dlr LexIcon, and part of the Carnegie Library. It is suggested this development of public realm in new public squares include a lack of clutter and easy access to power and amplification to enable markets and events.
- Consider car-free Sundays and seasonal holidays on Upper George's Street and the southern end of Marine Road to create spaces for events and street entertainment. Explore opportunities to link Upper Georges Street and Marine Road to Lower Georges Street for summer and Christmas seasons.
- Seek and encourage temporary/meanwhile uses for vacant buildings.
- Continue to encourage and incentivise street art.
- Identify opportunities to link and animate routes between town and harbour along pedestrian corridors.



Figure 6-7 #dlranseo

**THEME 1.
PILLAR 2:
A VIBRANT AND
CREATIVE TOWN**

Project 9: A Safer Town

People's perceptions of personal safety can influence their decision to visit a place. Incidences of anti-social behaviour may have declined in the town centre, but the perception of risk can last for longer. Increased residential density and footfall can provide passive surveillance of the town centre area not only discouraging anti-social behaviour and crime, but also reducing the perception of same. Streetscape design and lighting can also play a strong part in encouraging a feeling of safety, particularly for women, with these discussed under Project 1. Enhancing the streets and public spaces.

The issue of safety and anti-social behaviour was highlighted many times in consultation undertaken to inform this study, many highlighted issues with the Patrick Street Addiction centre, with some suggesting that while a town should cater for all elements of society, equally people should not be deterred (with associated negative economic impact) from visiting a place because of the actual or perceived anti-social behaviour. The local policing forum in Dún Laoghaire was established in 2014 and includes representatives from the Gardaí, the community, HSE, local authority officials and elected members of Council. This forum is the appropriate place to discuss issues of anti-social behaviour and the solutions regarding same.

It is recommended that the local policing forum could consider, as a matter of urgency, ways to address anti-social behaviour, and importantly the perception of anti-social behaviour. This could include consideration of options for the functions of the Patrick Street Addiction Clinic in consultation with the HSE.

Figure 6.8 Dún Laoghaire Town Hall, source DLRCC



**THEME 1.
PILLAR 3:
A RESILIENT
TOWN**

Project 10: Using Technology

Digital parking signage
While there are over 4,500 parking spaces available serving the town centre, people do not currently know which are free, particularly at peak periods. This in turn leads to an increase in town centre car-based journeys due to people seeking free car-parking spaces. Digital signage at town centre approach roads providing information on parking capacity and location would reduce the need for such journeys. In addition, an app could be developed that would provide information on available car parking spaces. The Interim Urban Framework Plan includes an objective to:

"embrace 'Smart' cities initiatives to improve traffic management and include appropriate variable Message Signage (VMS) and smart car parking technologies within the Interim Framework Plan area".

It is recommended that DLRCC consider implementing Variable Message Signage and smart car parking technologies for Dún Laoghaire town centre.

Smart bins, smart lighting and EV charging points

Obtaining, interpretation and acting on good quality data is increasingly important if not fundamental to the success of town centres. Technology has enabled a wide variety of hardware to be employed within street furniture that enabled the gathering of data to inform decision making. The town centre has high bandwidth, free Wi-fi, and some smart-bin footfall counters.

Dún Laoghaire-Rathdown County Council installed state-of-the-art technology at three locations along George's St, Dún Laoghaire in May 2021. The technology analyses road user movements on a continuous 24/7/365 basis and provides highly accurate, robust data on footfall flows and movement patterns. The counters are located at: George's St Upper, Marine Road junction, and George's St Lower⁷.

There is an opportunity to continue technological initiatives with more smart bins, smart lighting which includes air quality monitoring sensors and further footfall counters as required.

It is recommended that DLRCC consider continuing the current programme of installing smart bins, smart lighting and footfall counters in Dún Laoghaire town centre to provide an evidence base for decision-making.

It is an objective of the Draft County Development Plan to provide more smart ev charging points, while this would align with objectives regarding a climate first approach, it is recommended that charging points be provided on the outskirts of the town centre to discourage additional vehicle journeys for the purpose of charging vehicles.

It is recommended that DLRCC consider prioritising installation of smart ev charging points for electric vehicles on the outskirts of the study area.

THEME 2. PILLAR 4: DEVELOPING PARTNERSHIPS

Project 11: Creating spaces for businesses

Research undertaken for this study indicated there are a range of business seeking space in Dún Laoghaire. The aim of this project is to proactively develop and provide spaces matched to business's needs. An example of this taking place elsewhere would be the partnership between Nottingham City Council and Nottingham Trent University to develop spaces within the Nottingham Creative Quarter⁸, or Waterford City and County Council's policy of acquiring city centre buildings for renovation through an Office Refurbishment Grant Scheme.

Ideal properties are envisaged to be vacant units above shops, where these can be repurposed and adapted. The wider objective is to reduce vacancy and to increase occupancy and vibrancy. Re-use of existing buildings would align with best practice for re-use and re-purposing of existing buildings, rather than their demolition and reconstruction. However to retain vibrancy, it would not be recommended that ground floor units be converted from retail to office use on George's Street Lower or Georges Street Upper from the People's Park to the junction with Clarinda Park West/ Mellifont Avenue.

Types of businesses envisaged for such commercial/office spaces include:

- Businesses that could develop from the Media Cube or the proposed IADT Innovation Centre located at the former Carnegie Library (see Project 6). It is envisaged these spaces would be linked to



- the Carnegie centre as outreach incubation units with shared services such as printing facilities, IT, cleaning etc.
- Existing businesses in the town who are seeking new space or additional space of varying sizes;
- SME businesses currently located elsewhere in the County or elsewhere in Dublin, Ireland or overseas.
- Larger businesses who have an anchor office located in the Dublin City area or Eastern and Midlands Region who are seeking a remote working office in the Dún Laoghaire area.
- Uses that are currently under-represented in the town⁹.

Dún Laoghaire LEO currently operate a Commercial Property Support Scheme to encourage use of vacant premises.¹⁰ This includes a sliding-scale refund of 75%, 50% and 25% of rates paid in the first three years on occupying a commercial premises which was previously vacant for at least 6 months. This is subject to a maximum refund of €7,500, €5,000 and €2,500 respectively for each year. **It is recommended this scheme is continued.**

It is recommended that DLRCC evaluate comparative mechanisms and opportunities for collaboratively developing enterprise spaces in a strategic manner in Dún Laoghaire town centre, targeted to creative and digital businesses in Dún Laoghaire town, County, Dublin City, and the EMRA Region.

THEME 2. PILLAR 4: DEVELOPING PARTNERSHIPS

Project 12: Strategic support for co-working centres

Dún Laoghaire town is fortunate to have two entrepreneurs who have developed co-working centres in the town centre.

- **The Glasshouse** developments¹¹ include The Dún Laoghaire GH1 co-working space with eight office spaces and The Dún Laoghaire GH2 with 23 serviced offices, 30 hot desks and 4 meeting rooms. Each are fitted with furniture, high-speed broadband internet, intelligent lighting and private intercom system. Members also have access to outdoor bike racks, a fully equipped kitchen, showers and lots of other amenities.
- **Dún Laoghaire Enterprise Centre**¹², operated by Digital HQ clg, is located above Bank of Ireland on George's Street. The mission of Digital HQ is to provide subsidised space to companies that wish to grow in Dún Laoghaire. Membership provides high quality meeting rooms, community space for free workshops, kitchen facilities, free printer and free broadband. Dún Laoghaire Enterprise Centre is home to @DigitalDúnLaoghaire providing members with networking and learning opportunities.

Figure 6.9 The Glasshouses co-working centre, source Chad Gilmer



In addition DLRCC have secured an investor to convert the Ferry Terminal into a co-working centre with capacity of c.500 desks. This has the potential to position Dún Laoghaire to the forefront of locations for the start-up and SME community in Dublin.

Towns, such as Dún Laoghaire, are expected to benefit at the expense of city centre locations which may be more expensive or require a longer commute. It is envisaged that there will be continuing demand for co-working and small office space due to benefit based on;

- expressions of interest provided in online surveys undertaken to inform this Study;
- the trend towards remote working; and
- the amenities and lifestyle that Dún Laoghaire offers.

This would help bring vacant spaces into play to meet user's needs. It is envisaged that spaces such as these would appeal to sole traders, start-up businesses and businesses with less than 10 people, whereas those envisaged to be developed as part of The Ferry Terminal Project can be of any size up to 20 employees.

It is recommended that DLRCC encourage and facilitate increased provision of co-working space in Dún Laoghaire town in a strategic manner that allows for managed growth.

7. <https://www.dlrcco.ie/en/business/d%3%BAAn-Laoghaire-footfall>

8. <https://www.creativequarter.com/about-the-cq/creative-quarter-aims>

9. Types of retail that were high-lighted in response to the public survey included ladies' fashion, chandlery, high end delicatessens, art galleries, craft shops, fish restaurants, bakeries, hardware, independent cafes, health food takeaway

10. <https://www.localenterprise.ie/DLR/Financial-Supports/Vacant-Commercial-Premises/>

11. <https://www.theglasshouses.ie/locations/dun-laoghaire/>

12. <https://www.creativequarter.com/about-the-cq/creative-quarter-aims>

**THEME 2.
PILLAR 5:
INCENTIVES
AND SUPPORTS**

**Project 13:
Enterprise supports**

It is recognised that DLR Local Enterprise Office (LEO) provides a wide range of supports for businesses that have up to ten staff. This includes initiatives for existing and new businesses.¹³

The Councils has a growing Economic team that supports businesses that are not eligible for the LEO supports, with this team working closely with local businesses.

A four year plan Local Economic and enterprise Plan 2021-2024 outlines the vision for supporting the business community <https://www.dlrcoco.ie/en/business-economic-development>. For businesses who employ more than ten people, Enterprise Ireland provide a range of supports¹⁴.

It is recommended that Enterprise supports are promoted to existing and new businesses as part of a promotional campaign for Dún Laoghaire town centre (see Project 15)



**THEME 3.
PILLAR 6:
A UNIFYING
BRAND**

Project 14: Unifying brand for town and harbour

A unifying brand is important for the promotion of Dún Laoghaire as a desirable town because it very clearly connects not only the town and the harbour, but all the associated elements to do this the project – on-street marketing; website; social media; and marketing materials, to name but a few.

To this end, we recommend the following:

Brand identity: The development of a brand identity for Dún Laoghaire that reflects the new vision for the harbour town, along with its key strengths. This should reflect all aspects of this Study that makes Dún Laoghaire a desirable town: the foundations for a strong economy – its people and its places, along with its economic sensibilities. This process should determine brand vision, mission and values, brand strategy and position, story and brand messaging. It should also include stakeholder engagement, which encourages interest in and support from the local community. In addition to brand messaging, the branding development process should result in a logo, tag line, colours, typography, logo usage and brand guidelines. The branding should be used in signage throughout the town and harbour, creating a clear link between them, as well as in all marketing collateral.

The development of a brand identity could perhaps be used as an opportunity to let people know that things are happening for Dún Laoghaire by running a competition to invite members of the public to select the final brand for the town, giving them a choice from a number of options.

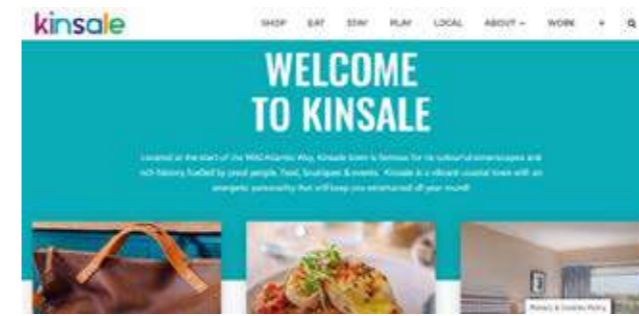
Comparable brands include Kinsale.ie; Sligo.ie; and Bray.ie. Each of the sites carries a clear narrative about the area, beautiful video footage showcasing what the area has to offer, as well as well-positioned sections on their websites providing clear information for each of their target audiences (generally visitors, residents, and businesses). Each of the logos in the websites are carried through to their social media accounts.

Brand management: To quote Warren Buffett: "It takes 20 years to build a brand and five minutes to ruin it. If you think about that, you'll do things differently." To get the most out of a brand, it must carefully managed, with consistency of appearance and proper usage to the fore. To this end, in addition to brand guidelines, we would recommend the development of a brand and communications policy to ensure brand integrity and consistency in approach to marketing and communications.

It is recommended that DLRC consider procuring a brand development specialist to help it to develop a unifying brand for Dún Laoghaire that will resonate both with the local community and the wider audience it is trying to attract to the town. The brand identity should be aligned with the marketing strategy. While final cost of a branding project would depend on the scope of the project, an estimated budget would be in the region of €10,000 - €15,000 ex VAT.

13. <https://www.dlrcoco.ie/en/business-economic-development>
14. <https://www.enterprise-ireland.com/en/funding-supports/>

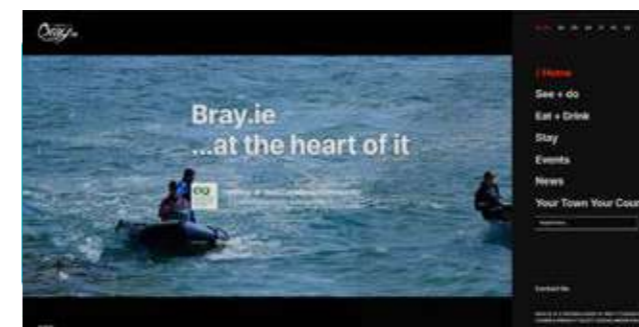
**Kinsale.ie
WEBSITE**



**Sligo.ie
WEBSITE**



**Sligo.ie
WEBSITE**



TWITTER



TWITTER



TWITTER



THEME 3 PILLAR 7: CHANGING PERCEPTIONS

Project 15: Promoting the positives

An effective marketing communications strategy is essential to communicating to key stakeholders 'why Dún Laoghaire', setting out clearly and consistently what has been achieved, what is planned for the town, the benefits to various stakeholders, and how they can get involved. In this regard, we recommend the following:

Development of a marketing strategy:

A comprehensive marketing strategy should be developed for Dún Laoghaire town and harbour, which would be the essential guide to all marketing for Dún Laoghaire town. It should be accompanied by a marketing plan, setting out how the strategy is to be implemented in a particular timeframe. An overarching document lasting for the lifetime of Dún Laoghaire 2040: Spatial and Economic Study for Dún Laoghaire Town, the strategy would house in one document the key elements for successful communication. Specific to this project, it would set out: the who (key stakeholders); where (appropriate communications platforms); why (objectives for communications); what (key messages); how (tools and tactics) and when (appropriate timing).

Messaging

Key to any marketing strategy is clear, concise, and consistent messaging. While the development of the brand identity would draw on a vision for Dún Laoghaire and its advantages as a place to live, trade, and to visit, stronger messaging under each of these three strands – coupled with clear calls to action – are required to fully articulate the Council's vision for the town. It is recommended this include:

- An overall narrative for the town, weaving together the town and the harbour and the combined ambitions.
- Specific messaging for key audiences, outlining what Dún Laoghaire has to offer for residents / potential residents; businesses / potential businesses, and visitors / tourists.

This messaging should provide baseline text for all marketing collateral for the town, including the website, publications, letters, corporate communications, boilerplates for press materials etc, with the text expanded and contracted as appropriate.

Audience mapping

As part of the development of the brand marketing strategy a comprehensive audience mapping exercise should take place to drill down into the key audiences for communication about Dún Laoghaire, as identified through the spatial and economic Study. The appropriate communications platforms should then be identified through which to reach them. At a high level, key audiences would include:

- Residents and businesses.
- Potential residents and economic investors.
- Tourists (residents of the wider Dublin and Greater Dublin area; tourists from other parts of Ireland; European and International).
- Policymakers.
- Media: local and national media.

Audience mapping and associated stakeholder engagement in action:

In Project 6, the links between the student population and businesses in the town have been highlighted, with Dún Laoghaire's reputation as a vibrant student town identified as encouraging local retailers to extend their trading hours and facilitate an 18-hour local economy. For this to work, the key stakeholders need to be consulted and involved in the process. Through stakeholder mapping each of these groups would be broken down into its constituent parts (e.g. the 'students' stakeholder group would be broken down to include: named representatives from the colleges; named representatives from the students' unions e.g. entertainment officers; students) and a stakeholder action plan developed to target each group. This would allow for tailored engagement and informed decision-making. In this example, it would allow the council to identify all of the stakeholders it needs to engage with, reach out to these audiences, either through a survey or a focus group or other consultation mechanism, find out what those groups think of the idea; why they are not using the town / opening on a Sunday; what would encourage them to change their behaviour, and if they have alternative ideas to reach the same end.

Stakeholder engagement

It is recommended that key stakeholders, as well as representatives from the Council, be involved in the development of the marketing strategy. They should also be encouraged to use the agreed messaging and branding (as per guidance, terms and conditions) in their own communication about Dún Laoghaire.

Implementation

Successfully implementing a brand marketing strategy requires a strategic approach, investing time and resources in the activities that will yield the greatest return, based on the overall strategic objectives of the Study. This requires alignment with council and national growth policies, as well as proper resourcing and strong leadership – both from within the council and from key stakeholders. The strategy should be reviewed and evaluated on an ongoing basis to ensure that it continues to deliver and remains fit for purpose.

Marketing plan

As part of the marketing strategy development process an annual – or multi-annual – marketing plan should be developed for Dún Laoghaire. This should include all marketing opportunities for the year (local, national, and international), noting that not all opportunities will receive full marketing support. This would provide a coherent, long-term plan, where strategic decisions can be made as to how best promote the town, where to invest resources and where more light-touch promotion will suffice.

Communications Platforms

For consistency, all marketing for Dún Laoghaire town should be developed through the lens of the brand marketing strategy – complemented by the Council's wider marketing, if required. As part of the ongoing promotion of Dún Laoghaire as a desirable town, the full marketing communications mix is recommended to be considered, including public relations and publicity; events and experiences; direct marketing; advertising; personal selling and interactive marketing.

In particular, the following:

Dúnlaoghairatown.ie website and associated social media: Aimed at all stakeholders, outlining why Dún Laoghaire is a desirable town for their particular interest. We are aware that Dún Laoghaire-Rathdown County Council already supports the Dún Laoghaire Town website, and this, if desired and possible (ownership etc would need to be interrogated), could be used as the starting point for a new brand. In this instance, we would recommend the redevelopment of the current website, to a clean and streamlined landing page, which would showcase all that Dún Laoghaire had to offer – for the potential resident, businessperson, or visitor (out of town or day-tripper) – clearly indicating the tab they need to click on to find the most relevant information for their needs. The landing page should be home to the town's overall narrative, along with a new video, fulfilling the

marketing objectives for the town and portraying it in its best light, bringing people from the harbour into the town. For those looking for a more long-term relationship with the town, the site would serve to accentuate the 'why Dún Laoghaire'.

Ezine newsletter: Aimed at local stakeholders, the purpose of this would be to keep them in the loop on progress and associated initiatives that may be of interest to them. It would also encourage ongoing communication between them and the council.

Marketing collateral:

- **For local residents, workers / students and visitors:** This could include street marketing such as wayfinding street maps, carrying the narrative linking the town and the harbour, and pointing out points of interest in each; the promotion of the town's historic walking tour, with signage at heritage / history sites; lamp post banners; printed collateral aimed at tourists; a mobile app, providing such information in their pockets, regularly updated with events and activities happening in the town. This could also promote local bars, restaurants, and coffee shops.
- **For corporate marketing:** Aimed at investors and businesspeople, this would carry the appropriate messaging and should be available for use at corporate events.

Conferences / events / launches / roadshows: For corporate marketing.

Advertising: Including print, broadcast, online and on-street advertising. The advertising platform selected, outlet and location for on-street marketing would depend on the target audience.

Ambassadors: The best advocates for any proposition are generally the individuals who can tell their story relating to that proposition. Therefore, we would recommend identifying ambassadors for the town who can tell their story in a compelling manner that would tie in with the overall strategy for the town. Such ambassadors – local businesspeople, residents, students – could talk about their experiences of the town and why they choose it / would recommend it. They could be deployed in marketing collateral, such as videos, brochures, and the website, as well as speaking opportunities to champion the town and why they have chosen it for their specific venture. Video testimony could also run as a targeted social media campaign, as part of a wider public relations campaign.

During the high season summer months, in partnership with the relevant operators, a 'welcome team' could be deployed to the train station, and the pier, welcoming visitors to Dún Laoghaire and providing information about what to do and where to go to make the most of their visit to the town. In branded Dún Laoghaire town gear, they would also stand out as ambassadors for the town.

Public events and activities: As well as the opportunities provided by initiatives proposed in this document, the various local objectives for Dún Laoghaire set

out in the draft County Development Plan 2022 – 2028 are noted. Each of these, should they come to pass, should be considered for promotion under the brand marketing plan for the town. Some of them will provide smaller, annual opportunities e.g. promotion of the walking and cycling route between Dún Laoghaire and Dalkey; promotion of the harbour as a public amenity; others, such as development of an open seawater pool at the baths site or a cultural and heritage centre in the harbour should provide the opportunity for more extensive and deeper communication with stakeholders across the board.

The streetscape: Marine Road is currently the main thoroughfare between the harbour and the town. A long, wide street, its potential for a public art trail and activities should be considered to draw people from the harbour to the town.

Targeted interventions: Many of the recommendations to make Dún Laoghaire a more desirable town could be supported by a comprehensive marketing and communications campaign – either a public campaign or targeted stakeholder outreach. Among the ideas that could be included in the recommended marketing plan are:

→ **Dún Laoghaire as a day-to-night destination** – developing a programme of events for the town centre area, including evening events, to encourage people to visit and linger in the town. These could be promoted via the Dún Laoghaire Town website and on social media, as well through active marketing in the town and in the harbour. This could include through

posters; branded signage, or town ambassadors / greeters at the train station.

→ **Dún Laoghaire's open-air gallery:** Building on Dún Laoghaire's Street Art Project, a street art trail could be developed, telling the story of the various pieces of art and the artists, and encouraging viewers to continue on the trail. This could be both housed as a map on the app / website, as well as through branded information notices at each point. To further enhance the experience, the artists could be asked to record a short clip of them talking about their piece, which could be housed on the app / website.

→ **Dún Laoghaire Open for Business / Shop Local Campaign:** In the audience mapping element of this section of the document, it is recommended there be targeted public consultation to inform decision-making in an initiative to encourage retailers to extend their opening hours and adopt Sunday opening; as well as exploring why students don't tend to use the town and what would encourage them to do so. The findings from this public consultation could be used to develop a marketing message to encourage retailers to get on board. Once the details of the initiative had been agreed and key target audiences identified, a marketing campaign could be developed to alert shoppers and patrons to the changes. A number of targeted campaigns could be housed within this campaign e.g. Student specials at cafes, restaurants and bars (target market: students); Dún Laoghaire from morning 'til night – highlighting early opening and late closing establishments in the town

(target market: everyone and all adult demographics; residents; business people; visitors etc.); Harbour walk and dine: Clear your head with a walk by the sea and then sate your appetite with a bite in town (target market: residents and visitors): Dún Laoghaire: come for the fresh air, stay for the X.

→ **While Dún Laoghaire has developed a strong reputation as an events town, this has never translated into a viable night-time economy.** In an effort to address this, it is recommended that DLRCC programmes smaller activities, such as barista competitions; music, or food, around national and large events such as the Mountains to Sea Festival, national and international sailing events, and the Red Bull harbour events to include other smaller activities aimed at increasing footfall in the town. Depending on their construct, these programmes could be marketed in tandem with the wider event – providing a partnership opportunity but should be in line with the Dún Laoghaire marketing strategy. They should be included in the marketing plan for the town.

→ **DLR Festival of the Sea:** Dún Laoghaire's key asset is the sea – whether that be to go for a walk on the pier, to sail, to fish or to take part in water sports. In the spirit of unifying the town and harbour, the Council could work in partnership with business-owners in the harbour area and in the town to develop a Festival of the Sea, which would encourage people to try out the various activities on offer in the harbour and then to go into the town for something to eat. This initiative could be marketed to both residents and visitors.

Public relations campaign: A public relations campaign should be developed, alerting people to what they can expect from Dún Laoghaire in the coming years. While ostensibly focusing on the new vision for the town, it should also look at what has already been achieved, such as the placemaking success the Council has already achieved, and what benefit the various cohorts can expect to see through the implementation of the Study. It should be noted that this would precede the development of a brand identity and marketing plan and would utilise the Council's existing public relations capacity. It would most likely take the form of a targeted media relations campaign, with significant positioning pieces in relevant national media, and a targeted social media campaign, along with direct outreach to key stakeholders via the recommended e-zine newsletter.

It is recommended that DLRCC consider procuring a communications specialist to help it to develop a comprehensive marketing strategy and implementation plan for Dún Laoghaire that will promote Dún Laoghaire as a desirable town and will resonate both with the local community and the wider audience it is trying to attract to the town. The brand identity and the marketing strategy should be aligned; therefore, we would recommend initiating the brand identity strategy first, immediately followed by the development of the marketing strategy. While the final cost of developing a marketing strategy will depend on the agreed scope of the project, an estimated budget would be in the region of €15,000 – €20,000 ex VAT.

THEME 1: FOUNDATIONS FOR A STRONG ECONOMY

	Action	Lead	Partners	Timeframe	KPI
Pillar 1: Places for People					
01.01	Project 1: Enhancing streets and public spaces New Urban Design Guide and Public Realm Strategy to be prepared supplement the existing Urban Framework Plan and to provide a framework for subsequent applications to the URDF for future funding.	DLRCC		2022	New Urban Design Guide and Public Realm Strategy prepared Applications made for URDF funding Public realm measures delivered
01.02	Project 2: Enhancing town and harbour linkages Continue to explore opportunities for further connectivity between town and harbour.	DLRCC		2022-2023	Connectivity enhancement options considered
01.03	Project 3: Continued Maintenance of Public Spaces Continued engagement with community and businesses on maintenance of public spaces	DLRCC	Tidy Towns Local businesses Local community Building owners	2022	Metric: Increased Tidy Towns score
01.04	Project 4: A legible town – wayfinding plan State-of-the-art wayfinding strategy for the town and harbour	DLRCC	Third party provider	2022	Way-finding strategy commissioned and implemented
01.05	Project 5: Beautiful shopfronts Continue to encourage and facilitate shopfront enhancement	DLRCC	Local businesses	Ongoing	Metric: Annual increase in shopfronts enhanced

	Action	Lead	Partners	Timeframe	KPI
Pillar 2: A vibrant and creative town					
02.01	Project 6: Increase student population Set up steering group to facilitate re-use of key publicly owned buildings i.e. Carnegie Library, Loreto Senior College and the building next to the former fire station at Bentley Villas/ Kellys Avenue for the educational, innovation, student, art and community uses.	DLRCC	IADT Management Dún Laoghaire Education and Training Board ArtNetdir	2022-2023	Metric: Number of students studying and living in the study area, number of artists using Creative Hub
02.02	Project 7: Produce a Dún Laoghaire Local Area Plan Produce a new Dún Laoghaire Local Area Plan for town and harbour Rezoning of key opportunity sites for commercial use Continued support for mixed use development	DLRCC		2022-Ongoing	Metric: Dún Laoghaire Local Area Plan produced Annual increase in availability of commercial/retail floorspace in the study area



Chapter seven

DELIVERY ROADMAP

Action	Lead	Partners	Timeframe	KPI
Pillar 2: A vibrant and creative town				
02.03 Project 8: An animated Dún Laoghaire – town and harbour Develop a defined programme of events for the town centre Consider car-free Sundays and seasonal holidays on Upper George's Street and the southern end of Marine Road to create spaces for events and street entertainment. Explore opportunities to link Upper Georges Street and Marine Road to Lower Georges Street for summer and Christmas seasons. Seek and encourage temporary/meanwhile uses for vacant buildings Continue to encourage and incentivise street art Identify opportunities to link and animate routes between town and harbour along pedestrian corridors	DLRCC	Town Team Event management companies Building owners Service providers	2022-Ongoing	Metric: Number of town events
02.04 Project 9: A safer town Consider ways to address anti-social behaviour and the perception of anti-social behaviour	Local Policing Forum	Town Team	Ongoing	Metric: reduced anti-social behaviour incidence reporting or improved sentiment

Action	Lead	Partners	Timeframe	KPI
Pillar 3: A resilient town				
03.01 Project 10: Using technology Implement Variable Message Signage and smart car parking technologies for Dún Laoghaire town centre Continue the current programme of installing smart bins, smart lighting and footfall counters in Dún Laoghaire town centre Prioritise installation of smart ev charging points for electric vehicles on the outskirts of the study area.	DLRCC		2022-2023	Metric: Number of car journeys in DLR town centre Metric: number of smart bins and lampposts, number of EV charging points

THEME 2: SUPPORTING EXISTING & ATTRACTING NEW BUSINESSES

Action	Lead	Partners	Timeframe	KPI
Pillar 4: Developing partnerships				
04.01 Project 11: Creating spaces for business Consider mechanism and opportunity for collaboratively developing enterprise spaces in a strategic manner in DLR town centre for lease, targeted to creative and digital businesses in Dún Laoghaire town, County, Dublin City, and the EMRA Region.	DLRCC-IADT DAC vehicle	LEO Enterprise Ireland Chamber of Commerce Dún Laoghaire Business Association Town Team	2022-2025	Metric: The number of Co-working spaces are sufficient to meet the needs of current and future employment

Action	Lead	Partners	Timeframe	KPI
Pillar 4: Developing partnerships				
04.02 Project 12: Support the strategic growth of co-working centres Strategically develop co-working spaces potentially in collaboration with third parties	DLRCC	Private sector providers	2022-Ongoing	Metric: The number of Co-working spaces are sufficient to meet the needs of current and future employment

Action	Lead	Partners	Timeframe	KPI
Pillar 5: Incentives and supports				
05.01 Project 13: Enterprise supports Promote enterprise supports to existing and new businesses as part of a promotional campaign for Dún Laoghaire town centre Consider a range of grant incentives to encourage new businesses to invest in Dún Laoghaire town.	DLRCC	LEO Enterprise Ireland Chamber of Commerce Dún Laoghaire Business Association	2022-Ongoing	Metric: number of businesses in Dún Laoghaire town

THEME 3: A DESIRABLE TOWN

Action	Lead	Partners	Timeframe	KPI
Pillar 6: A Unifying Brand				
06.01 Project 14: Unifying brand for town and harbour Procure a brand development specialist to help develop a unifying brand for Dún Laoghaire	DLRCC	Third party service provider	2022-Ongoing	Branding project implemented

Action	Lead	Partners	Timeframe	KPI
Pillar 7: Changing Perceptions				
06.02 Project 15: Promoting the positives Procure a communications specialist to help develop a comprehensive marketing strategy and implementation plan for Dún Laoghaire	DLRCC	Third party service provider	2022-Ongoing	Marketing strategy and implementation plan implemented Metric: number of businesses in Dún Laoghaire town



03
03



Chapter eight

MONITORING AND EVALUATION

MONITORING AND EVALUATION

Any elements of this study that are agreed to be acted on will be required to be reviewed on an annual basis.

Several metrics of success have been identified in the Delivery Study. These include:

- Project 3**
Increased Tidy Towns score
- Project 5**
Annual increase in shopfronts enhanced
- Project 6**
Number of students studying and living in the study area, number of artists using Creative Hub
- Project 7**
Annual increase in availability of commercial/retail floorspace in the study area
- Project 8**
Number of town events
- Project 9**
reduced anti-social behaviour incidence reporting or improved sentiment
- Project 10**
Number of car journeys in DLR town centre/ number of smart bins and lampposts, number of EV charging points
- Project 11**
The number of Co-working spaces are sufficient to meet the needs of current and future employment
- Project 13 and 15**
number of businesses in Dún Laoghaire town

APPENDIX 1: CONSULTEES

Appendix 1: Consultees

KPMG Future Analytics would like to acknowledge the help and guidance of the many people we have spoken during the project. This includes the stakeholders listed below that were contacted during January to April 2021.

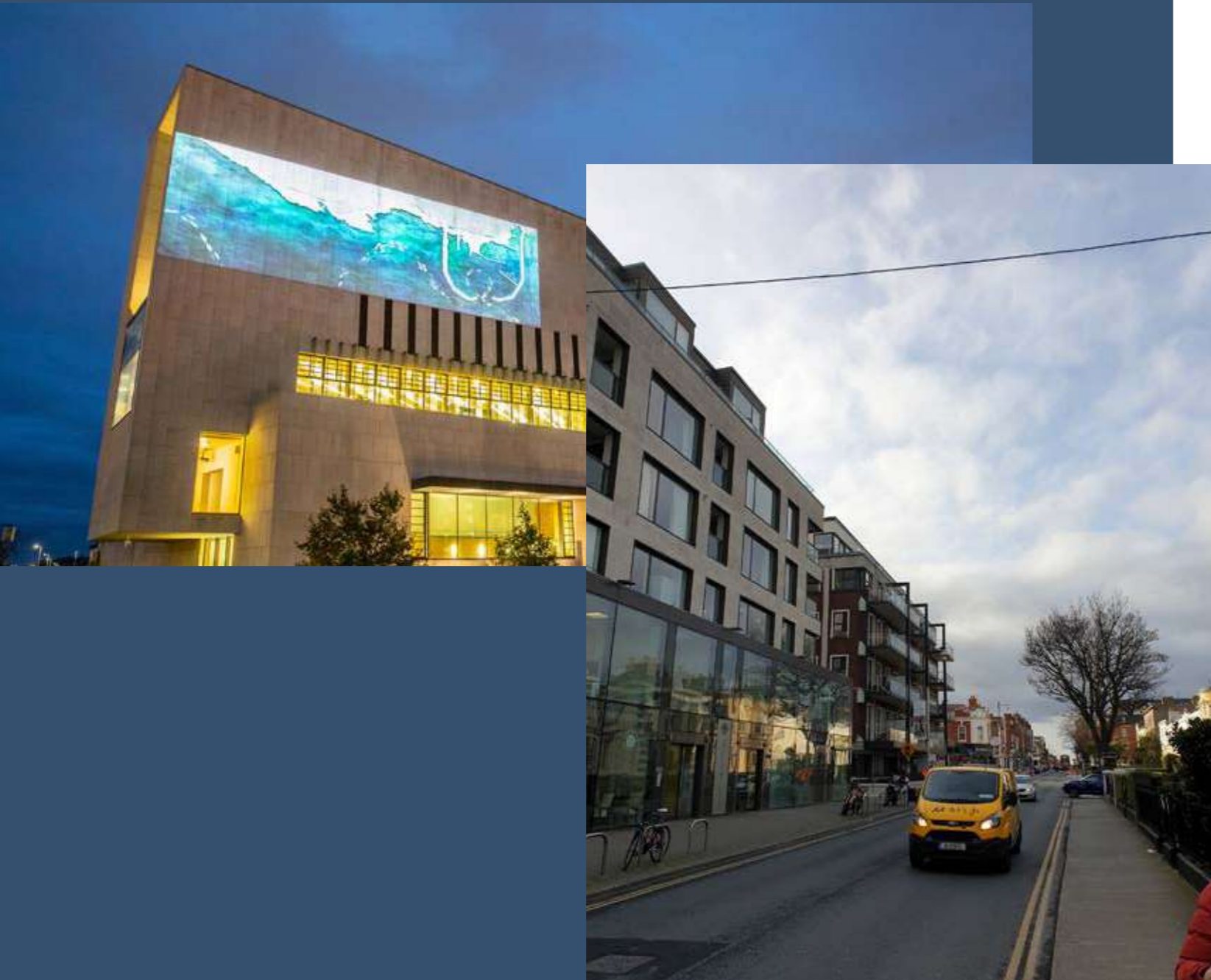
- Dún Laoghaire-Rathdown County Council
- Dún Laoghaire Town Team
- Dún Laoghaire Chamber of Commerce
- Dún Laoghaire Central Residents Association
- Dún Laoghaire Business Association
- Dún Laoghaire Institute of Art, Design and Technology (IADT)
- Dún Laoghaire Shopping Centre
- Bloomfield's Shopping Centre
- DigitalHQ
- Dunnes Stores
- Royal Marine Hotel
- Haddington House
- An Garda Síochána
- Enterprise Ireland
- IDA Ireland
- ArtNetdlr
- ESRI
- St. Michael's Parish

KPMG Future Analytics would also like to thank those who kindly completed the community and business online surveys that were issued in February 2021 for a period of four weeks.

A total of 821 responses were received for the community survey and 188 responses for the business survey and this has provided a solid evidence base for the Study.



APPENDIX 2: SITUATION ANALYSIS DETAIL



Appendix 2: Situation Analysis Detail

A2.1 Introduction

The following situation analysis provides the results of an analytical and qualitative analysis utilising the best available data on demography, households, economic activity and employment, travel patterns and connectivity - all with the intention to provide a baseline analysis for the Spatial and Economic Study for Dún Laoghaire Town.

Data has been collected and analysed on the following:

- Population (current and future)
- Households and Housing Characteristics
- Socio-economic profile (economy, employment, education etc.)
- Commuting and Transport
- Workplace Zones
- Planning application trends
- Land use survey
- Vacancy Rate analysis
- Tourism and Events
- Community and Business Groups

We have utilised established and reliable data sources including for example, CSO, POWSCAR, GeoDirectory, Commercial Rate data, Pobal Deprivation Index, and any specialist studies carried out by or on behalf of Dún Laoghaire Rathdown County Council, relevant NGOs, or key industry stakeholder groups provided. Key components include population and age composition, household types, population projections, analysis of the structure and character of the local economy, principal socio-economic activities and sectoral strengths, workforce / employment characteristics, retail diversification, property occupancy and vacancy rates, tourism and recreation assets. As part of this situation analysis, a review of Dún Laoghaire's historical background has been undertaken. Where possible CSO Census 2016 data has been aggregated with up to date regional departmental and state agency datasets data to provide a current view of each element of the Profile.



A2.1.1 Map of Study Area

A2.1.1 Dún Laoghaire Town's Historical Context

The origin of Dún Laoghaire Town's name is derived from reference to the fort (Dún) of Laoghaire Mac Néill, a 5th Century High King of Ireland, perhaps where the footbridge over the railway to the Coal Harbour is now located. Early maps show a small fishing village near the old harbour and close to the current site of the Purty Kitchen. The site of the fort is thought to have been replaced firstly by a Martello Tower in 1803, and subsequently by the world's first suburban railway in 1834, with no trace of the fort remaining on site. Some stone from the original fort is preserved in the Maritime Museum¹⁵. However, the site of the fort is disputed by historians who indicate that no traces were found when the same site was excavated in 1836.¹⁶

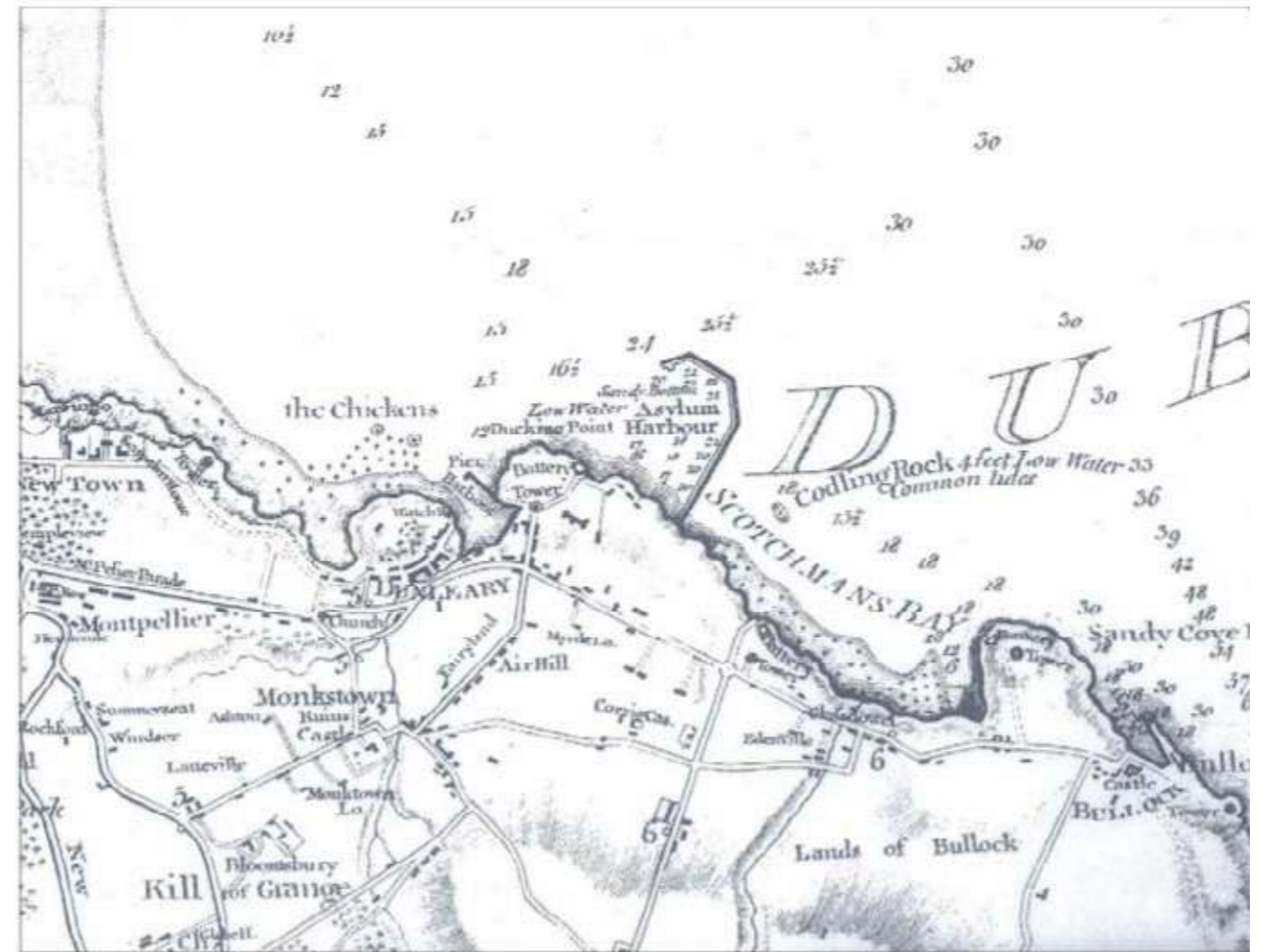
The early town grew along what is now Cumberland Street near the junction with York Road and was known by its anglicised name of Dunleary. An 1804 map¹⁷, Figure A2.1.1 2, shows a road along the line of current day Georges Street which is believed been laid out to link the Martello Towers at Coal Harbour, People's Park (later demolished) and Sandycove¹⁸. A larger settlement was built following the 1816 legislation to enable the building of a major port to serve the city of Dublin. The lines of George's Street and adjoining roads are shown on an 1816 map, shown in Figure A2.1.1 3. The potential of the area, associated with a major port, would have been clear at the time.

By the 1830's, Georges Street is thought to have been fully occupied¹⁹. The settlement was renamed Kingstown in honour of King George IV's 1821 visit, and in 1920 reverted to its former name in the lead up the creation of the Irish Free State, with the name now in the Irish form. Construction of the harbour between 1817 and 1859 and the opening of the railway in 1834 established Kingstown as an appealing suburb of Dublin and a fashionable seaside resort with many buildings being completed during this time.



A2.1.1 1 1804 Map (Source History Ireland)

Dún Laoghaire Town was the commercial heart of the county from the early 1900's to the early 2000's, and George's Street a thriving bustling street, when competition and a shift in retail trends are believed to have had a negative impact on the vitality of the area²⁰. Issues facing Dún Laoghaire Town are common to many other towns in Ireland, the UK and Mainland Europe. Solutions to maximise commercial opportunity and revitalise Dún Laoghaire can be drawn from many different locations.



A2.1.1 2 1816 Map with route of George's Street Shown (Source: Dun Laoghaire Harbour Heritage Management Plan 2011)

15 - <https://web.archive.org/web/20131017195813/http://www.dunlaoghaire.ie/dun-laoire-dun-leary-or-dun-laoghaire-how-theharbour-town-got-its-name/>
 16 - <https://irishmartellotowers.wordpress.com/locations-southdublin/>
 17 - <https://www.historyireland.com/18th-19th-centuryhistory/dun-laoghaires-great-harbour/>
 18 - <https://irishmartellotowers.wordpress.com/locations-southdublin/>
 19 - https://localwiki.org/dl/Lower_George%27s_Street

20 - https://localwiki.org/dl/Lower_George%27s_Street

A2.2 Baseline Analysis

A2.2.1 Population Characteristics

The study relates to the core urban area of Dún Laoghaire Town. According to the 2016 Census figures analysed for this assessment, the study area's population of 5,770 decreased by 2% from the 2011 Census count, compared to a 5.7% increase in the wider county's population. The decline in the residential density of the town centre is also noted in other towns, but that can perhaps be linked to rising property prices in the coastal areas of south-east Dublin driving people to live further south and west. The wider Dún Laoghaire Local Electoral Area (LEA) grew from 40,852 persons to 41,627 persons between 2011 and 2016, even though the LEA area was reduced following boundary changes.

Figure A2.2.1-1 shows the population age composition of the study area in Dún Laoghaire Town. Proportionately the study area has the majority of its population above the ages of 25 with a noticeable dip in the pyramid between the ages 10-24, despite the decrease of 7.8% in people aged between 35-39 in the study area, this cohort still had the largest portion of the population. Two other notable decreases were 20-29 by 26.9% and 80+ by 17.4%. Notable increases include 60-69 by 24.3% and 0-9 by 11.7%.

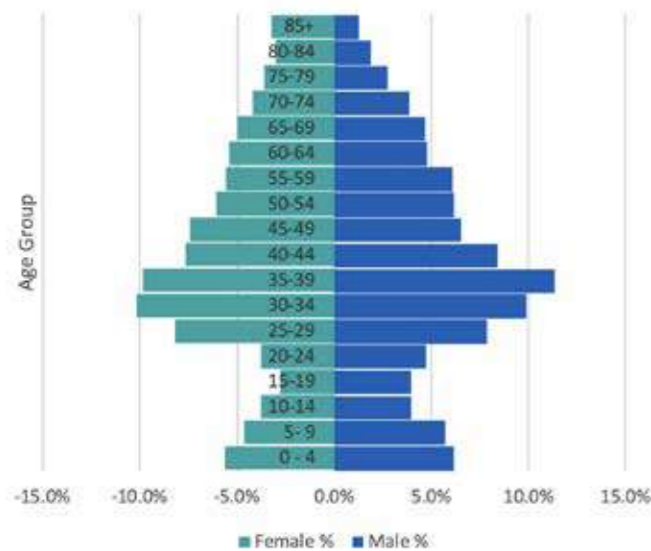
An important indicator for future community and employment requirements is the age structure of the area. Approximately 68% (3,941 people) of the population were aged 15 to 64 in 2016, in which broadly represents the labour force for the town. This large cohort is a key driver of the economy, and

The socio-economic profile for Dún Laoghaire has indicated that the town will experience a small amount of population growth up to 2040. By 2040, the projected population for Dún Laoghaire is 6,081, which is a 5.7% increase on the numbers recorded in 2016. The town has an average age and age dependency well below the state average, however since 2011 the student population has declined by almost 10% and the retired population grew by 2%, which highlights the towns ageing population.

A2.2.2 Population Change 2011 - 2016

Table A2.2.2 1 below indicates the breakdown of the study area population by school going, adult and senior/retired age groups. The age groups 0-14 increased by 2.4% while the age groups between 15-64, which is associated with the working population, fell by 3.2%. The age groups 65+ increased by 0.8%.

The nationality of the study area had significant changes between 2011 and 2016, the most striking statistic is that the number Foreign Nationals fell by 11.2% with residents from Poland representing the biggest change of -34.6% between 2011 and 2016.



A2.2.1.1 Dún Laoghaire Town Population Pyramid (CSO, 2016)

Population age groups [CSO]			
Age	2011	2016	Change
0 - 9	571	638	11.7%
10-19	402	415	3.2%
20-29	967	707	-26.9%
30-39	1289	1189	-7.8%
40-49	787	868	10.3%
50-59	676	689	1.9%
60-69	461	573	24.3%
70-79	402	416	3.5%
80+	333	275	-17.4%
Total	5888	5770	-2.0%

A2.2.1.2 Population age groups 2011-2016

their importance cannot be understated. Having a substantial proportion of a population fall within this cohort is vital to an economy, no matter what the scale. It is, therefore, important that this age group have access to vital accommodation, retail, and social infrastructure benefits within the town.

Dependency ratios are used to give a useful indication of the age structure of a population with young (0-14) and old (65+) shown as a percentage of the population of working age (i.e. 15-64). Dún Laoghaire has a relatively high dependency rate for an urban town within the Dublin Metropolitan Area (46.4%) but is still below the state average in 2016 of 52.7%. However, the CSO notes that dependency ratios are a rather crude measure as variations occur over time due to the number of young people in third level education and people over 65 continuing to work.

Age	2011 No.	2011%	2016 No.	2016 %
0-14	737	12.5%	860	14.9%
15-64	4,210	71.5%	3,941	68.3%
65+	941	16.0%	969	16.8%

A2.2.2.1 Population Change 2011-2016

Usually resident population by nationality [CSO]			
Nationality	2011	2016	Change
Ireland	4,134	4,016	-2.9%
UK	164	148	-9.8%
Poland	335	219	-34.6%
Lithuania	15	18	20.0%
Other EU 28	305	396	29.8%
Rest of World	584	465	-20.4%
Not stated	118	164	39.0%
Total	5,655	5,426	
Foreign Nationals	1,403	1,246	-11.2%
Foreign Nationals %	25%	23%	

A2.2.2.2 Resident Population by Nationality

A2.2.3 Population Projection Analysis

Planning pipeline analysis shows that since 2016 the study area has had 8 major residential applications (10+ units) granted totalling 451 units with three of these developments having commenced with a unit total of 54.

Using the average household size for the study area in 2016 of 2.27, the granted residential developments would equal approximately an additional 1,024 persons in the study area assuming all granted applications will be completed. The developments already commenced will result in approximately an additional 123 persons.

A2.2.4 Households and Housing Characteristics

Trends in household data from the intercensal period for the study area summarized in the Table A2.3.4 1.

As indicated in Table A2.3.4 1, there is significant change between household compositions as recorded for the study area between 2011 and 2016. Although single person households fell by 14.8%, this household category makes up 33.8% of the households for the study area in 2016. Together with 'Married couples and children', the two composition types make up more than half of all households in the study area (in line with the State figures). Some significant changes include a 29.6% increase in 'Couple, Children and others', a 20.8% increase in 'Cohabiting couple and children', and a 29.2% decrease in 'Two or more family units'. Overall, there was a 5.5% decrease in the number of households in the study area, combined with the slight decrease of population, resulted in an increase in the average household size of 6.3% from 2.13 in 2011 to 2.27 in 2016.

The housing stock in the study area has changed slightly between 2011 and 2016. House/Bungalows increased by 2.6% of the total housing stock and Flats/Apartments increased by 1.3% of the same.

Composition of Households	2011	2016	Change	2016%
One person	915	780	-14.8%	33.8%
Married couple	295	294	-0.3%	12.7%
Cohabiting couple	230	188	-18.3%	8.1%
Married couple and children	393	476	21.1%	20.6%
Cohabiting couple and children	48	58	20.8%	2.5%
Father and children	31	24	-22.6%	1.0%
Mother and children	183	155	-15.3%	6.7%
Couple and others	49	41	-16.3%	1.8%
Couple children and others	27	35	29.6%	1.5%
Father children and others	2	8	300.0%	0.3%
Mother children and others	21	23	9.5%	1.0%
Two or more family units	24	17	-29.2%	0.7%
Non-family households and relations	72	66	-8.3%	2.9%
Two or more non-related persons	153	144	-5.9%	6.2%
Total	2443	2309	-5.5%	

A2.2.4 1 Household composition

Housing stock information [CSO]			
Housing stock	2011	2016	Change
House/Bungalow	47.2%	49.8%	2.6%
Flat/Apartment	46.8%	48.1%	1.3%
Bed-sit	2.0%	1.4%	-0.6%
Caravan/Mobile Home	0.1%	0.1%	0%
Not stated	3.8%	0.6%	-3.2%

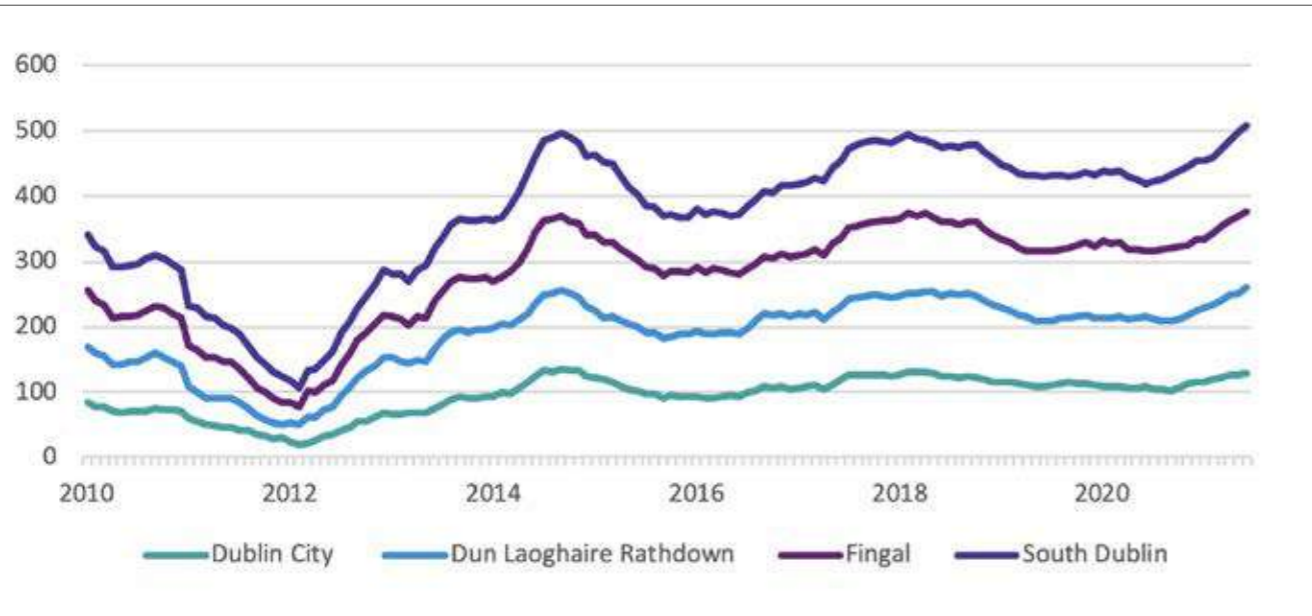
A2.2.4 2 CSO Housing Stock Information

The total number of vacant dwellings in the study area decreased between 2011 and 2016, Vacant dwellings within the study area decreased by 33% between this time, while the number of occupied dwellings reduced by 6%.

Occupancy status of permanent dwellings [CSO]			
Status	2011	2016	Change
Occupied dwellings	2473	2328	-6%
Temporarily absent	-	123	-
Unoccupied holiday homes	-	7	-
Vacant dwellings	489	328	-33%
Total	2962	2786	-6%

A2.2.4 3 Occupancy status

A2.2.5 Residential Property Price index



A2.2.5.1 Dublin County Residential Property Price Index, (CSO, 2021)

The CSO's Residential Property Index measures the average level of prices paid for properties in Ireland, using an index figure the effects of varying property characteristics can be discounted. The data tracked within the index are all dwellings purchased by households in the residential property market. The principal variables used in modelling the index are the purchase price, total floor area, dwelling type, geographical location and deprivation index.

Residential property prices (houses and apartments) in Dún Laoghaire-Rathdown have increased by 3.36% over a ten-year period from 2010 to 2020, further increasing by 1.75% within the first 6 months of 2021, representing a sharp increase in house prices in 2021. Within Dublin county residential property prices increased by 6.4% over a year period to June 2021.

A2.2.6 Education

There are three third-level educational institutes within the town of Dún Laoghaire and surrounding area, including Dún Laoghaire Institute of Art, Design and Technology, Dún Laoghaire Further Education Institute and Sallynoggin College of Further Education, as follows:

- Dún Laoghaire Institute of Art, Design and Technology (IADT), is located on Kill Avenue less than two kilometres of the town centre and is the largest third-level institution in the Dún Laoghaire area. With a presence in the area spanning almost sixty years, IADT enrolls over 2,500 students in a range of courses in the creative arts and media.
- Dún Laoghaire Further Education Institute (formerly Dún Laoghaire College of Further Education) is located on Cumberland Street and is located less than 500 metres from Dún Laoghaire town centre. It offers both day and evening further education courses and enrolls approximately 800 full-time students.
- Sallynoggin College of Further Education (SCFE) is in the nearby town of Sallynoggin and is located roughly two kilometres from Dún Laoghaire town centre. SCFE offers a range of further education courses and has partnerships with nearby local facilities including the Pavilion Theatre and DLR Leisure Services in Monkstown and Loughlinstown. Other important third-level institutions which play into the vibrancy of the county include University College Dublin, Stillorgan College of Further Education and Blackrock Further Education Institute.

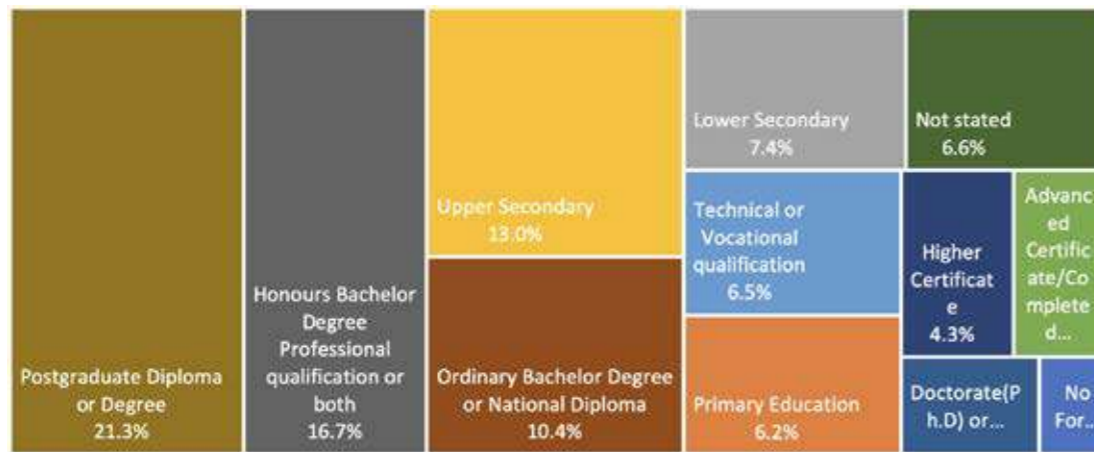
Nearby secondary schools outside of the town include Rockford Manor Secondary School, Newpark Comprehensive School, Rathdown School, Loreto Abbey Dalkey and Clonkeen College. There are also several primary schools within the town of Dún Laoghaire and others more proximate to the town within the surrounding areas. Dominican Primary School is the most established school within the town, having opened in 1847 and undergoing several name and property changes. The school caters for both boys and girls. St. Joseph's National School is also long-established school in Dún Laoghaire and caters for both boys and girls. Monkstown Park Junior School is located on the grounds of C.B.C Monkstown and acts as a 'feeder school' for the secondary school. The school caters for both boys and girls. Nearby primary schools include The Harold School, Glasthule; Dún Laoghaire Educate Together National School, Monkstown; Monkstown Educate Together National School, Kill Avenue, and; St. Oliver Plunkett National School, Monkstown, which caters for children with learning difficulties and is one of four special schools in the state. These primary schools enrol over 2,500 students and provide an important service to Dún Laoghaire in the early childhood development of its local communities.

Education attainment levels, or the highest level of education a person receives, can offer further insight into the composition of a local population. Although higher education levels do not necessarily result in higher salaries, there is certainly a correlation between the two, with education often linked to improved employment opportunities. Therefore, if higher education attainment levels are identified, it is suggested that residents of this area are in positions where they can demand higher salaries and consequently seek out a greater range of housing options.

Figure 2.2.6-1 charts the levels of education attainment by the population of Dún Laoghaire Town study area, aged 15 or over, as of 2016. The highest proportion are those who studied until 'Postgraduate Diploma or Degree' and this category represents 21.3% of the total. A large proportion of the study areas adult population, approximately 51.1% of people, have attained a qualification that is at minimum a 'Level 7' on the National Framework of Qualifications (NFQ)²¹. A level 7 NFQ qualification refers to an Ordinary Degree in a third level institute. Furthermore, 24.1% of the population have achieved a master's degree or higher, which is Level 9 on the NFQ. These figures are much higher than the State averages, where 28.5% of adults have attained a Level 7, while 10.1% have received a master's degree or above.

The population of study area has a very good level of education attainment and is substantially higher state averages when it comes to NFQ7 and above.

The level of education in the study area has increased between 2011 and 2016 with more of the population obtaining higher levels of education and less of the population obtaining 'Up to Leaving Cert' or lower.



A2.2.6.1 Levels of education attained in Dún Laoghaire Town (2016)

Education Level	2011	2016	Change
Masters of Higher	827	978	18.3%
Third Level (Level 7+)	1928	2076	7.7%
Third Level (Level 6+)	2263	2395	5.8%
Up to Leaving Cert	1446	1133	-21.6%
Primary or Less	454	305	-32.8%

A2.2.6.2 Levels of educational change in Dún Laoghaire Town (2016)

21 - The National Framework of Qualifications (NFQ) is a system of ten levels used to describe the Irish qualifications system. The NFQ is based on standards of knowledge, skill and competence and incorporates awards made for all kinds of learning, wherever it is gained. More information available at: <https://nfq.qqi.ie/>

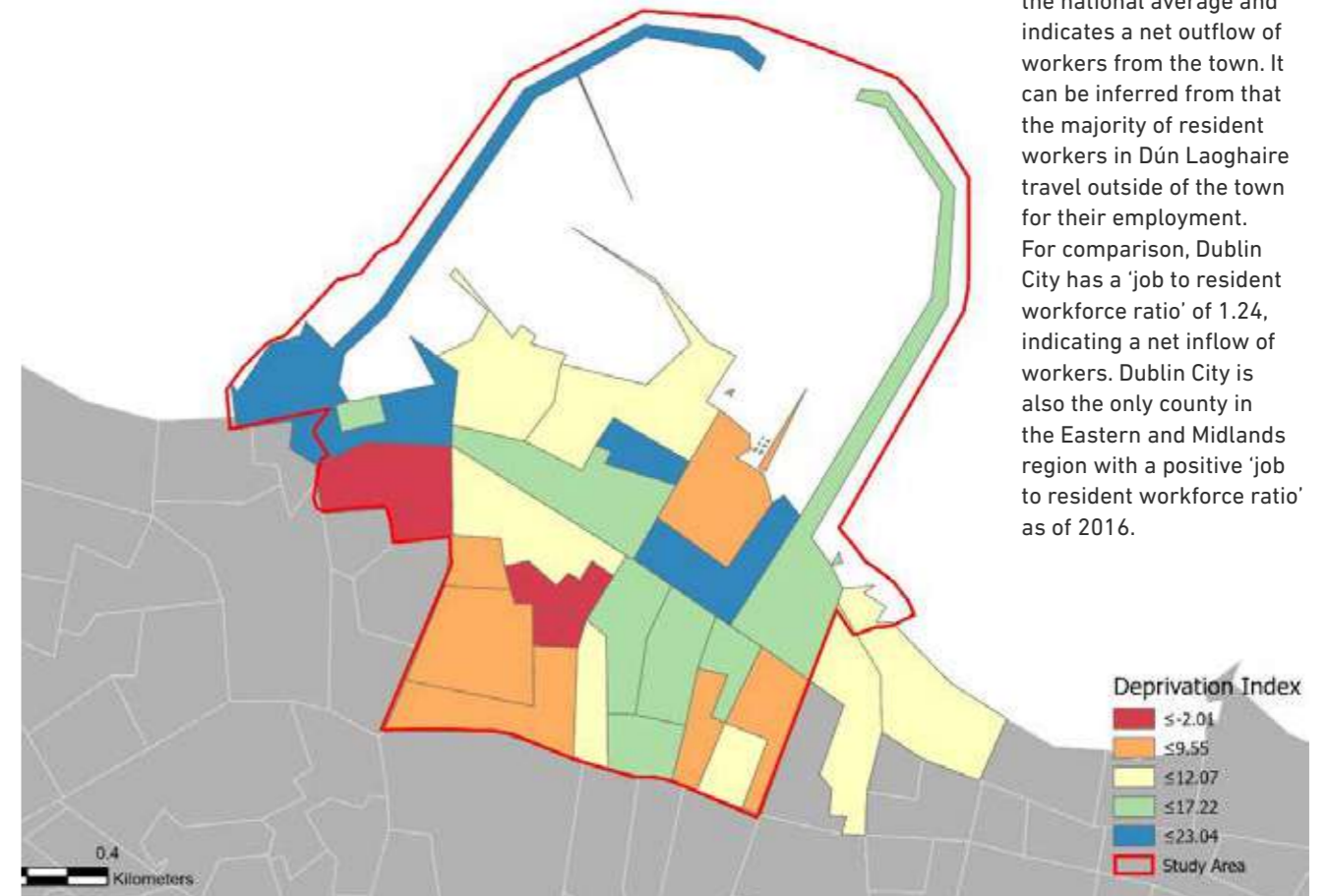
A2.2.7 Economic Activity & Employment Centres

There are several large employers within the town. The town is home to the national headquarters of Lionbridge Ireland, a professional services company, and Bord Iascaigh Mhara (BIM), Ireland's seafood development agency. The national headquarters for Tesco Ireland, as stated previously, is located in Dún Laoghaire Shopping Centre, employing over 450 staff, with a nearby anchor store located in Bloomfield's Shopping Centre. Supervalu and Dunnes Stores, both supermarket chains, have anchor stores within Dún Laoghaire Shopping Centre and along George's Street Upper respectively.

The 'labour force participation' rate of the study area was 79.98%. This is significantly higher than the national average of 61.4%. An interesting point is that, even with a high percentage of retirees living in the study area at 17.6% (which would usually impact the results), the 'labour force participation' rate is still very high. Although using this rate as a metric to measure employment levels can be crude, it gives an insight into the study areas strong labour force.

For an overview of the relative deprivation rating and profile of an area, the Pobal HP Deprivation Index is referenced. Pobal maps are used to provide area deprivation profiling. The use of the relative index shows how performance in an area relates to all other areas at that point in time, by using the latest census data. The Colour shading of the map is based on the level of deprivation, which ranges from Extremely Affluent to Extremely Disadvantaged according to the Pobal HP Deprivation Score of each Small Area (SA) (but is displayed at Electoral Division Level). The Relative HP Deprivation Score shows the position of any given SA relative to all other SAs and is based on the latest available data from Census 2016. The use of the relative index shows how the performance of an area relates to all other areas at that point in time. With regard to social deprivation, the Pobal HP Deprivation Index shows that Dún Laoghaire has an exceptionally high score of 10.0. This is significantly higher than both the national (0.6) and Dublin (4.1) average.

The 'jobs to resident workforce' ratio is a useful metric to determine the commuting patterns of residents within an area with regards to employment. Dún Laoghaire had a job to resident workforce ratio of 0.68 in 2016. This is below the national average and indicates a net outflow of workers from the town. It can be inferred from that the majority of resident workers in Dún Laoghaire travel outside of the town for their employment. For comparison, Dublin City has a 'job to resident workforce ratio' of 1.24, indicating a net inflow of workers. Dublin City is also the only county in the Eastern and Midlands region with a positive 'job to resident workforce ratio' as of 2016.



A2.2.7.1 Deprivation Level for Small areas within the Study Area (Pobal, 2016)

A2.2.8 Principal Economic Status

The principal Economic Status of the study area residents aged 15 years or older is used to assess the level of economically active or inactive population. Persons or groups over 15 years of age not participating in the labour force are

typically students, home makers, retirees, and persons unable to work due to illness or disability and they are considered to not be economically active. The following tables provides an overview of the labour force in the study area.

Jobs Growth [CSO]			
	2011	2016	Change
Employed	2856	2899	1.5%
Economically active labour force	3325	3182	-4.3%
Unemployed	440	253	-42.5%
Not economically active	1826	1728	-5.4%

A2.2.8 1 Job Growth & Intercensal Change

The number of unemployed people in the study area decreased by 42.5% in the intercensal period accounting for 5.2% of the working aged population, which is below the state figure of 7% for the same period, while the number of employed people increased 1.5%.

Population aged 15 years and over by principal economic status and sex				
	2011	2016	Change	Difference
At work	2,856	2,899	1.5%	43
Looking for first regular job	29	30	3.4%	1
Unemployed having lost or given up previous job	440	253	-42.5%	-187
Student	442	400	-9.5%	-42
Looking after home/family	315	282	-10.5%	-33
Retired	849	866	2%	17
Unable to work due to permanent sickness or disability	213	156	-26.7%	-57
Other	7	24	242.8%	17
Total	5,151	4,910	-	-

A2.2.8 2 Principal Economic status change and different

The number of retirees increased by 2% making it the largest portion of the non-economically active population. This accounts for 17.6% of all persons aged 15 years and older, which is higher than the national figure of 15%. Despite a decline of 9.5%, students are third highest in the age group classification behind retirees and people at work. Students are generally those people who have just finished secondary school and are, therefore, quite a youthful cohort. Retaining this cohort, once their studies have been completed, could be essential for the local economy and important if Dún Laoghaire is to continue to grow and become a young, vibrant location. It is important, therefore, that new housing stock which meets the demand of the younger population is developed, allowing younger people from the locality to remain there. This housing stock should be varied and appropriate for young professionals and young

families. A large decrease of 10.5% can be seen in the number of people primarily 'Looking after home/family' in the study area.

The following table presents the level of employment for those employed in the study area.

Level of Employment	% Persons			
	2011	Summary	2016	Summary
A Employers and managers	19%		21%	
B Higher professional	12%		17%	
C Lower professional	17%	48.5%	17%	54.7%
D Non-manual	18%		18%	
E Manual skilled	5%		4%	
F Semi-skilled	7%		5%	
G Unskilled	2%		3%	
H Own account workers	4%	35.9%	4%	33.7%
I Farmers	0%		0%	
J Agricultural workers	0%		0%	
Z All others gainfully occupied / unknown	15%	15.6%	12%	11.6%
Total	100%		100%	

A2.2.8 3 Persons by socio-economic group of reference person

As seen in the table above, the level of employment in professional, skilled, and manual labour changed between 2011 and 2016. The change notes a move away from 'Semi-skilled', and 'Manual Skilled' towards more 'Higher professional' and 'Employers and managers' employment levels.

Persons at work by occupation [CSO]			
Occupation	2011	2016	Change
Managers Directors and Senior Officials	10.2%	9.9%	-0.3%
Professional Occupations	24.9%	28.6%	3.7%
Assoc. Professional & Technical Occupations	15.4%	16.2%	0.7%
Administrative & Secretarial Occupations	9.9%	9.9%	-0.1%
Skilled Trades Occupations	7.2%	6.8%	-0.4%
Caring Leisure and Other Service Occupations	6.9%	5.8%	-1.0%
Sales and Customer Service Occupations	5.6%	4.8%	-0.8%
Process Plant and Machine Operatives	2.8%	2.4%	-0.4%
Elementary Occupations	8.2%	7.5%	-0.7%
Not stated	8.9%	8.1%	-0.8%
Total	100%	100.0%	

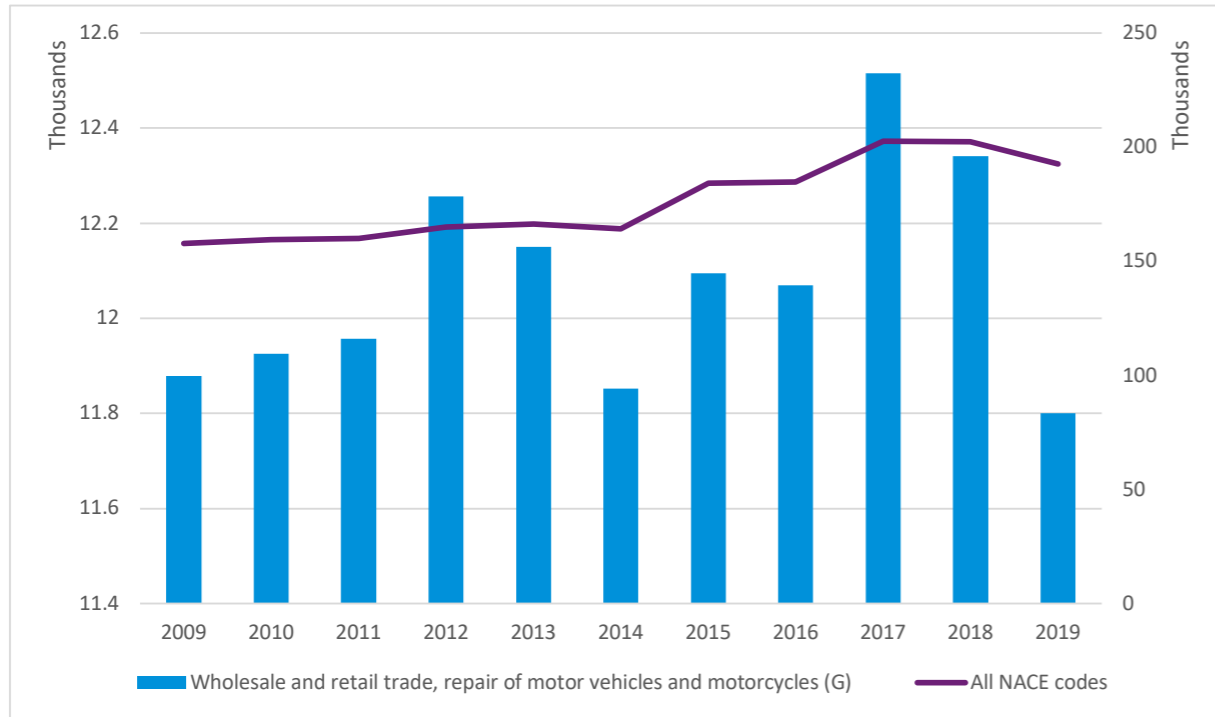
A2.2.8 4 Persons at work by occupation

The table above further charts the occupation types identified in the study area, with the largest cohort comprising those who work in 'Professional Occupations' (28.6%). 'Associate Professional and Technical Occupations' (16.2%) comprise the second largest cohort, which points to the higher professional and educated attainment of Dún Laoghaire's population compared to the national averages that shows only 17.3% as 'Professional Occupations' and 10.9% as 'Associate Professional and Technical Occupations'. 'Professional Occupations' and

'Associate Professional and Technical Occupations' were the only occupations to increase in the intercensal period.

Of the people 'At work' within the study area, the analysis highlights that 'Professional Occupations', and 'Associate Professional and Technical Occupations' are the most predominant socioeconomic groups. Over 20% of the population were classed as 'Employers and Managers'.

A2.2.9 Industry of Employment

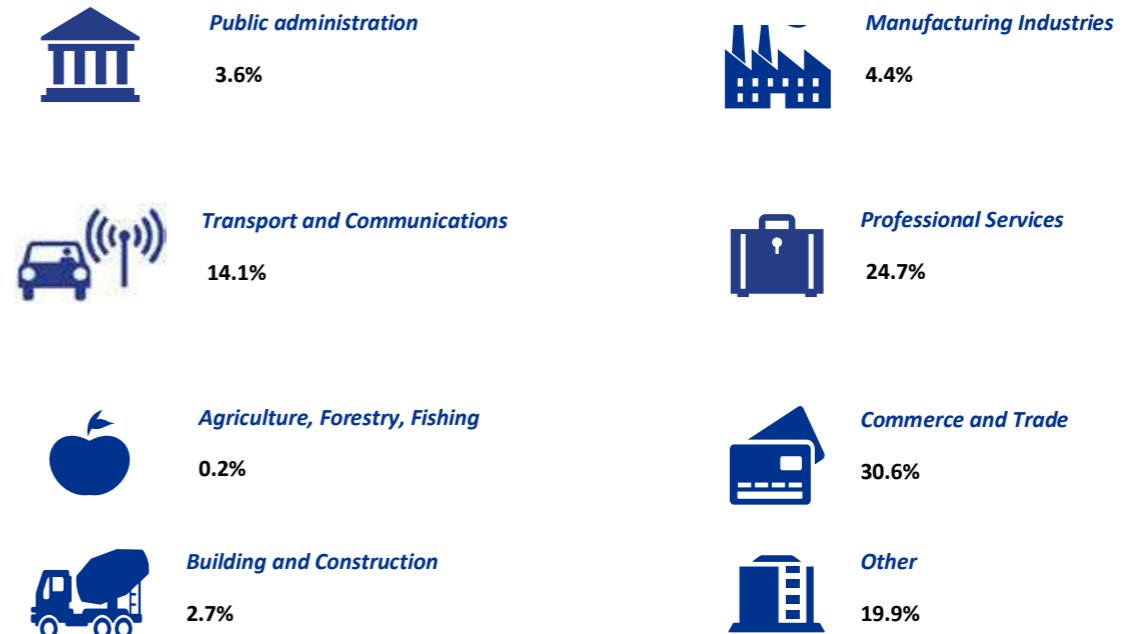


A2.2.9 1 Dublin Business Demography 2009 - 2019

To measure the strength of enterprise activity within a region the CSO's Business Demography data measures the numbers of enterprises which have been registered and have ceased trading on an annual basis. This data also measures the rate of survival in new enterprises with associated employment figures. 2017 saw an increase of 3.69% in enterprise growth however, the preceding year since has saw a decreasing trend within Dublin County, falling to 11,800 in 2019 a decrease of -4.38% from 2018.

This decreasing trend is similar to the national trend with decrease of -4.93% from 2018.

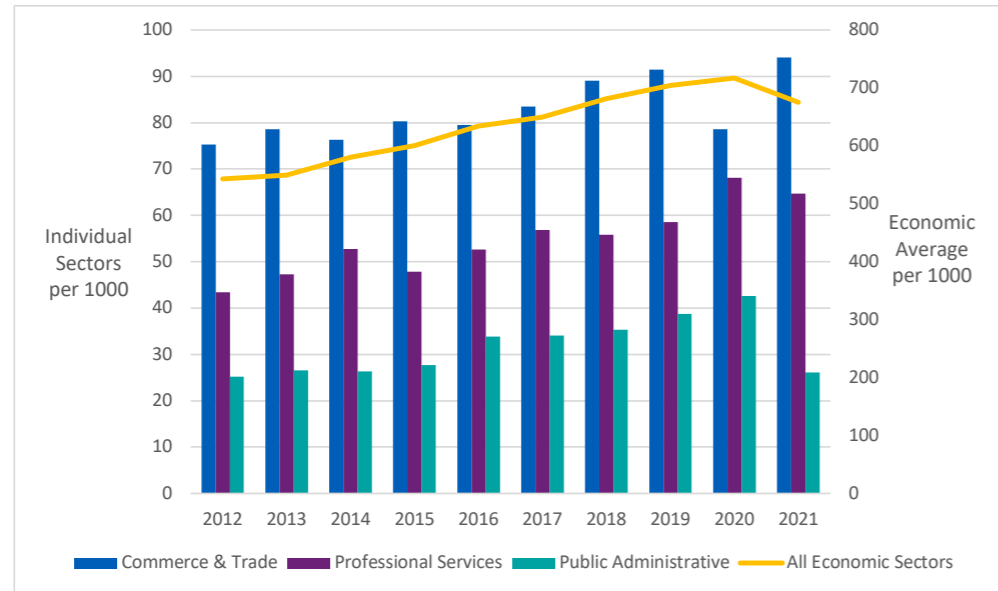
It is therefore worth noting the types of industries in which residents of Dún Laoghaire are employed within. The following graphics illustrate the percentage of the resident working population by industry in the study area (as recorded in Census 2016).



A2.2.9 2 Persons at work by industry

In Dún Laoghaire the largest industry of employment recorded for residents is 'Commerce and trade' which represents 30.6% of the working population, followed by 'Professional services' at (24.7%). Once again, these figures would indicate a higher skilled, higher educated, and potentially

higher earning workforce in Dún Laoghaire. Clearly, the town is an attractive location for professionals to reside and if this is to continue to be the case further residential development is required to satisfy the needs of this professional cohort.



A2.2.9 3 Persons aged 15+ Employed in Dublin (CSO, Labour Force Survey, 2021)

If Regional Employment levels are observed there has been a steady increase in employment since 2012. The main industries in the study area of Commerce & Trade, Professional Services and Public Administrative Services have shown an increase of 25% over the 9-year period. Retail in the Dublin Region seen a decrease of over 14% between the first quarter of 2019 and 2020 however, this industry increased over 2020 with a 19% increase recorded in quarter 1 over 2021.

Professional Services increased over 2019 by 16% but later decreased over 2020 by 5%. Public Administration employment increased by 10% over 2019, this industry decreased by over 38% in 2020. Across all Economic Sectors there was an increase of 2% in 2019 while 2020 saw an average decrease of 6%.

Dún Laoghaire possesses a highly educated population who are predominantly employed in commerce and trade and professional services.

There has been a steady increase in employment since 2012, with the main

industries in the study area of Commerce & Trade, Professional Services and Public Administrative Services have shown an increase of 25% over the 9-year period. Retail in the Dublin Region seen a decrease of over 14% between the first quarter of 2019 and 2020 however, this industry increased over 2020 with a 19% increase recorded in quarter 1 over 2021.

Professional Services increased over 2019 by 16% but later decreased over 2020 by 5%. Public Administration employment increased by 10% over 2019, this industry decreased by over 38% in 2020. Across all Economic Sectors there was an increase of 2% in 2019 while 2020 saw an average decrease of 6%.

A2.2.10 Means of Travel to Work and Education

The following table provides an overview of the means of travel to a place of work or education for people in the study area.

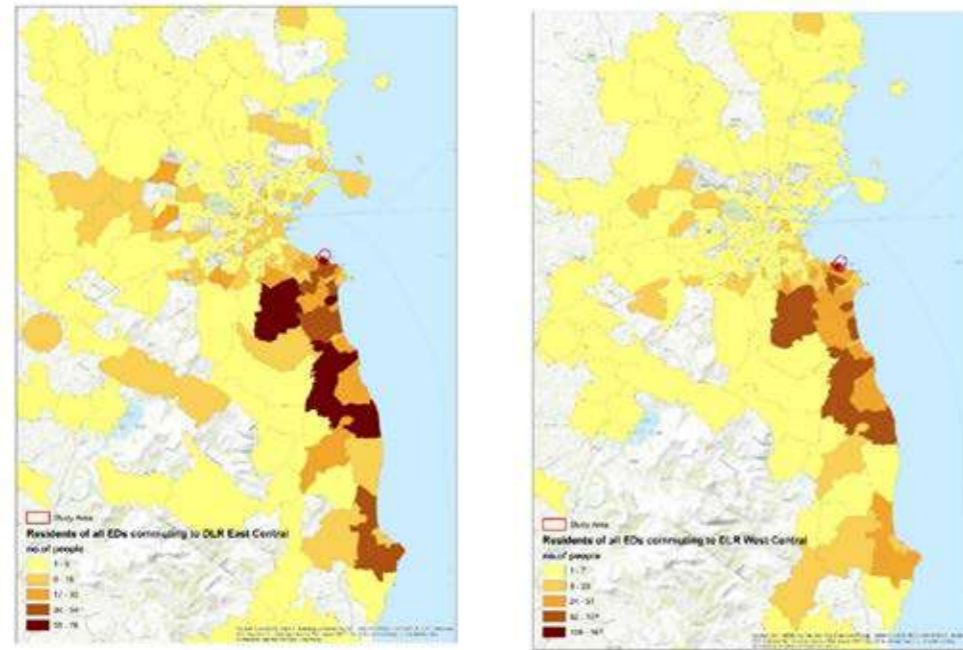
Means of Travel [CSO]	2011	2016
	Work/Educ	Work/Educ
On foot	21%	17%
Bicycle	4%	6%
Bus minibus or coach	12%	11%
Train DART or LUAS	21%	23%
Motorcycle or scooter	0.7%	0.7%
Car driver	25%	23%
Car passenger	8%	8%
Van	1%	1%
Other (incl. lorry)	3%	0%
Work mainly at or from home	0.0%	4%
Not stated	5%	5%

A2.2.10 1 Means of travel to places of work and education

As seen in Table 2.2.10-1 above, 31% of commuters to work/education used a car (Driver and passenger), while 34% used public transport (Train, Dart or LUAS and Bus, Minibus or Coach). This transport information can be used to assess the reliance on private and public modes of transport in the study area. The Means of Travel in the study area did not change significantly between 2011 and 2016, the

bicycle and 2% people less are traveling by car.

The CSO's Place of Work, School or College - Census of Anonymised Records (POWSCAR) dataset indicates the movement of people to and from the study area, for the reasons of travelling to respective places of work or education. The following figures present the number of

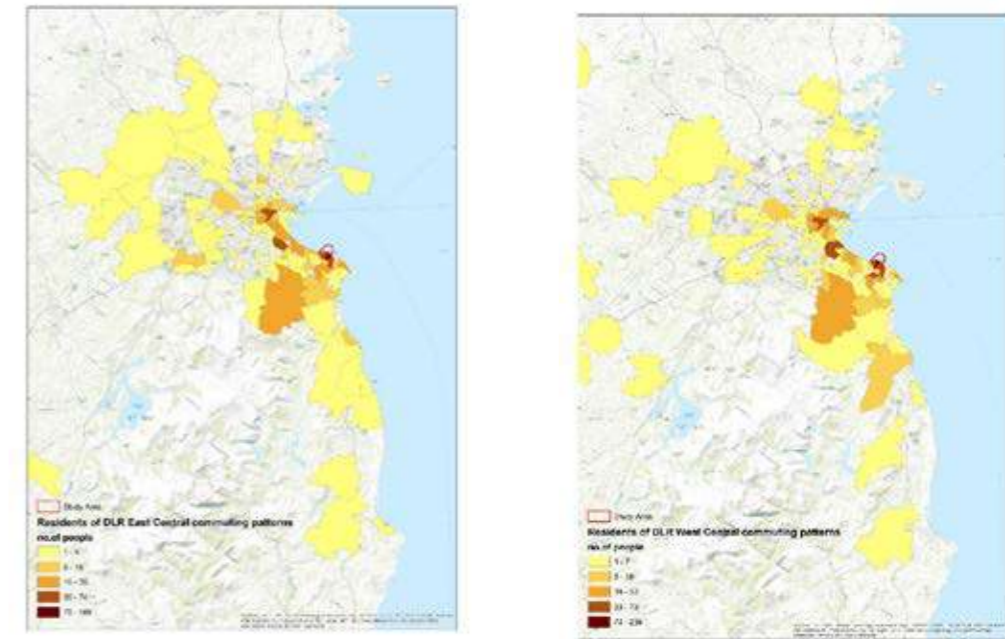


A2.2.10 2/3 People commuting to DLR East Central & West Central (Census 2016 POWSCAR)

As seen in Figures A2.2.10-2 & 3, most of the people travelling to both Electoral Divisions within the study area for work and education come from the Electoral Divisions immediately surrounding Dún Laoghaire, with quite a strong prevalence to the South of Dublin City and further down the Coastline to Wicklow town. The Dún Laoghaire West Central Electoral Division contained a range of 55 – 78 commuters from Electoral Divisions such as Glencullen to the west of the study area and the Electoral Divisions surrounding Greystones of Kilmacanoge and Kilcoole in Wicklow.

For the Dún Laoghaire West Central Electoral Division a larger range of commuters were recorded with 52 – 107 presenting a similar prevalent layout of Southern Electoral Division with the addition of several smaller Divisions such as Shankill-Shanganagh and Killiney South.

The outflow of persons travelling from the study area for education were highest in Electoral Divisions to the North and closer into the City Centre. The 75 – 186 range presented Electoral Division such as Clonskeagh-Belfield, South Dock and Mansion House. While the Dún Laoghaire West Central Electoral Division also accounted for the Pembroke East Electoral Division.



A2.2.10 3/4 People commuting from DLR East and West Central to other Electoral Divisions (2016 POWSCAR)

From this travel analysis it can be seen that Dún Laoghaire attracts more commuters who are situated further South to the study area while Commuters who leave the study area are travelling North closer to the City Centre.

A2.2.11 Connectivity

Access to internet and computer hardware information was used to access the ability of households who access the internet and make use of online information and services. Interestingly the number of households with a personal computer decreased by 5.6% while the number of households with access to the internet in the form of broadband increased by 8.6%.

Households with a personal computer [CSO]			
	2011	2016	% Change
Yes	1,843	1,740	-5.6%
No	486	499	2.7%
Not Stated	112	68	-39.3%

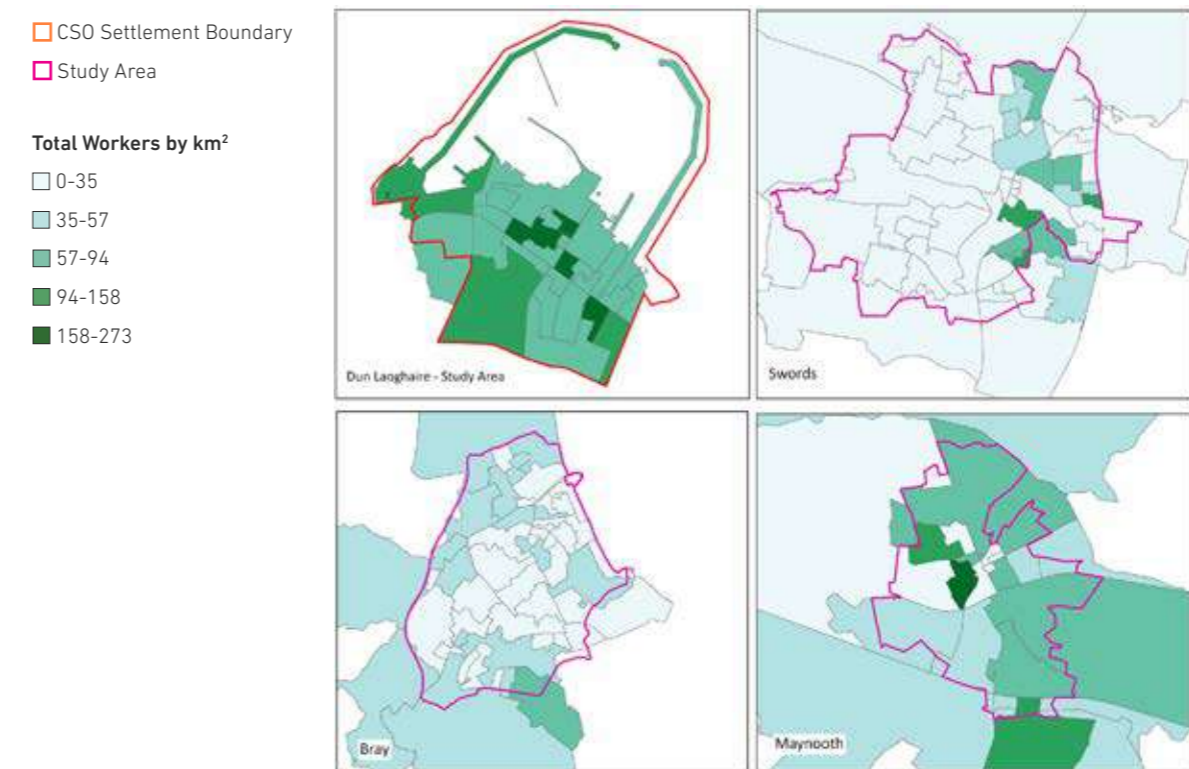
A2.2.11 1 Households with a personal computer

Households with access to the internet [CSO]			
	2011	2016	% Change
Broadband	1,659	1,801	8.6%
Other	177	98	-44.6%
No Access	493	354	-28.2%
Not Stated	112	54	-51.8%

A2.2.11 2 Households with a personal computer

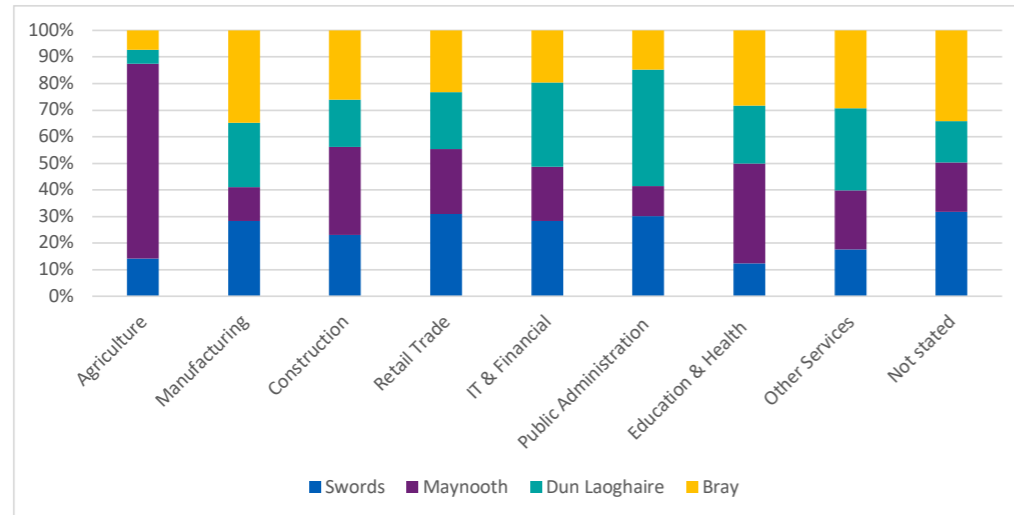
A2.2.12 Workplace Zones

It is useful to consider where the Dún Laoghaire town study area ranks in comparison to other major town centres within the Dublin Metropolitan Area. KPMG Future Analytics have considered three key towns of Swords, Bray and Maynooth in comparison to Dún Laoghaire town centre as illustrated in A2.2.12 2. Dún Laoghaire town does not have a CSO town boundary, in order to measure the impact of each area comparatively, each settlement boundary has been normalised against the workplace zones, this calculates the number of Workers per kilometre squared. The relative concentrations of employment can be identified in the below figure



A2.2.12 1 Comparison of Dún Laoghaire Town study area, Swords, Bray and Maynooth town centres (CSO, 2016)

When normalised by the study area size Dún Laoghaire contains a high concentration of inward commuters for work. Of the 35 workplace zones situated within the study area boundary the range of Workers per Kilometres Squared ranged from 57 to 273 workers. When compared to larger Settlement boundaries such as Bray or Swords this range was a lot less with 0 – 57 workers per Kilometres Squared.



A2.2.12 2 Comparison of town centres by industry of employment (CSO 2016)

Within the Swords Settlement Boundary 32% of workers recorded working in Retail industries, another 24% of commuters recorded working in IT and Financial Services. Due to Maynooth containing a number of Education centres, 33% of workers recorded travelling for industries in Education and Health.

The largest industry recorded by workers in the study area Workplace zones were IT and Financial services (27%), Retail Trade (22%), Education and Health (19%)

It can be observed from Figure A2.2.12 2, that Bray has a largest percentage of people working in Manufacturing from all 4 towns, with 11% of workers working with the settlement in this industry.

A2.2.13 Socio Economic Key Insights

- 451 amount of large scale residential units have been granted since 2016 in the study area, if all granted units were built and filled this would equal approximately an additional 1,024 persons.
- Dún Laoghaire possesses a highly educated population who are predominantly employed in commerce and trade and professional services.
- One person households, despite a decrease of 14.8% from 2011 to 2016 remains the largest household group at 33.8%. The decrease in the number of households within the study area by 5.5% resulted in the average household size increasing from 2.13 to 2.27 between 2011 - 2016.
- The number of vacant dwellings within the study area decreased by 33% between 2011 - 2016 from 489 to 328 dwellings.
- Between 2010 - 2020, residential property prices in Dún Laoghaire increased by 3.36%, and by a further 1.75% in the first 6 months of 2021.
- Dún Laoghaire has three third level education institutes within the town and its surrounding area as well several primary schools and five secondary schools.
- Between 2011 - 2016, the study area's population was getting more educated. The study area has a very good level of education attainment and is substantially higher than the state averages when it comes to NFQ7 and above.
- The number of unemployed people in the study area decreased by 42.5% between 2011-2016 account for 5.2% of the working aged population as of 2016.
- Despite a decline of 9.5%, students are third highest in the age group classification behind retirees and people at work. Students are generally those people who have just finished secondary school and are, therefore, quite a youthful cohort. Retaining this cohort, once their studies have been completed, could be essential for the local economy and important if Dún Laoghaire is to continue to grow and become a young, vibrant location.
- Of the people 'At work' within the study area, the analysis highlights that 'Professional Occupations', and 'Associate Professional and Technical Occupations' are the most predominant socioeconomic groups. Over 20% of the population were classed as 'Employers and Managers'.
- In Dún Laoghaire the largest industry of employment recorded for residents is 'Commerce and trade' which represents 30.6% of the working population, followed by 'Professional services' at (24.7%). Once again, these figures would indicate a higher skilled, higher educated, and potentially higher earning workforce in Dún Laoghaire.
- 31% of commuters to work/education used a car (Driver and passenger), while 34% used public transport (Train, Dart or LUAS and Bus, Minibus or Coach).
- From our travel analysis it can be seen that Dún Laoghaire attracts more commuters who are situated further South to the study area while Commuters who leave the study area are travelling North into the City Centre.

- When normalised by the study area size Dún Laoghaire contains a high concentration of inward commuters for work. Of the 35 workplace zones situated within the study area boundary the range of Workers per Kilometres Squared ranged from 57 to 273 workers.
- The number of households with a personal computer decreased by 5.6% while the number of households with access to the internet in the form of broadband increased by 8.6%.
- The largest industry recorded by workers in the study area Workplace zones were IT and Financial services (27%), Retail Trade (22%), Education and Health (19%)
- There has been a steady increase in employment since 2012. The main industries in the study area of Commerce & Trade, Professional Services and Public Administrative Services have shown an increase of 25% over the 9-year period. Retail in the Dublin Region seen a decrease of over 14% between the first quarter of 2019 and 2020 however, this industry increased over 2020 with a 19% increase recorded in quarter 1 over 2021.
- Professional Services increased over 2019 by 16% but later decreased over 2020 by 5%. Public Administration employment increased by 10% over 2019, this industry decreased by over 38% in 2020. Across all Economic Sectors there was an increase of 2% in 2019 while 2020 saw an average decrease of 6%.

- **Georges Street Lower between Marine Road/Patrick Street and Library Road** from Downey Property (24-25 Georges St Lower) to Home Focus (73) on the southside, and from EBS (78-78A) to Pinoy Sari Sari Store (112-113) on the northside.
- **Patrick Street** from Ritz Café (3) to Corrs Uniforms (26) on the eastside, and from Aru Joinery (91) to The Architects (111) the westside.

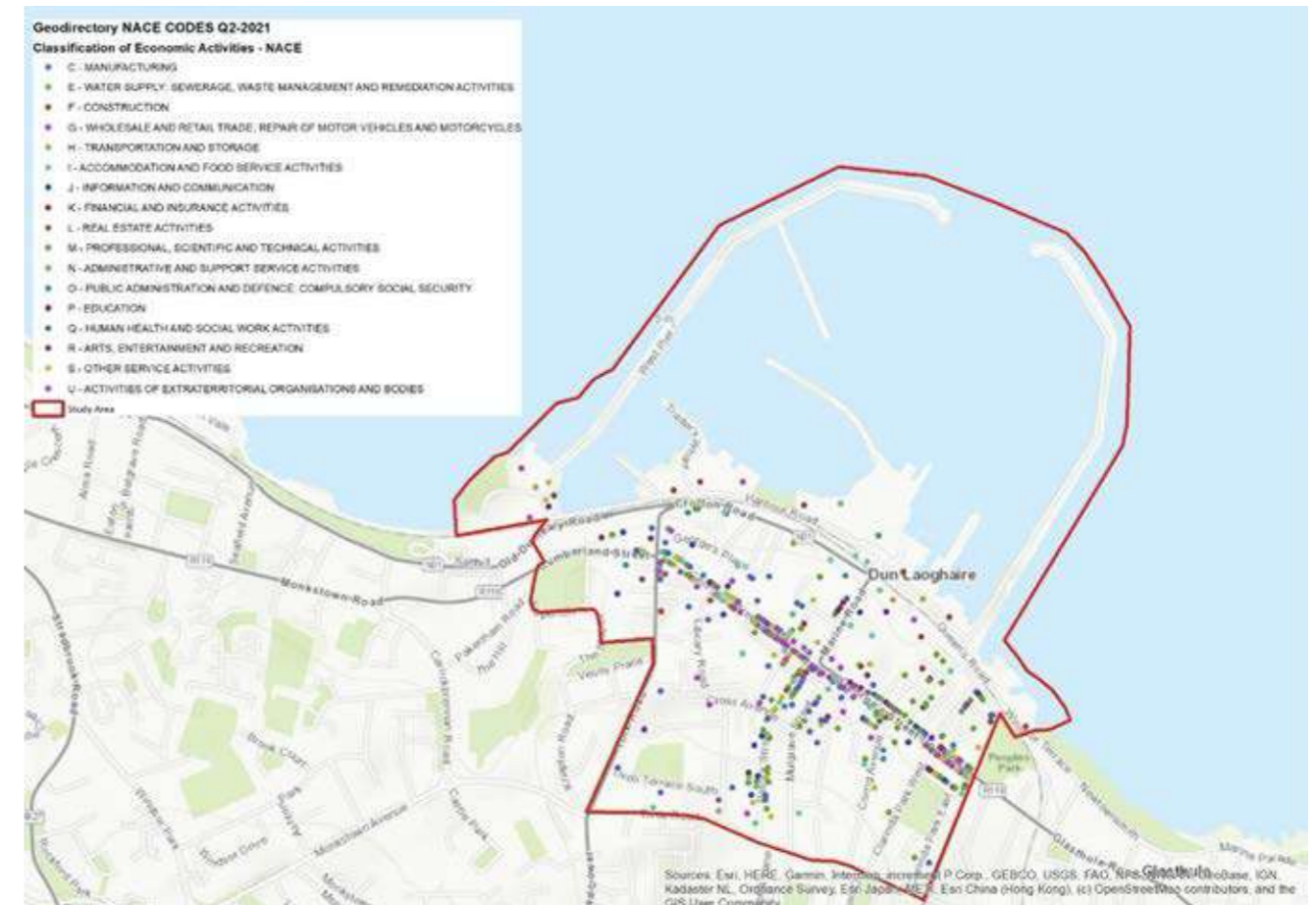
Observations show that there are a wide variety of café's and food shops, although a limited number of high-quality restaurants. There are six charity shops with vintage clothing which would not be excessive for this area or as a proportion of retail outlets. There are a limited number of comparative clothing outlets, particularly ladies' fashion.

A2.2.14 Retail Analysis

Analysis of the distribution of businesses within the study area enables patterns to be distinguished. KPMG Future Analytics have mapped economic activity by NACE code²² in Figures A2.2.14 1 & 2, which focuses in on the town core. This illustrates concentrations of retail activity three clusters.

There are four identifiable clusters:

- **Georges Street Upper from the People's Park to the junction with Clarinda Park West/Mellifont Avenue** which includes The New Corner Shop (46A) and Haines (65) on the southside, and Proprint (66a) to McLoughlin's (73) on the northside.
- **George's Street Upper from the junction with Corrig Avenue to Marine Road** from Facet Jewellers (1 George's Street Upper) to Sherry Fitzgerald (35 Georges St Upper (including Anglesea Buildings) on the southside, and the now closed Ulster Bank on the corner of DLSC to AIB (104 George's Street Upper) on the northside.



A2.2.14 1 Distribution of businesses within the study area (Source KPMG FA analysis of NACE code data)

22 - The acronym NACE (Nomenclature of Economic Activities) designates the integrated classification system for products and economic activities.



A2.2.14 2 Geodirectory Property Additions 2016 - Q2 2021

Historically, Dún Laoghaire was one of the key retail locations within the county. The main street has been the historical centre of retail and commerce within the town and is one of longest main streets in Ireland at approximately 1.06 kilometres in length. Recent developments such as the Pavilion Theatre and the Metals Project at the Junction of Marine Road and Queen’s Road offer new retail services, such as food and beverage facilities, clothing, homewares and marine supplies.

The town is also home to two shopping centres. Dún Laoghaire Shopping Centre (DLSC) on Marine Road, which opened in 1976, was one of the first shopping centres in the country and first multi-storey covered shopping centre. The centre contains 40 retailers, 250 car parking spaces and is the headquarters of Ireland’s largest supermarket operator, Tesco Ireland, which employs over 450 staff within the centre. In recent years, the DLSC has experienced higher vacancy rates, which have been further exacerbated by public health restrictions as a result of the ongoing Covid-19 pandemic. However, a large area of the shopping centre, Level 3, is currently being transformed into a new HSE primary care centre including dental, physiotherapy, mental health, speech and language therapy consulting spaces, which will invigorate this previously underutilised space. The other shopping centre within the town, Bloomfield’s Shopping Centre, opened in 1997 and is located along George’s Street Lower. This centre contains 21 retailers and over 300 car parking spaces.

Other retail within the town includes several restaurants and cafés along Marine Road and Crofton Road, such as a Nando’s, Starbucks, Milano and Hartley’s Dún Laoghaire, Teddy’s Ice Cream and O’Brien’s Off-Licence. Retail provision within the town has suffered from vacancy in the last decade, however vacancy has now considerably reduced.

A2.2.15 Planning Conversion

Granted change of use planning applications within the study area since 2016 to present were analysed to examine the trends of commercial units being converted to residential units.

The main findings are that a total of seven planning applications had been granted to change the use of commercial units to solely residential use resulting in the loss of approx. 4,500m² of commercial floor space and the provision of 41 new residential units. A total of seven change of use applications to mixed use resulted in loss of approx. 1,170m² of commercial floor space and provided 18 new residential units. The loss of 5,670m² of commercial space equates to an indicative figure of approximately 473 jobs based upon an average of 12m² needed per employee. One application resulted in the loss of 480m² of retail floor space and the provision of 14 residential units. Two change of use applications from retail to mixed use was also identified resulting the loss of approx. 230m² of retail floor space and the addition of four new residential units. Two change of use applications resulted in the loss of approx. 700m² of factory floorspace while providing 28 new residential units and approx. 307m² of new commercial floorspace.

Residential units did not have any granted applications to have their use changed to commercial or mixed use within the study area and the same was found for mixed use units.

For the purpose of this analysis, applications for the demolition of a building with a certain use and construction of a new building with a new use was included in these figures i.e. Demolition of an existing factory and construction of a mixed use development was counted as changing the use. ‘Living over the shop’ exempted developments (as recorded by Dún Laoghaire Rathdown County Council) were also analysed. A total of 20 residential units ‘Living over the shop’ were recorded as exempted development with a mix of one or two bed units.

A2.2.16 Vacancy Analysis

The level of vacancy within a study area is a factor of the ‘health’ of a defined place. Given that on-site surveys were limited due to Covid-19, KPMG-FA examined the optimum means of assessing vacancy which was determined to be derived from Dun Laoghaire Rathdown Commercial Rates Information.

This indicates that there are 862 commercial units within the study area and 103 of those units are vacant. This gives a 11.94% commercial vacancy rate for the Dún Laoghaire Town study area. This rate is similar to the national average vacancy rate of 13.6% and Dublin of 12.2% calculated by the Geodirectory.

An optimum vacancy rate could be envisaged to be approximately 5%. Activating vacant commercial premises within the study area would make the town more desirable, town centre property more valuable and vibrant and should be an objective of the Council to encourage this or promote meanwhile uses. While vacancy in the town study area is lower than many other towns, there are key buildings that are vacant which increase the perception of vacancy.

Recent press coverage has indicated vacancy rates of almost 30% for some towns and with others around 25%²³, which would suggest the vacancy rate for the study area is not relatively high in comparison to other towns. This is reflected in The GeoView Commercial Property Report for Q2 2021²⁴ which includes the following commercial vacancy data:

- 13.6% national rate
- 12.7% rate in Leinster excluding Dublin
- 12.2% rate in County Dublin
- 7.0% in Greystones, the lowest of 35 towns in Leinster
- 27.7% in Edenderry, the highest of 35 towns in Leinster
- 29.5% for Ballybofey, Co. Longford, the highest in Ireland
- An increase in commercial vacancy rates was recorded in 18 counties in Q2 2021 when compared to the same period in Q2 2020
- A decrease in commercial vacancy rates was recorded in 6 counties in Q2 2021 when compared to the same period in Q2 2020
- Of the top five counties with the highest commercial vacancy rates, four of these were located in Connacht, with one-in-five commercial properties vacant in Sligo (20%), the highest in the country.
- Apart from Kildare (14.2%), all counties in the Greater Dublin Area registered commercial vacancy rates lower than the national average, with Meath (10.3%) recording the lowest rate.

An optimum vacancy rate, as experienced by other north European towns could be envisaged to be approximately 5%. An objective should be to activate vacant commercial premises within the study area. This would make the town more desirable, town centre property more valuable and more vibrant.

²³ <https://www.businesspost.ie/Planning/surveys-reveal-vacancy-rates-of-up-to-25-in-many-towns-dc05c666>

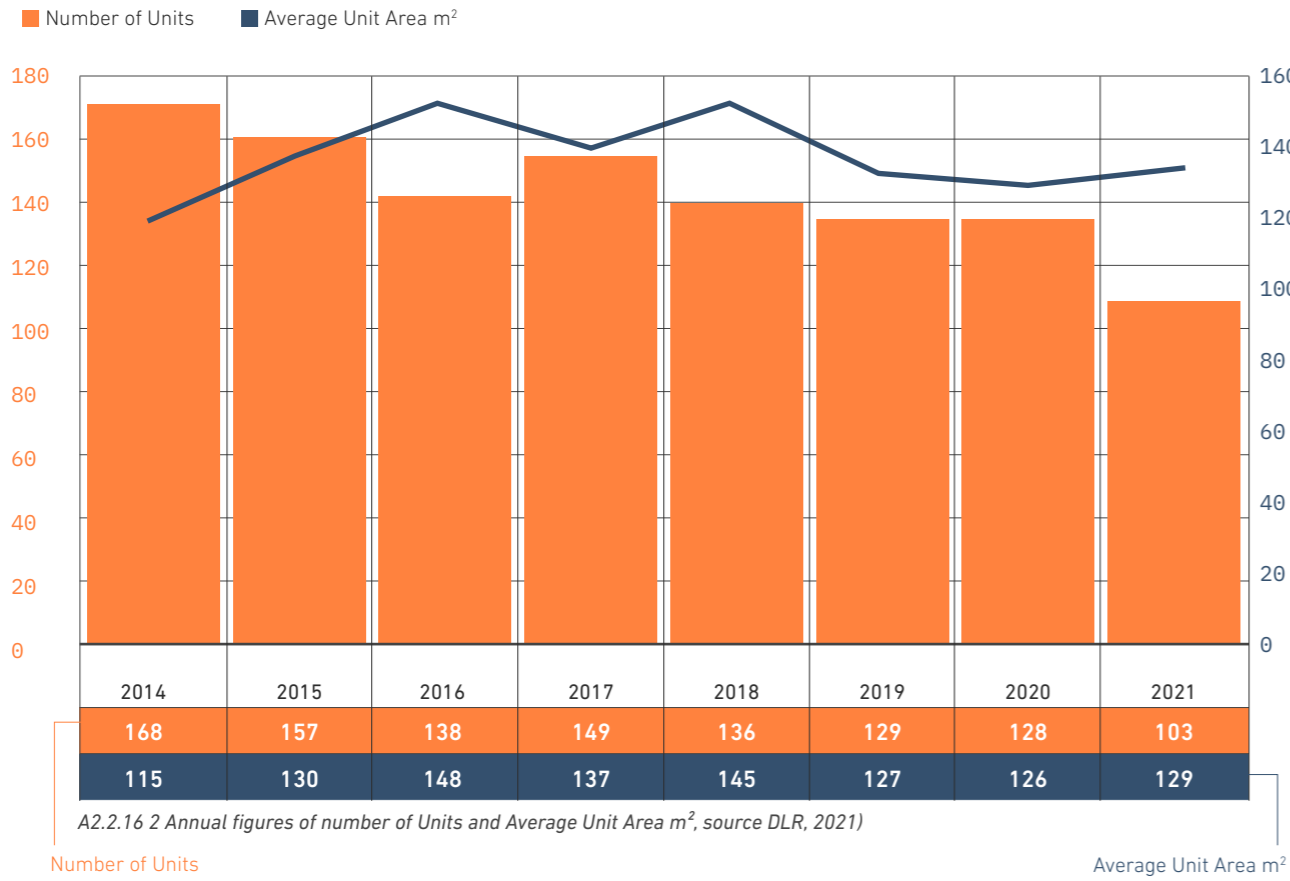
²⁴ <https://www.geodirectory.ie/knowledge-centre/reports-blogs/geoview-commercial-property-report-q4-2020>



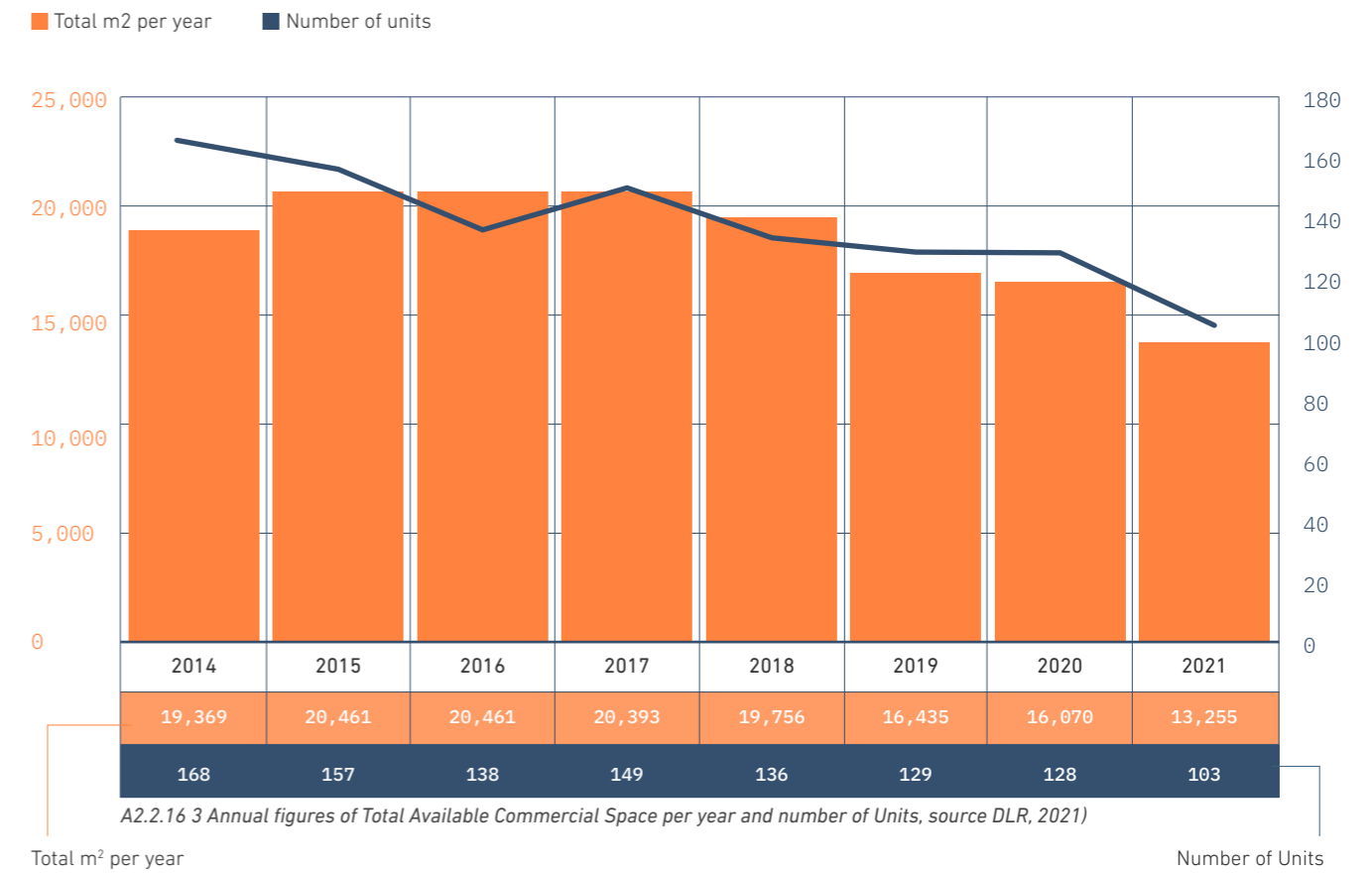
A2.2.16 1 Vacant addresses within the study area (Source KPMG FA analysis of GeoDirectory data for Q2 2021)

To accurately calculate the annual vacancy of units within the study area, the annual Rates Evaluation Register was used to calculate the total Employable Space alongside the Average commercial Unit size. Rates are a charge on the occupation of commercial and industrial property and are a major contributor to the funding of and delivery of services by local authorities each year²⁵. Rates which are payable by an individual ratepayer are a product of the Net Annual Value (NAV). This value is set by the National Valuation Office and the Annual Rates on Valuation (ARV), set by the particular local authority. It must be noted within this research that only the NAV value was analysed.

²⁵ Reval 2019 – Preliminary Analysis of Outcome



Since 2014 there has been a decreasing trend within the data, with 128 vacant units recorded in 2020. The average area of units seen a steady increase from 118.1 m² recorded in 2012 to 145 m² in 2018, this trend did decrease to 126 m² in 2020. However, with a decrease of 25 properties from 2020 to 2021, there has been an increase in the average unit area to 129m².



This decrease in average area indicates a small increase in the property size becoming vacant, this is reinforced in the minimum area available in 2020 recorded at 4m², which increased to 7.78 m² in 2021. The average NAV value has also been decreasing within the study area for vacant properties, with 41,470 recorded in 2018, this decreased by -24.50% in 2021 to 31,311. With the decrease in unit numbers and Average Unit Area, the total annual commercial space has decreased by 35% since 2017, recording 13,255m² available in 2021.

An opposite trend in the average unit area was discovered in the Industrial Uses category with 26 units never submitting a vacant memo recorded with an average unit area of 310m² while 13 units were recorded submitting a vacant memo had an average unit area of 386m². The total commercial space being occupied by this category is 8071m² while the 13 vacant units recorded a total available space of 5019m², this implies the small number of vacant units are of considerable size which could be re-occupied or redeveloped.

Address	Uses
114 (Rear) Georges Street Lower, Dun Laoghaire, Co. Dublin	OFFICE, STORE
11A Haddington Terrace, Dun Laoghaire, Co Dublin	WORKSHOP
15A Georges Street Upper (Rear), Dun Laoghaire, Co Dublin	ABATTOIR
21 Monkstown Crescent, Monkstown, Co. Dublin	WORKSHOP
21/24 Rear Patrick Street, Dun Laoghaire, Co. Dublin	WORKSHOP
2A Tivoli Terrace East, Dun Laoghaire, Co. Dublin	WAREHOUSE
64A Convent Road, Dun Laoghaire, Co Dublin	WORKSHOP
68A Georges Street Lower (Rear), Dun Laoghaire, Co Dublin	STORE
8 York Road, Dun Laoghaire, Co Dublin A96 YX25	WORKSHOP
9 Cumberland Street, Rear, Dun Laoghaire, Co Dublin	WORKSHOP
Georges Place, 7-9 Clarence Street, Dun Laoghaire, Co. Dublin	WORKSHOP
Ice House Traders Wharf Coal Harbour, Crofton Road, Dun Laoghaire, Co Dublin	STORE
Unit 3b West Pier, Jetty /Harbour, Dun Laoghaire Co Dublin	YARD

A2.2.16 4 Addresses of Vacant Industrial Units

A total of 448 occupied units were recorded within the study, these properties have never been vacant. The average area for these properties is 247m² and an average NAV value of 945 per m², the largest occupied area within the dataset recorded 8,709 m². The total commercial space which these units occupy is 110,892.53 m². As A2.2.16 5 states the most common unit category within these units are Retail (Shops) with 216 units.

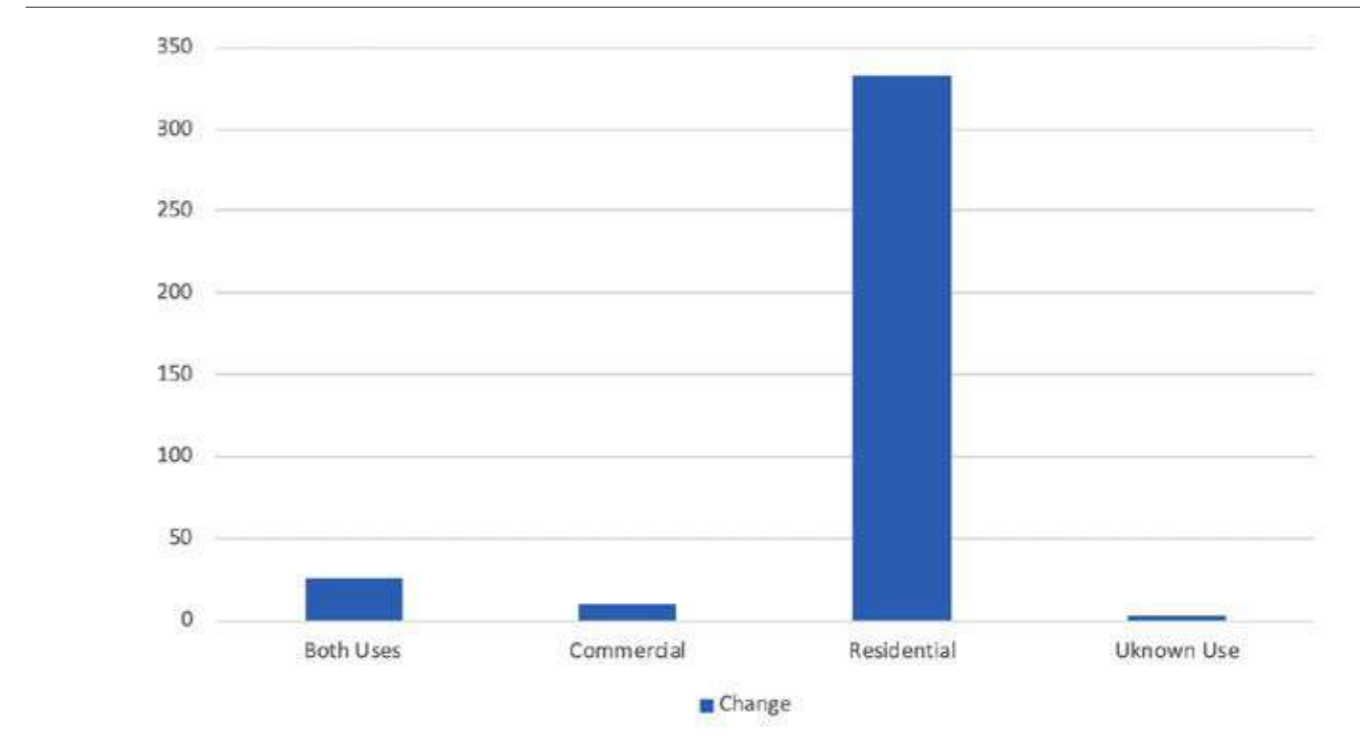
KPMG – FA also compared the level of vacancy in 2014 to the levels in 2019 by category by looking at the amount of properties that had a vacant memo registered for it in those years. For the purpose of this particular analysis, the years 2020 and 2021 were omitted as Government restrictions may have required certain businesses to close temporarily, giving the perception they were vacant which may have affected the output of the data.

Again, the largest category within both of these years was Retail (Shops) category, in 2014 102 properties had a vacant memo registered, this number fell to 93 in 2019.

The Office category also had significant changes, in 2014 the number of properties with a vacant memo registered was 56 and in 2019 it reduced by 30 units to 26.

A2.2.17 Changes in Property Use

The Geodirectory database for quarter 2 of 2021 recorded an additional 300 addresses to the residential category. The commercial category seen a small increase of 10 additional addresses accounting for 814 units within the Housing stock. The category of Both Uses saw the second largest increase with 25 additional units to the database indicating an increase in residential property as well as units that contain both residential and commercial uses, while units that are used solely for Commercial purposes has increased slightly due to the larger demand for residential space.

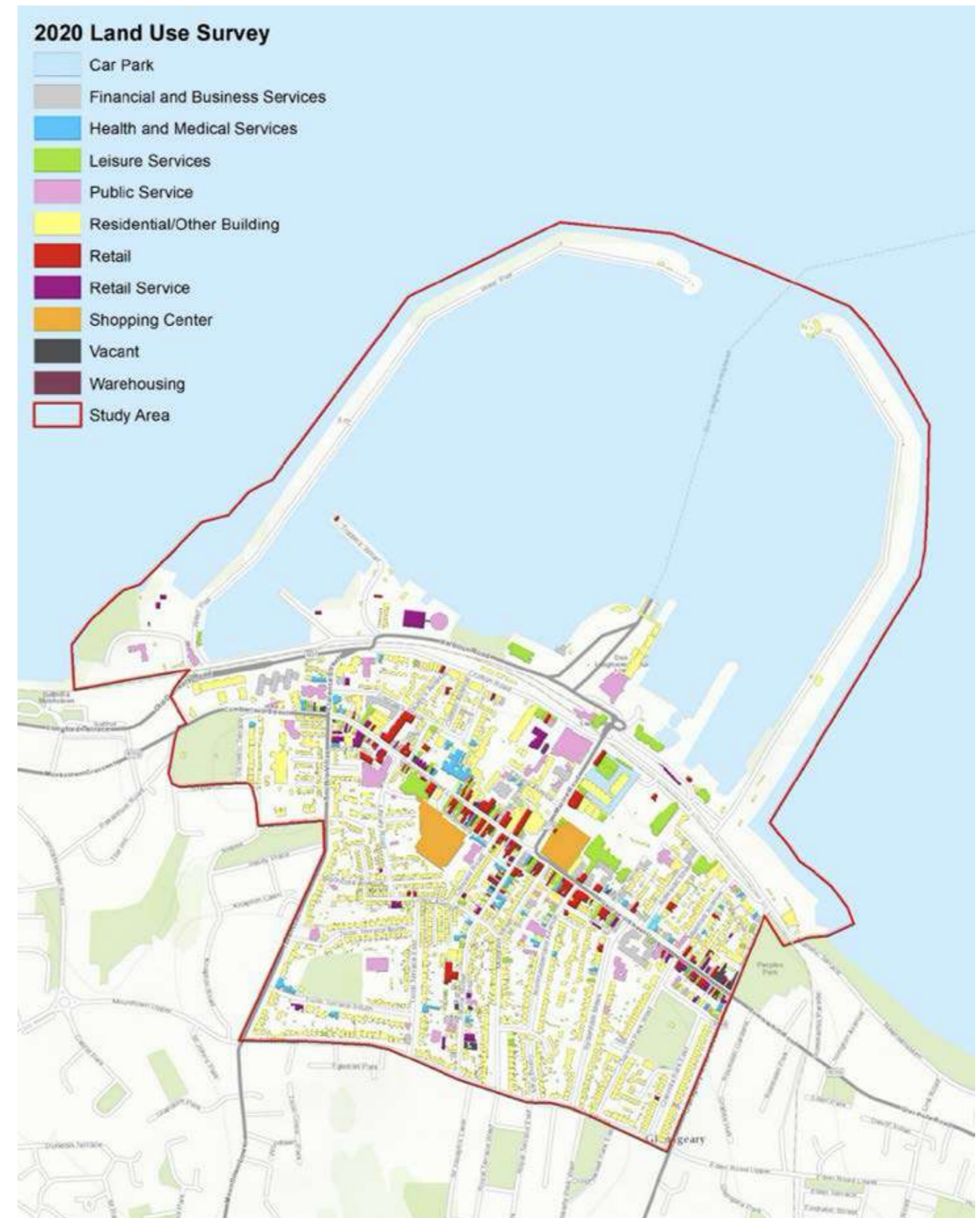


A2.2.17 1 Geodirectory Changes in Property Use 2016 - 2021

A2.2.18 Land Use Survey

KPMG Future Analytics have undertaken a detailed analysis of land use within the study area, which was conducted in March 2020 and builds on the latest Geodirectory land use and availability data using KPMG FA's Arc-GIS 'Collector' technology. KPMG Future Analytics have prepared an GIS database with each property geo-located and status recorded²⁶. The detailed survey for the whole study area is provided in Figure 2.2.18 1 overleaf.

Land uses have been grouped by NACE code,²⁷ with the floorspace for each grouping used for the map outlined in Table A2.1.18 2. The majority use class is 'Residential' (54.9%) followed by 'Public Service' (8.6%), 'Leisure Services' (8.1%), and 'Financial and Business Services' (7%). We note that 'Retail' comprises just 6.5% of the overall floorspace of the study area. 1% of the total floorspace sq. m in the study area is classed as vacant.



A2.2.18 1 Study Area Land Use Survey (Source: KPMG Future Analytics 2020)

26 - <https://geofac.maps.arcgis.com/home/webmap/viewer.html?webmap=2696a9a13f0d43d883171c8cc79f5019>

27 - The acronym NACE (Nomenclature of Economic Activities) designates the integrated classification system for products and economic activities.

Since 2016, a total of 7 change of use applications been granted to uses change the use to fully residential use, and seven applications have changed commercial units to mixed use resulting in the loss of 5,670m² of commercial floor space and the addition of 59 new residential units. A further 20 residential units have been recorded under the 'Living over the shop' planning exemption illustrating a trend towards mixed use developments in the study area.

Type	Floorspace sq. m	%
Car Park	5,101	1.7
Financial and Business Services	20,547	7
Health and Medical Services	9,694	3.3
Leisure Services	24,046	8.1
Public Service	25,445	8.6
Residential	162,066	54.9
Retail	19,205	6.5
Retail Service	10,302	3.5
Shopping Centre	15,840	5.4
Vacant	2,826	1
Warehousing	251	0.01
Total	295,323	

A2.1.18 2 Floorspace by NACE code grouping for the study area

A2.2.19 Retail Analysis Key Insights

- There are a wide variety of café's and food shops, although a limited number of high-quality restaurants. There are six charity shops with vintage clothing which would be excessive for this area or as a proportion of retail outlets. There are a limited number of comparative clothing outlets, particularly ladies' fashion.
- Four identifiable clusters of businesses were identified and observations from these shows that there are a wide variety of café and food shops but a limited number of high-quality restaurants. The relatively young and professional population would present a level of demand for high-quality restaurants which would increase vibrancy and Dún Laoghaire's evening economy.
- An objective should be to activate vacant commercial premises within the study area. This would make the town more desirable, town centre property more valuable and more vibrant.
- The Dún Laoghaire is home to a wide range of retail units, and two shopping centres, the Dún Laoghaire Shopping Centre (DLSC) and Bloomfield's shopping centre. Retail provision within the town has suffered from vacancy in the last decade, particularly along George's street. The increasing trend of change of use applications from commercial to residential could play a role in regenerating these vacant properties.

- Since 2016, a total of 7 change of use applications been granted to uses change the use to fully residential use, and seven applications have changed commercial units to mixed use resulting in the loss of 5,670m² of commercial floor space and the addition of 59 new residential units. A further 20 residential units have been recorded under the 'Living over the shop' planning exemption illustrating a trend towards mixed use developments in the study area.
- A total of 862 commercial units were recorded within the study area and 103 units are vacant. This gives a 11.94% commercial vacancy rate for the Dún Laoghaire Town study area. This rate is similar to the national average vacancy rate of 13.6% and Dublin of 12.2% calculated by the Geodirectory.
- On a yearly average the number of vacant units has been decreasing since 2014 but the sizes of vacant properties has increased in 2021.
- With the decrease in unit numbers and Average Unit Area, the total annual commercial space has decreased by 35% since 2017, recording 13,255m² available in 2021. A total of 448 occupied units were recorded within the study, these properties have never been vacant. The average area for these properties is 247m² and an average NAV value of 945 per m², the largest occupied area within the dataset recorded 8,709 m². The total commercial space which these units occupy is 110,892.53 m².
- An opposite trend in the average unit area was discovered in the Industrial Uses category with 26 units never submitting a vacant memo recorded with an average unit area of 310m² while 13 units were recorded submitting a vacant memo had an average unit area of 386m². The total commercial space being occupied by this category is 8071m²m while the 13 vacant units recorded a total available space of 5019m², this implies the small number of vacant units are of considerable size which could be re-occupied or redeveloped.
- The Geodirectory database recorded an additional 300 addresses to the residential category.

A2.2.20 Tourism and Events

Dún Laoghaire-Rathdown benefits from an impressive range of tourism amenities and attractions, centred around Dún Laoghaire, which originally developed as a tourist destination for holidaymakers during the early 19th Century. Dún Laoghaire has the benefit of the harbour which attracts millions of visitors per year for its maritime activities. The Irish National Sailing and Powerboat School is located within Dún Laoghaire and offers sailing course at all levels. The Dublin Bay Cruises and Dublin Boat Tour depart from Dún Laoghaire and offer trips to the City Centre, Howth, and around Dalkey Island. The harbour also has activities such as Paddle boarding, Kayaking, Kitesurfing and scuba diving.

Dún Laoghaire town centre is home attractions such as the pavilion theatre which hosts theatre, cinema, comedy, literature, opera, dance, workshops, festivals, and local arts. It has been described as 'the cultural heartbeat for Dún Laoghaire town'. The striking cultural centre called the dlr Lexlcon is also located within the town, this includes a public library as well as municipal gallery, studio theatre, and exhibition spaces. The National Maritime Museum is another busy tourist attraction within the town, this museum displays maritime history, exploration, technology, wildlife, and art inspired by the sea.

Dún Laoghaire town has two main hotels, Haddington House which is a restored townhouse that has views of the harbour with an award-winning restaurant and The Royal Marine Hotel which is a historic 4-star hotel with views across Dublin Bay.

The Harbour, while providing a key centre for recreation within the town and county, also acts as an important asset for the hosting of a range of events throughout the year and has been host to several internationally renowned landmark events in recent years. Events such as the Red Bull Cliff Diving Series, Volvo Ocean Race, The Beatyard, The Ball, Iron Man 70.3, Red Bull Flugtag among a host of others have all taken place within the Harbour.

Though the Harbour is the town's main tourist and recreational destination, alternative physical amenities are also within hands-reach of the town centre. There are several public parks within the town. Newtownsmith, located along Scotsman's Bay, is Dún Laoghaire's largest public park at over 2 ha. People's Park is the town's most renowned public park, hosting the People's Park Market every Sunday from 10am – 4pm and several other events throughout the years. The Victorian park is just under 1.5 ha in size. Several other public parks and open spaces can be found throughout the town, such as the West Pier or 'Gut', Clarinda Park, Moran Park and Vesey Park.

A2.2.21 Community and Business Groups

Dún Laoghaire has an engaged and active community and business network. The resident community is represented by Dún Laoghaire Central Residents Association, made up of a group of residents from resident associations across the Dún Laoghaire area. In 2019 the Dún Laoghaire Town Team was formed to build on collaboration as part of the 2019 entry to the National Enterprise Town Awards (NETA) which was successful in December 2019. The Dún Laoghaire Tidy Towns group was reformed in January 2020 and have over 80 volunteer members. They focus on regular clean ups and looking after several green areas.

The business community are active as part of the Dún Laoghaire Business Association (DLBA) which comprises volunteers from town businesses. The DLBA has organised and run the Christmas Festival, which included the erection of the Christmas lights, Parade from the People's park, Santa's arrival and switch-on by the Cathaoirleach and Fireworks Display at the Harbour Plaza. The business community is further supported the @DigitalDúnLaoghaire business network which aims to create a community of innovation driven enterprises, identify available office space in the town, run @DigitalDunLaoghaire meetups and briefings, and overseeing the #LoveDunLaoghaire campaign²⁸.

Dún Laoghaire-Rathdown Local Enterprise Office (LEO)

Dún Laoghaire-Rathdown Local Enterprise Office (LEO) is located within Dún Laoghaire Town and serves the entire of Dún Laoghaire-Rathdown County by offering advice to entrepreneurs on starting and growing a small business and providing high quality business training and financial support. The Dún Laoghaire-Rathdown LEO aims to be 'a first stop shop to provide support and services to start, grow and develop micro business' in Dún Laoghaire-Rathdown county.

Dún Laoghaire-Rathdown LEO offers a range of financial support to qualifying small businesses, with up to ten employees that are based in Dún Laoghaire-Rathdown. These financial supports aid new and existing small business and help them reach their full potential. There is a set criterion for financial assistance from The Dun Laoghaire-Rathdown LEO.

28 - <https://www.digitaldunlaoghaire.ie/about>

Some of these criteria are the person applying must be an EU citizen, the business must have less than ten employees and cannot be a business that deals in professional services, consultancy, retail, or distribution. The full list of eligible and ineligible projects can be found on the LEO website [1]. An overview of some of the grants and supports offered is shown Table 2.2.21 1 overleaf.

Grant / Support	Description	Grant payable
Shop Front Improvement Scheme	Supports the improvement of the overall appearance of commercial properties that front onto public streets within Dún Laoghaire-Rathdown.	50% (ex-VAT) of improvement costs subject to a maximum of €5,000 per premises.
Vacant Commercial Premises Scheme	Aimed at encouraging new businesses to occupy commercial premises, that have been vacant for more than 6 months. Applicable to subject premises with rates valuation of no more than €60,000	Sliding scale refund of 75% (€7,500 max), 50% (€5,000 max) and 25% (€2,500 max) of rates paid in first 3 years of occupation.
Outdoor Dining Scheme (Available until 30 th September 2021)	Aimed at assisting the food and hospitality businesses to increase their dining and seating capacity in short-term.	75% funding of up to €4,000 towards the cost of outdoor furniture and equipment purchased since April 1 st 2020.
Feasibility Grant	Designed to assist with researching market demand for a product or service and examining its sustainability.	50% of the investment or €15,000, whichever is lesser
Priming (Start-up) Grant	Available to micro enterprises, within 18 months of start-up.	May cover portion of qualifying Salary costs and/or 50% of qualifying Non-salary costs (ex VAT), subject to maximum contribution of €80,000
Business Expansion Grant	Designed to assist the business in its growth phase after 18-month start-up period. (Funding is issued on a part grant, part repayable (0% interest) basis.)	May cover portion of qualifying Salary costs and/or 50% of qualifying Non-salary costs (ex VAT), subject to maximum contribution of €80,000
Export Marketing Grant (Technical Assistance for Micro Exporters)	Part funding of the costs for investigating and researching export markets.	50% of eligible costs (net of VAT) to a max of €2,500.
Trading Online Voucher Scheme	Assists small businesses to trade online. Eligible businesses can apply for a voucher to invest in developing their eCommerce capability.	Voucher of up to €2,500
Microfinance Ireland (MFI) Covid-19 Business Loan	Available to businesses with a 15% or more reduction in turnover or profit and have trouble getting Bank Finance.	Business Loans from €5,000 to €25,000

Innovation Vouchers	Open to small and medium-sized 'Ltd' Irish companies to assist exploring business opportunities or problem with a registered knowledge provider.	Vouchers worth €5,000
Agile Innovation Fund	Enterprise Ireland fund open to LEO clients, supports product, process or service development projects.	50% in support for projects mentioned with a total cost of up to €300,000 with fast track approval.

A2.2.21 1 A Selection of Dún Laoghaire-Rathdown LEO grants / Supports

Note: The table above provides a brief overview of the grants and supports available, many of these have eligibility requirements. Full details can be found on the Dún Laoghaire LEO website.

Enterprise Ireland

Enterprise Ireland is a government organisation that is responsible for the development and growth of Irish enterprise in world markets. Enterprise Ireland works with Irish enterprises, helping them start, grow, innovate, and win export sales in the global market. As a result, Enterprise Ireland supports secure employment, regional development, and sustainable economic growth within Ireland. Enterprise Ireland provides a range of supports to business, tailored to suit the businesses stage of development and its specific funding needs. Enterprise Ireland offer supports to companies at four different stages of development, these are: Have a Start-up Idea, High Potential Start-up (HPSU) funding, Established SME Funding (> 10 Employees) and Large Company Funding (>250 Employees).



APPENDIX 3: POLICY ANALYSIS DETAIL



Appendix 3: Policy Analysis Detail

A3.1 Policy Analysis

National Planning Framework and the National Development Plan 2018-2027

National Policy strongly encourages and facilitates economic growth across the country, the two main policy documents encouraging this are the National Planning Framework (NPF) and the National Development Plan (NDP). Both the NPF and the NDP contain specific policy's in the form of National Policy Objectives (NPO's), National Strategic Outcomes (NSO's) and Strategic Investment Priorities (SIP's). Relevant National Strategic Outcomes (NSO's) under the NPF include 'Compact Growth', 'A Strong Economy, supported by Enterprise, Innovation and Skills', 'Enhanced Amenity and Heritage' and 'Transition to a Low Carbon and Climate Resilient Society'.

The NPF includes relevant policies that aim to make Ireland's cities, towns and villages more liveable places. One of the ways of achieving this is through the growth of the economy and it is an objective of the NPF under NPO 5 to:

'Develop cities and towns of sufficient scale and quality to compete internationally and to be drivers of national and regional growth, investment and prosperity.' (NPF, p56)

The NPF encourages development in brownfield sites that can result in the creation of more jobs and activity within existing cities, towns and villages rather than focusing development on 'greenfield' sites. NPO 11 encourages this type of development that generates more jobs within existing cities, towns and villages.

'In meeting urban development requirements, there will be a presumption in favour of development that can encourage more people and generate more jobs and activity within existing cities, towns and villages, subject to development meeting appropriate planning standards and achieving targeted growth.' (NPF, p65)

The NDP supports the implementation of the NPF by setting out the investment priorities for the state. The NDP supports growth and helps Local Authorities attract investment through the 'New Regeneration and Development Fund Initiative'. Through a total investment of €116 billion, this level of capital spending aims to ensure ongoing cross-sectoral regional development and public investment. Exchequer funding accounts for 79% of total investment with the remainder coming from non-Exchequer State-backed enterprises and bodies. Through this fund, the Urban Regeneration and Development Fund of €2 billion is available which can enable a greater proportion of commercial developments to be delivered within the existing built-up footprint of cities and towns that can be hugely beneficial to Dún Laoghaire's growth. A total of €550 million of these funds are made available up until the period ending 2022. €9.4 billion is being made available for funding of enterprise, innovation and skills initiatives and €21.8 billion funding for low-carbon and climate-resilience.

Regional Spatial and Economic Plan (RSES) 2019-2031

The RSES is a high-level plan that seeks to support the implementation of the NPF by providing a strategic planning and economic framework for the region's sustainable growth and development. It echoes the NPF in emphasising sustainable development patterns and seeks to focus growth within the footprint of existing urban areas and in key regional growth settlements. The RSES for the Eastern and Midlands Regional Assembly (EMRA) identifies regional assets, opportunities and pressures and provides appropriate responses in the form of Regional Policy Objectives (RPO). The RSES recognises the potential of Key Towns and urban centres, like Dún Laoghaire, to promote sustainable and compact growth, efficient use of both new and existing infrastructure services, revitalise a sense of place and heritage within large towns and integration of natural and green spaces into urban areas.

The MASP identifies strategic locations within the metropolitan area where it supports employment generation, Dún Laoghaire is not identified as one of these locations which could constrain development in the area by attracting it to other locations. However, the MASP recognises the importance of seaports such as Dún Laoghaire as key regional economic drivers.

The RSES identifies the retail sector as a significant employer and economic contributor to the region and it sets out the Retail Hierarchy for the Region which identifies Dún Laoghaire as a level 2 Major Town Centre & County (Principal) Town Centre. RPO 6.10 states that the EMRA will 'Support the preparation of Retail Strategy / Strategies' allowing Dún Laoghaire to promote and highlight its strong retail in the town centre, this supported with RPO 6.14;

'EMRA will support the use of targeted financial incentives to re-establish the dominant role of town centres provided for in planning policy to encourage a greater take up of town centre development opportunities for retail, residential, commercial, and leisure uses.'

Financial incentives focused on town centre renewal will support Dún Laoghaire's growth and will assist in boosting the retail sector after the impacts of Covid-19.

Dún Laoghaire-Rathdown County Development Plan 2016-2022

Dún Laoghaire's local policy comes in the form of the Dún Laoghaire-Rathdown County Development Plan 2016 – 2022. The Development Plan seeks to develop and improve, in a sustainable manner, the social, economic, environmental, and cultural assets of Dún Laoghaire-Rathdown. Mandatory requirements include the inclusion of objectives for the zoning of land, the provision of infrastructure, the conservation and protection of the environment, and the integration of planning and sustainable development with the social, community and cultural requirements of the area and its population. Chapter 3 of this Study sets out the Enterprise and Employment Strategy and has a strategic vision to;

'support and facilitate the economic development of the County across a range of sectors while acknowledging the growing importance of the knowledge economy and the historical problem of unemployment blackspots within the County'

Chapter 3.2.6 outlines specific objectives for Dún Laoghaire-Rathdown and lists four areas that additional objectives have been allocated too, these areas are Stillorgan, Blackrock, Nutgrove and Cornelscourt District Centres. This could limit growth in Dún Laoghaire by pulling investment towards these highlighted areas. It could be beneficial to include Dún Laoghaire in this specific objective as way of attracting investment to the area.

Urban Framework Plan for Dún Laoghaire

The County Development Plan for Dún Laoghaire-Rathdown includes an Urban Framework Plan for Dún Laoghaire, which sets out a clear vision for Dún Laoghaire town by identifying key sites in the town and aims to assist and guide development that contributes to the physical regeneration of Dún Laoghaire town. Three themes underpin the UFP: Reconnecting the town centre to the waterfront; creating vitality and; strengthening links with the adjoining area. Within these themes, specific actions and sites are identified to help support these themes within Dún Laoghaire. Strategic maps and drawings for each of these themes and their related sites and actions/ideas. The UFP also identifies four key quarters within the town to catalyse the transformation and enhancement of these sites: The *Town Centre Quarter*; the *Park End Quarter*, the *Seafront Quarter* and the *Old Town Quarter*.

Draft County Development Plan 2022-2028 – Community and Climate First

The Dún Laoghaire-Rathdown Draft County Development Plan 2022-2028 was issued for online public display in January 2021 and was be available for public display until April 2021. It is during this period that members of the public can view and submit their views on this Draft Plan before the publication of the full Development Plan following the expiry of the current Development Plan in 2022. Within the Draft Plan, specific regard is given to the future development of the county's communities and its actions towards climate change and biodiversity loss. Specific national regional and local objectives are outlined to support and underpin these future developments, such as: energy efficiency, climate resilience, compact and connected growth, inclusivity, liveability and vibrant economic activity.

By giving precedence to sustainable and resilience policy objectives, these objectives can be positively leveraged to promote the attractiveness, liveability and vibrancy of the social, environmental and economic framework of the county and aide in transforming the county into a sustainable and resilient region. As Dún Laoghaire is the county town, its role in promoting sustainability and resilience in future development is paramount. In this way, the opportunity for the town to act as a champion of positive change is greater than ever and can see the town take the lead for other towns in the county to follow.

As per the previous County Development Plan 2016-2022, the Draft Plan contains within it an Interim Urban Framework Plan for Dún Laoghaire. The Plan is intended to set out a clear and coherent vision to assist and guide the ongoing development and regeneration of Dún Laoghaire Town. It also contains the progress made on objectives and sites from the UFP within the CDP 2016-2022.

The Draft County Development also refers to the Local Enterprise Development Plan²⁹, the objectives of which are reflected in this strategy.

29 - <https://www.localenterprise.ie/DLR/Enterprise-Development/Local-Enterprise-Office-DLR-2021-2024-Development-Plan-Framework/DLR-Economic-and-Enterprise-Plan-2021-2024.pdf>

Dún Laoghaire-Rathdown Local Economic and Community Plan 2016-2022

The Dún Laoghaire-Rathdown LECP 2016-2022 is based on a coordinated and collaborative approach to planning and service delivery, and the promotion of economic and community development, through the identification of priority issues within the county and the establishment of dedicated objectives and actions that will deliver these over the lifetime of the LECP. The LECP also contains a socio-economic profile of the county as a whole and subsequent SWOT analysis for the county. The LECP is structured around a strategic vision which is transposed into a hierarchy of high-level goals, objectives and actions. The vision, goals, objectives and actions are underpinned by the concepts of the smart county - attractive public realm, vibrant economic activity, inclusive civic engagement, skills, innovation and enterprise. Specific regard is also given to the natural environment of the county and the importance of protecting and enhancing the development of our natural amenity and green economy in a sustainable manner.

Within both the economic and community objectives of the LECP, Dún Laoghaire town has specific actions outlined to enable the positive economic and social development of the town and its surrounding areas. This includes actions surrounding developing a dynamic marine/maritime economic cluster within the Harbour area, creation of an arts, culture and heritage centre within the town, supporting a growing enterprise and innovation community within the town through provision of incubation spaces and appropriate funding streams along with wider community-based actions such as support for child services, age friendly strategies, drug and addiction task forces, improved open public spaces and inclusive physical environments. The blending of these actions helps galvanize the vision of the LECP and provide the framework to realise the enhancement of both the economy of the county and its diverse and rich communities.

DLR Local Economic and Enterprise Development Plan 2021 - 2024

The Development Plan (LEDP) 2021 - 2024 is a non-statutory plan setting out the objectives and actions that will promote and support local economic and enterprise development in Dún Laoghaire Rathdown County over a four year period and is a precursor to the next LECP, the process for developing same commencing in 2022.

The latest LEPD provides an innovative and ambitious program of grants and programs to support the local economy including businesses of all sizes and in all sectors to improve their competitiveness, help them scale and increase the number of people they employ. The Plan aims to support a vibrant business community and delivery key place making and infrastructure projects to attract and retain businesses and employees in the region. Of particular interest is the focus of this plan in increasing Management Capability in the region companies through the Full Program which is one of many novel and innovative programs being delivered.

The Plan contains a vision/mission and overarching objectives that are focused on three main services, The Local Enterprise Office, The Economic Unit and the Tourism Office.

Dún Laoghaire-Rathdown Tourism Strategy and Marketing Plan 2017-2022

Dún Laoghaire-Rathdown Tourism Strategy and Marketing Plan 2017-2022 is a 5-year strategic plan which sets out the case for tourism within the county, objectives to help achieve the full potential of tourism within the county and indicative projects to promote and attract opportunities. The Strategy contains a vision statement for the county. This vision statement outlines the clear importance of both our coastal amenity and towns in creating a robust framework to help in developing the tourism sector within the county:

"A highly attractive and accessible tourism destination, steeped in culture and maritime heritage, combining a breath-taking coast, inviting villages and towns, and Dublin Mountains adventures, delivering memorable and distinct experiences for visitors."

heritage, combining a breath-taking coast, inviting villages and towns, and Dublin Mountains adventures, delivering memorable and distinct experiences for visitors."

This coastal and maritime capital is inherently ingrained within the identity of Dún Laoghaire. The Strategy outlines 15 key locations within the county as potential locations for tourism development. Of these 15 sites, four are located within Dún Laoghaire, which attract and estimated 1.5 million visits per year combined. This represents over 45% of all visits to these key locations per year. The Strategy also highlights the qualitative strengths of tourism in the county are heavily associated with culture, heritage, and the coast. Water-based activities within the county represented 9% of all activities of holidaymakers, with 52% of holidaymakers citing history and culture as the reason for their visit and 52% outlining their wish to visit again. The value of tourism within the county is estimated to be €300 million per annum. These findings showcase the huge potential for tourism within the county to be a key economic driver within the county and within its towns. As Dún Laoghaire has an abundance of both culture, heritage and coastline, the potential to utilise tourism as a mechanism for both town centre and waterfront transformation in the future is both vast and ever-growing.

Within the objectives of the Strategy, emphasis on both the welcome and activities for visitors is extensive. Given that Dún Laoghaire is a key arrival point for visitors travelling to the county via DART, the importance of maintaining an attractive public realm cannot be overstated. As Dún Laoghaire is also the county town of DLR, many of the objectives and projects outlined in the Strategy are to be implemented within the town. These

include projects such as the Dún Laoghaire Baths project, new 'Blue lines', improved wayfinding systems and other visitor and enterprise projects.

Local Policy strongly encourages economic activity and growth within the County, although some policies promote areas outside of Dún Laoghaire for investment, the Urban Framework Plan for Dún Laoghaire combined with the objectives set in the County Development Plan attract investment to Dún Laoghaire.

Comparable policy initiatives that have stimulated economic growth

Galway City: Galway City has grown exponentially over the years and this has come as a result of an ambitious vision set by Galway City. This vision for Galway City is based on the concepts of smart, sustainable and inclusive growth from Europe 2020, and has been driven through the development of a consistent policy framework by Galway City Council. Although there are differences between Galway City and Dún Laoghaire Rathdown, the same approach can be adopted and tailored to fit the needs of Dún Laoghaire Rathdown. Galway City Council developed various strategies and plans to guide the vision for the city, an example of some of the plans are Galway City Council Corporate Plan 2015, Galway City Statement of Strategy – Economic Sustainability 2015-2021 and the Climate Change Strategy for Galway City. These plans produced by Galway City Council are consistent with the Galway City Development Plan and when combined with other locally produced documents, demonstrate a challenging, though attainable vision. The alignment of policy with EU objectives with a focus on sustainable goals and development to set a vision for the City is one of the drivers behind the economic growth of the city.

A3.2 Trends Analysis

PESTEL Analysis

In order to gain a comprehensive understanding of the wider context and key influencing forces shaping the future growth and development of towns like Dún Laoghaire, a PESTEL analysis has been undertaken. This PESTEL analysis highlights key internal and external factors under six thematic areas – **Political, Economic, Social, Technological, Environmental and Legal**. This analysis highlights both the challenges and opportunities which may shape the future of Dún Laoghaire's spatial and economic development. The subsequent SWOT (**Strengths, Weaknesses Opportunities and Threats**) analysis in section 6.0, is informed by the PESTEL analysis and further analyses these influencing factors by classifying them as either strengths, constraints, opportunities or threats to Dún Laoghaire specifically. The PESTEL complements the SWOT analysis by providing a wider 'broad-brush' view of influencing factors which may be missed by more localised SWOT analysis alone.

Political

- As of 2016, over 2.9 million people in Ireland live in urban areas, an increase of 4.8% since 2011 – which implies that majority jobs are concentrated around city regions.
- The Urban Regeneration and Development Fund (URDF) was introduced in 2018 through the National Development Plan toward the National Planning Framework's compact growth strategy through regeneration of Ireland's five cities, key regional drivers and large towns. The fund makes available €2 billion in funding up to 2027.
- The Government, in 2015, announced a Regional Competitive Fund to support significant regional initiatives. The Fund was launched over two calls in 2017 & 2018 and approved approximately €60 million in funding, with an additional €43 million in funding awarded in 2019.
- While the popularity of remote working in Ireland was increasing prior to the Covid-19 pandemic, the transition from office-based working to remote working was almost overnight.
- In January 2021, the Department of Enterprise, Trade and Employment released the National Remote Work Strategy. The strategy aims to ensure that remote working is a permanent feature in the Irish workplace in a way that increases participation in the labour market, attracts and retains talent and enables balanced regional development.

Economic

- In April 2021, national unemployment levels were at 22.4%. The significant fluctuations in the unemployment rate in 2020 and 2021 mainly reflect the impact that the tightening and relaxing of public health restrictions has had on businesses and enterprise.
- Enterprise Ireland's 'End of Year Employment Results 2020' report shows 16,496 new jobs created by Enterprise Ireland supported companies in 2020. Due to circumstances arising from the Covid-19 pandemic and subsequent economic recession, there was a net loss of 872 jobs in 2020, a stark drop in job creation from 2019.
- 2020 saw an additional €124 million in funding towards the Sustaining Enterprise Fund and under a range of Covid-19 business support schemes.
- In 2018, the estimated turnover of the marine economy was €6.2 billion, providing employment to 34,132 FTEs
- Looking forward to 2021, the impact of Brexit on consumer prices is likely through food and other products that are imported from the UK.
- The shift to flexible remote working conditions has mainly impacted IT, Financial and professional service-based employment sectors, though retailers and other consumer good services operators have experienced both the challenges and opportunities associated with recent economic trends.
- Consumer behaviour indicates changes from comparative retail towards experiential retail, catalysed by both the Covid-19 pandemic and shifts towards online comparative shopping.

Social

- Recent decades of population growth have not occurred evenly throughout the country.
- Dublin had one of the highest county growth rates recorded between 1966 and 2016, with a population growth rate of almost 70%. Population change in Dún Laoghaire-Rathdown was exponential between 1966 and 2016, increasing from 51,772 to 217,274. This is a percentage increase of almost 420%.
- As the CSO Census 2016 results show, the average age of Ireland's population stood at 37.4 years in April 2016, up by 1.3 years since 2011. Dún Laoghaire-Rathdown, at an average age of 39 years, is the oldest county in the Region and state.

Technological

- Undoubtedly the most significant global change we have witnessed in recent decades has been the increasing digitalisation of economic activity. This has implications on both the traditional composition of town centre streets and the dynamics of working arrangements.
- Ireland possesses one of the largest proportion of consumers who purchase online via “cross-border” websites.
- 2020 also saw this digitalisation increase through the several nationwide and countywide lockdowns, in which retail sectors not deemed essential were forced to close intermittently throughout 2020, which further led to increased digitalised and ‘online’ economic activities among both suppliers and consumers.
- In 2019, the CSO reported that 91% of all households have internet access.
- The Government have committed to the National Broadband Plan, an initiative to deliver high speed broadband services to all premises in Ireland. Up to 146,000km of fibre will be deployed as part of the State intervention, delivering high speed broadband to over 1.1 million people, in approximately 540,000 premises across the country.
- With the continued delivery of the National Broadband Plan and the increasing popularity of both remote working and co-working conditions, the increasing digital connectivity of our people, services and industries have and will continue to have monumental impacts on all human activity and interaction.

Environmental

- The Government has published its Climate Action Plan 2019 which sets out proposals to reduce Ireland’s greenhouse gas emissions. This plan stays consistent within all the four local authorities in Dublin. The Climate Action Plan and National Biodiversity Action Plan are currently being revised and will set out national targets out to 2030.
- There is increasing onus on employers to reduce their carbon footprint. The enterprise sector has a dedicated section under the Climate Action Plan 2019 being tasked with reducing Green House Gas (GHG) emissions by 10%-15% by 2030. In order to meet this target enterprises must undertake initiatives within the workplace and throughout their work practices that will result in the reduction of GHG.
- In line with this, the EMRA RSES states that long distance car-based commuting is a key challenge that is leading to congestion of transport networks and has negative impacts on people’s quality of life and on the environment. As such, one of the key identified challenges facing the Region is the need for better alignment between population growth, location of residential development and employment to create healthy and attractive places.
- Addressing the core challenges of climate change will necessitate a greater focus on providing alternative transportation modes, creating more regional jobs as well as increasing opportunities for flexible working solutions (demand for which has significantly heightened in the current crisis context).

Legal

- In line with economic and technological trends and associated new ways of working, there are legal implications to be addressed with regards to new working arrangements. With the rise in remote and flexible working, there are many possible impacts which may emerge when an employee works outside of a main office, both positive and negative. In encouraging the take up of remote work in Ireland, DBEI (2019) identified potential difficulties in implementing a formal HR policy on remote work as a barrier to full roll out of such an initiative.
- A lack of clarity on Occupational Health and Safety requirements also leads to fear of litigation in the case of an accident. However, the current crisis and unprecedented shift towards remote working enables key lessons to be learned in a very short space of time.



Economic Trends and Drivers

Trends in employment have changed significantly since the beginning of the Covid-19 Pandemic, trends that were only starting to emerge before the pandemic are now being used by almost every employer in the country. Some of these trends, such as changing work practices and technological innovation have the potential to dramatically alter how the Irish economy functions.

Sectoral Shifts: The IDA's new strategy 'IDA Driving Recovery & Sustainable Growth Strategy 2021-2024' is framed through five interlinking pillars; Growth, Transformation, Regions, Sustainability and Impact. The growth pillar is of interest. The growth pillar states the IDA will target and win 800 investments in the sectors of Technology; Content, Consumer and Business Services; International Financial Services; Biopharmaceuticals & Food; Medical Technologies; and Engineering and Industrial Technologies. The IDA's strategy for growth and investment is heavily focused on knowledge intensive employment as the IDA recognises that these sectors have consistently shown agility and resilience and they align with Ireland's capabilities as a high value, high skilled location.

The World Economic Forum published 'The Future of Jobs Report' in October 2020 and as illustrated in Figure A3.2.1 overleaf, it shows the roles that are increasing in demand. All these roles are knowledge intensive employments roles which further highlights the potential sectoral shift currently happening.

Workplace trends: The IDA have envisaged 'A slow, uneven 'U-Shaped' global recovery' to the Covid-19 pandemic in the 'IDA Driving Recovery & Sustainable Growth Strategy

2021-2024'. This 'U-Shaped' recovery will accelerate the pre-pandemic trends in employment mentioned above. Multinational Companies will have to factor higher levels of remote working into their locational decisions and the trade-offs that come from locating in urban or regional areas could be altered. Technology adoption will also be accelerated by Multinational Companies, technology such as automation, AI and digitisation.

Remote working: Following on from a survey conducted in October 2020, researchers from the Whitaker Institute at NUI Galway and the Western Development Commission have published summary data from the second annual national remote working survey in Ireland in May 2021. This survey examined responses from over 6,400 employees. Some of the key findings are that, for those who could work remotely, 95% of respondents were in favour of working remotely some or all of the time which was a significant increase from the previous survey where 83% of respondents indicated the same. To accommodate the changing needs of the workforce, the Irish government supports existing digital hub centres and the development of new ones.³⁰

The report highlighted some of the advantages people see with working remotely such as no / less commute to work, a greater degree of flexibility on how they can manage their working day and a reduction in cost of going into work and commuting.

It is vital that these aspects and insights are understood as businesses will need to improve their workspace flexibility to face the economic uncertainty that will come after the eventual lifting of the lockdown restrictions. As a result, to accommodate the changing needs of the workforce, the Irish government supports existing digital hub centres and the development of new ones.

Pace of technology adoption: This trend of accelerated technology adoption is also highlighted within the World Economic

Forum's 'The Future of Jobs Report', the key findings show that the pace of technology adoption is expected to remain unabated and may accelerate in some areas and that in tandem with the Covid-19 recession, automation is creating a 'double-disruption' scenario for workers. Although the accelerated technology adoption will drive operational efficiencies and lower costs for companies it this will also considerably alter the nature of work and the profile of skills demand.

Potential for Dún Laoghaire to capitalise on these trends

The demand for coworking spaces is likely to rise significantly due to the changing trends mentioned above, and the desire to reduce commute times for the high number of business owners that reside in Dun Laoghaire Town and County. With this demand comes a huge opportunity for Dún Laoghaire town to capitalise on these trends and build key infrastructure to accommodate this.

With the increase in remote working and the likelihood of remote working being a common trend in the future, coworking spaces or digital hubs in Dún Laoghaire could potentially boost the local economy. With more people spending time working within or near the town during the week, these workers would likely take advantage of local amenities supporting local services and businesses within the town and potentially attract new businesses to the area.

As mentioned previously, accelerated technology adoption has its benefits but comes with negatives impacts as well. This presents an opportunity for Dún Laoghaire – Rathdown Council to provide strong support for transformative upskilling and innovative investment for at-risk or displaced workers. One of the key findings from the World Economic Forum's 'The Future of Jobs Report' was that the public sector needs to provide stronger support for reskilling and upskilling at-risk or displaced workers.

INCREASING DEMAND		DECREASING DEMAND	
1	Data Analysts and Scientists	1	Data Entry Clerks
2	AI and Machine Learning Specialists	2	Administrative and Executive Secretaries
3	Big Data Specialists	3	Accounting, Bookkeeping and Payroll Clerks
4	Digital Marketing and Strategy Specialists	4	Accountants and Auditors
5	Process Automation Specialists	5	Assembly and Factory Workers
6	Business Development Professionals	6	Business Services and Administration Managers
7	Digital Transformation Specialists	7	Client Information and Customer Services Workers
8	Information Security Analysts	8	General and Operations Managers
9	Software and Application Developers	9	Mechanics and Machinery Repairers
10	Internet of Things Specialists	10	Metal-Recording and Stock-Keeping Clerks
11	Project Managers	11	Financial Analyst
12	Business Services and Administration Managers	12	Postal Services Clerks
13	Database and Network Professionals	13	Sels Rep., Wholesale and Manuf., Tech and Scl.Products
14	Robotics Engineers	14	Relationship Managers
15	Strategic Advisors	15	Bank Tellers and Related Clerks
16	Management and Organisation Analysts	16	Door-To-Door Sales, News and Street Vendors
17	FinTech Engineers	17	Electronics and Telecoms Installers and Repairers
18	Mechanics and Machinery Repairers	18	Human Resources Specialists
19	Organisational Development Specialists	19	Training and Development Specialists
20	Risk Management Specialists	20	Construction Laborers

Figure A3.2.1: Top 20 jobs roles in increasing and decreasing demand across industries, source World Economic

30 - McCarthy, A., O'Connor, N., Ó Síocháin, T. and Frost, D. (2021). Remote Working: Ireland's National Survey - Phase III Report. Galway, Ireland: NUI Galway Whitaker Institute & Western Development Commission.

APPENDIX 4: SWOT ANALYSIS DETAIL



Appendix 4: SWOT Analysis Detail

Strengths

Strategic location

- **Strategically located within the Dublin region** and is near Dublin city centre employment opportunities
- **Multi-functional and major town centre** in relation to its surrounding urban settlements
- **Proximity of the harbour and associated recreation and outdoor activities to the town centre could motivate businesses to invest in the town**, particularly the tech sector.
- **Access to a good road, rail and seaport infrastructure** gives the area a huge comparative advantage that could be marketed and exploited as a means of attractive high value-added multinationals and start-ups into the area.

Accessibility

- **Easily accessed**, served by N31, N11/M11 and M50 all being within 20 minutes of the town centre
- **Well-connected by public transport** to and from city centre via Dublin Bus, Go-Ahead and DART
- **Coastal town with major harbour**, providing coastal and marine transport routes and links
- **Coastal Mobility Route has resulted in significantly more people accessing the waterfront by bike**, and has resulted in increased town centre footfall

Demographics

- **Dún Laoghaire Rathdown has positive demographic indicators.** The county has had the lowest unemployment rate in the State for the two most recent Census, a high percentage of persons in 'good health' status – 88.2% in 2016 in 'good' or 'very good' health status, and

the highest HP Deprivation Index score in Ireland at 10.0 (an indication of the level of overall affluence and deprivation with a higher number indicating relative affluence. This is significantly higher than the national (0.6) and Dublin (4.1) average

Educated and connected population

- **Access to a young talented workforce** through nearby key third-level institutions (IADT, UCD, UCD Smurfit, DFEI), which have a combined student population of over 36,000
- **Dún Laoghaire Rathdown has the highest percentage of persons in Ireland with third-level qualifications** with 47% of the population over 15 years having a third-level qualification
- **Dún Laoghaire Rathdown has a highly educated and skilled labour force**, with higher number of persons employed in professional, managerial and technical services than the national average.
- **Excellent broadband services within the town** – presence of both private and public Wi-Fi services and mobile phone service, an Eir NGN core agglomeration site proximal to the town and over 30 live, commenced, and planned fibre cabinets within the town
- **Single largest location for foreign direct investment in the County is at the Sandyford Business District** (27 IDA client companies)

Diversity of businesses

- **The town has a wide range of diverse business** ranging from independent retailers, many of which have been inexistence for long periods of time, as well as larger employers
- **The Glasshouse and Digital HQ** raising the profile of the town as a co-working destination.

Environment and streetscape

- **Distinctive sense of place and urban identity** through the abundance of historic architecture throughout the town, specifically along Georges Street
- **Strong natural capital**, the landscape, cultural heritage and biodiversity also represent valuable economic assets
- **Town is located along the scenic coast of south Dublin**, encompassing several Special Areas of Conservation (SAC) and Special Protection Areas (SPA) as well as natural and built amenities for recreation and leisure

Social capital and representation

- **Strong buy in and interest from local resident and business community** with groups such as the Tow Team, Dún Laoghaire Business Association, Dún Laoghaire central Residents Association, Tidy Towns

Recreation and amenity

- **Availability of both public and private recreation and leisure amenities** in the form of the West and East Pier walks, sailing and yacht clubs and public swimming areas adjacent to both sides of the Harbour
- **dlr Lexicon Library and Cultural Centre** strategically located between the town centre and waterfront
- **Expansive network of public parks and open spaces** **Public open spaces** such as People's Park, Newtownsmith, The Gut and Moran Park are all public parks in walking distance of the town centre and waterfront – the county is also enriched by its coastal and other diverse range of landscapes
- **Newly opened cycle lanes** along Crofton Road, Queens Road and Marine Parade as part of the new **Coastal Mobility Route** provides both a strength and opportunity for both multi-modal transport and new recreational facilities in the town

WeaknessesTown centre maintenance and vacancy

- **While vacancy in the town study area is lower than many other towns, there are key buildings that are vacancy which increase the perception of vacancy** including those adjacent to and owned by Dunnes Stores, the Carnegie Library and Park House.
- **Dún Laoghaire Shopping Centre's appearance detracts from Marine Road and Upper George's Street**, but the owners are currently limited in intervention options and commercial reality

Ageing population

- **While the town has access to a young, talented workforce, Dún Laoghaire has an ageing population**, with Dún Laoghaire-Rathdown being the oldest county in the state at an average age of 39, the town centre study area higher at an average of 40 years
- **Despite rapid growth from 1966-2016, the population growth rate of Dún Laoghaire-Rathdown is the lowest in the Dublin** with growth currently projected to remain low for the study area without policy interventions. **Since 2011 the student population of the town centre study area has declined by 10% and the retired population has grown by 2% reflecting the towns ageing population.**

- **High numbers with disability** – disability rate in the 2016 census for the county was 14.4%. This is likely to have increased since 2016 with a higher percentage of the population entering the 65 years or over cohort.

neability, parking and public realm

- While the town is well-connected to Dublin City and several key transport arteries **mobility and permeability within the town is constrained** – particularly when moving laterally through the town or perpendicular to the High Street
- **Poor connection between the town centre and the harbour** due to long-standing development patterns, primarily related to the development of the rail line which opened in 1834
- **Perception of a lack of parking while many spaces exist**
- **Restricted pedestrian and cycling mobility through the town centre**, Particularly along Georges Street
- **Legibility/distinctiveness** – visibility from the harbour in the direction of the town centre is lacking
- **Lack of focal points for people to gather in the town centre**, to be addressed by DLRCC at Myrtle Square and St Michael's Church

Retail and enterprise activity

- **Lack of high-end retail** – several discount stores and charity shops and a lack of high-end grocery and ladies' fashion and a lack of a town centre manager to encourage more variety of retail, and match investors to available places
- **Availability of high-end restaurants and bars** – high concentration of takeaways and fast-food outlets
- **Poor evening economy** due to lack of activity and perception of safety and security issues
- **Revenue from commercial rates** (which are a vital source of income to local authorities) are significantly lower because of 100% waiver applied to all businesses in view of constant lockdowns
- **Effects of Covid-19** and government lockdowns on retail activity within the town, as people are more risk averse to high street shopping
- **Limited availability of brownfield/infill sites** for either commercial or residential development
- **Lack of high-quality office spaces that are ready to occupy including large floor plate Grade A commercial space. Plans for developing such space at the ferry terminal could significantly help to address the shortfall**
- **Perceived lack of proactivity from DLRCC** in encouraging and facilitating new and innovative businesses to invest in the town, in retaining existing businesses, and in encouraging existing businesses to invest
- **Change of use of what were formerly commercial premises to residential** creates challenges, particularly where ground floor residential uses may become pepper potted through the commercial heart of the town thus reducing active commercial frontages.

Socioeconomics

- **The town experiences a net out-flow of workers**, with a job to resident workforce ratio of 0.68, which is below both the state and national average
- **Labour force participation rate for the study area is 55.2%, below the state and county average of 61.4% and 58.2%** (this can be due to the high percentage of the population being 65 years or older)
- While the town has a high HP Deprivation Index score, there are **pockets of disadvantaged areas in the town and surrounding area**, particularly in the areas of Tivoli and nearby Glashule.

Living costs

- Dún Laoghaire Rathdown has some of the **highest house purchase and rental prices in the state** – with median house prices for Dún Laoghaire being €562,500 in November 2020 and mean house prices for the area being €659,886
- **Highest childcare costs in the Eastern and Midland region**, with average weekly costs for full time childcare in the county at €213.94 in 2016
- **Living costs could deter people from choosing to locate or invest in Dún Laoghaire**

OpportunitiesConnecting the town to the waterfront

- **Opportunity to link the harbour to the town centre** through inter-agency dialogue and collaboration, and through physical interventions as outlined in the Urban Framework Plan incorporating a mix of uses, high quality public realm and improved pedestrian and cycle connectivity to the wider area.
- **Repurposing of the former ferry terminal for employment generating uses** could increase footfall to the town centre
- **The marine sector** could provide additional enterprise opportunities

Collaboration and investment

- **Collaboration between DLRCC and third level educational institutions** to identify ways to increase the student population in the town
- **Capitalising on highly skilled and educated local workforce** to attract multi-nationals and foreign direct investment through promotional campaigns and incentives.
- **Large numbers of FDI in greater DLR county could produce agglomeration effects**
- **Growing young entrepreneurial base** with social-media marketing models which could inject economic and enterprise activity within the town centre and harbour
- **The Draft CDP's policy objective towards enterprise and employment is to liaise with Enterprise Ireland and create opportunities in DLR for the promotion of research and development/innovation** – key for high-potential growth of economic activity

Changing perceptions

- **An effective positive promotional campaign** would help to reset the image of the town, change the narrative and reinforce a message that the town is a desirable place to live, work and visit, reimagining the town
- **Encouraging businesses to open on Sunday could reverse perception that the town is closed for visitors**, and encourage increased footfall

A focus on vibrancy

- **The role of town centres is evolving with an increasing move towards multifunctionality and 'experiential' retail.** This means that traditional measures of success such as footfall and retail spend are less relevant in terms of an indicator of success for a town centre. The focus is on the social, cultural, civic and economic role of the Town business and/or leisure, heritage and tourism.
- **Proximity of the harbour and associated recreation and outdoor activities to the town centre could motivate businesses to invest in the town**, particularly the tech sector.
- **More students in the town would mean more footfall, particularly in the evenings.** IADT are keen to work with DLRCC on initiatives to increase student population
- **An improved night-time economy** would enhance perception of the town as a desirable place to live and work
- **Increasing footfall, while not the only measure of success, could help to address actual and perceived anti-social behaviour through passive surveillance**
- **Encouraging more mixed-use developments with affordable housing** could help increase residential density in the town centre and make existing and new businesses more viable and contribute to 10-minute towns concept, a town for people to live in

Public realm as a catalyst

- **Pedestrianisation of George's Street Lower from St Michael's Church/Marine Road to St Michael's Hospital** could encourage increased footfall and provide opportunities for animation including opportunities for cafes and restaurants to provide additional outdoor seating. This could include enhanced shopfronts in a Victorian style to complement the high-quality architecture at first floor level.
- **Dún Laoghaire town has many beautiful buildings, with some negatively impacted by poor design at ground floor level.** There may be potential for an Architectural Conservation Area to define design, along George's Street
- **Continuing the public realm design from the waterfront to George's Street** i.e. materials and street furniture to reinforce the feeling the town and harbour are linked
- **A state-of-the-art wayfinding system** could encourage more people to decide to come to walk to the town from the waterfront
- **Dún Laoghaire Shopping Centre transitioning to a neighbourhood centre** and owners willing to discuss enhancement options with DLRCC
- **Dunnes Stores shareholders willing to discuss meanwhile use for vacant units with DLRCC**

Maximising recreation potential

- **Covid-19 provides a renewed appreciation of public space and town centres**
- **Increased focus on optimising/enhancing Green/Blue infrastructure** opportunities of the county
- **Provision of more opportunities for the public to engage in water sports in the harbour** was also cited as something that would encourage more people to want to live, work and invest in the town.

Changing work practices

- **Trends towards more remote/co-working in towns and villages provide a significant opportunity for Dún Laoghaire town.** Vacant upper floors and vacant buildings in public ownership are opportunities for delivering more co-working spaces.
- **Government support for remote and flexible working solutions** as a tool for regional growth, enhanced participation in the workforce and positive environmental impacts
- **2,800 new co-working and incubation spaces are to be located within the Dublin Region as part of the #Worksmartchallenge.** DLRCC will be providing 500 of these which is a significant contribution with the local authority already having the 2nd highest number of incubation spaces in the Dublin region
- **Changes in Consumer behaviour because of covid19** provides opportunities for digitalisation of services and changing the perspective on the meaning of 'experiential shopping'.

ThreatsJobs and unemployment

- **Threat of reduced jobs**, reflecting net loss of jobs in 2020
- **Threats of long-term unemployment amongst population particularly amongst young employed population** who are at increasing risk of employment disengagement and isolation – precipitated through Covid-19 lockdown measures
- **Long-term impacts of covid19** on both investment and construction of new housing – especially investments in housing, as the period for returns might be longer
- **Increased unemployment** is another driver for decreased housing demand
- **If Dún Laoghaire cannot maintain competitive edge** this could bring threat of major job loss
- **Tourism has been significantly affected by pandemic** and may continue to be impacted due to Brexit

Uneven growth

- **Economic expansion could bypass some socio-economic groups** given pocket areas of disadvantaged households and communities

Macroeconomic factors

- **Threat of Brexit impacting supply chains and feasibility of indigenous businesses** and the effect it will have on consumer prices
- **Threat of e-Commerce** in detracting from local businesses with a lack of online presence
- **Growth of out-of-town centre retail parks and shopping centres** has had a detrimental impact on smaller Irish town centres like Dún Laoghaire over the past decade.
- **Change in consumer behaviour because of covid19** with growing dependence on online shopping, affecting livelihoods of local shops and smaller businesses

- **New trend of flexible working/ working from home might further increase vacancy rates of offices.**

Safety and security

- **Perceived safety and security concerns within the town in certain areas of known anti-social behaviour** e.g. The Boylan Centre, Sussex St
- **High levels of traffic and car-dominance within the town centre** can push young families, cyclists and elderly away from the town centre

Increasing rents, rates and prices

- **Rising rates thought by some stakeholders to prohibit new business and enterprise start-ups within the town. They actually remained stable last year where they increased in other Dublin Counties**
- **High cost of housing** in both rental and purchase can force young families and young adults out of the town, increasing the risk of loss of culture and community
- **High retail turnover along Georges Street** can disincentivise new businesses locating to the town

DÚN LAOGHAIRE 2040



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