

# **The Dublin Mountains Visitor Centre Business Plan**



***- Final Report -***

**prepared for**

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&  
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**by**

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## **1. INTRODUCTION**

### **1.1 Project Overview**

The development of the Dublin Mountain Visitor Centre (DMVC) is intended to serve as a gateway to the wider leisure and tourism opportunities available in the Dublin Mountains. It will offer visitors a place of orientation and interpretation, informing them about the geography, archaeology, and history of the area – both the immediate area around Montpelier Hill, Massey's Wood, and the Hellfire Club, as well as the wider Dublin Mountains to the south. For those arriving at the Centre, who are unfamiliar with the area, the DMVC will provide an opportunity for some orientation and interpretation that will serve as an enjoyable start to their day-trip in the mountains

The concept of developing the Dublin Mountains Visitor Centre was first proposed in the 2007 Dublin Mountains Strategic Development Plan for Outdoor Recreation. It was subsequently identified in the South Dublin Tourism Strategy (2015) as a key component in the delivery of that strategy. It states, "The county's principal resource with potential for development for tourism is the Dublin Mountains". The proposal is also included as a specific objective in the 2016 – 2022 South Dublin Development Plan.

The improved walks, access and parking facilities proposed will expand the mountain's recreation, leisure and cultural offer. Accommodating a café, shop, toilets, walkers lounge and an interpretative exhibition / education facility, the visitors centre building will provide services for walkers and other visitors to the mountains, as well as being a destination in itself. The project proposal also includes improvements to the setting of the Hell Fire Club, thereby assisting in branding this generally little-known national monument as a 'must see' attraction for day-trippers and tourists alike.

As a tourist facility, the development is fully aligned with the 2015 Fáilte Ireland / Grow Dublin Tourism Alliance strategic plan - Dublin – A Breath of Fresh Air - and its campaign to reposition the city and county as a destination for overseas visitors.

There is therefore a very particular tourism context to this project. In addition to providing facilities for existing recreational users in the mountains (the Dublin Mountains Partnership estimate that there are currently approx.100,000 such users in the Hellfire / Cruagh / Massey's Wood area), it is the intention of the Council to enhance the experience for those visiting South County Dublin and who are unfamiliar with its

landscape, heritage, and attractions. The project therefore has a particular focus on tourism development in South County Dublin, on providing a better tourism experience for those visiting the area, on increasing dwell time in the area, and consequently increasing tourist expenditure on goods and services in the area. In terms of medium term development, this will have the effect of increasing economic activity and jobs in South County Dublin.

## 1.2 Vision, Mission and Objectives

The mission of South Dublin County Council (SDCC) has been described as:<sup>1</sup>

**“To make our county the best possible place  
in which to live, work and do business”**

Elsewhere in the Council’s Corporate Plan (p7), it is noted that *“economic development is at the heart of everything we do”*. Drawing on this mission, and its related economic development focus, the following vision, mission, and objectives can be presented for the DMVC development.

**Vision:** That the Dublin Mountains, its landscape, heritage, and stories, will be fully accessible and readily enjoyed by all who visit the area.

**Mission:** To provide high quality facilities and services, both for residents and for visitors to the county, and to support the development of tourism as a source of increased economic activity and job creation.

**Objectives:**

- 1) To provide an enhanced recreational facility for residents of South Dublin County Council and beyond.
- 2) To provide a point of orientation and interpretation for visitors, who are unfamiliar with South Dublin’s landscape, heritage, and stories and who, in the absence of such a facility, will leave the area sooner, and with a very limited understanding of what the Dublin Mountains can offer.
- 3) To develop a visitor centre facility providing essential services for visitors to Massy’s Wood, Montpelier Hill and the Dublin Mountains generally.
- 4) To improve the quantity and quality of walks and trails in and around

<sup>1</sup> South Dublin County Council Corporate Plan 2015 - 2019

the subject sites, for people of all ages and abilities.

- 5) To conserve the archaeological and architectural heritage of the sites in accordance with international best practice.
- 6) To support the growth and expansion of the tourism sector in South County Dublin.
- 7) To secure - over the medium term - an increased share of overnight stays in South Dublin, as this is the more lucrative and job-creating component of the leisure tourism market.
- 8) To increase economic activity and jobs in South Dublin.
- 9) To provide increased car parking and improved access – including public transport – to the subject site.
- 10) To achieve the above objectives in a manner that is economically, socially, and environmentally sustainable.

### **1.3 Project Focus**

The primary focus of the project is the development of a 26 hectare site in the vicinity of Montpelier Hill, Massey's Wood, and the Hellfire Club. The principal purpose is to improve the visitor experience for those who come to the area. This will be achieved through the implementation of the following measures:

- Improved trail networks with signage, resting points, seating and views.
- Construction of a “bridgehouse” and tree-top walkway/bridge across the R115 from Montpelier Hill and Massey's Wood properties.
- Construction of the proposed visitor centre building, terraces, steps and walkways in its surrounding.
- Modification to existing and construction of new walks and trails in and around the Montpelier Hill and Massey's Wood properties.
- Conservation works to architectural and archeological heritage on the Montpelier Hill and Massey's Wood sites.
- Information on the woodlands and on the flora and fauna it supports.
- Improved signage and interpretation telling the stories associated with particular locations.
- A particular focus on the Hellfire Club that will enable visitors to learn about its past, its heritage, and its stories.
- Information about the area's rich archeological heritage – particularly the Hellfire Club and Massey's Estate (this is currently not readily accessible for most visitors).

- Opening viewing points to Dublin City and Dublin Bay.
- Interpretation and orientation on hill-walking in the wider Dublin Mountains
- A Treetop Canopy Walkway from the car park to Massey's Wood.
- Free car parking.

These improved facilities, and the enhanced interpretation that will be developed in parallel with them, will be free to access for all visitors to the area. In order to support this primary focus, a range of support services will also be developed on site. These will include:

- A visitor centre with a reception and information point which will provide orientation for visitors relating both to the immediate 26 hectare site, and also to recreational opportunities in the wider Dublin Mountains.
- An AV exhibition telling the stories of the Dublin Mountains – landscape, trails, heritage, archaeology, as well as the folklore and stories associated with the mountains.
- A meeting room for schools groups and other special interest group events.
- Toilet facilities
- A restaurant and shop.

An additional focus of the project is to address challenges arising from the current unregulated use of the area. These challenges relate to traffic congestion, irregular parking, and consequential safety issues. These matters have previously been identified in a document<sup>2</sup> jointly prepared by SDCC, Coillte, and The Dublin Mountains Partnership which set out the concept for the project. In this document it was noted that:

*“The existing parking capacity on the Hellfire site is regularly exceeded and pressure is expected to grow. This causes uncontrolled parking on the R115 which leads to safety issues. It is proposed to extend the existing car park to cater for increased visitor numbers. This would take place as part of the wider landscape/forest park development. Existing conifer trees around the parking area, which are approaching end of life and due for felling, would be replaced by new, sustainable forest planting, Pedestrian access from the parking area to the wider site would be improved.”*

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<sup>2</sup> <file:///C:/Users/Aidan/Downloads/Dublin%20Mountains%20Project%20Concept.pdf>

It is expected that the development of the DMVC will improve the Dublin Mountains experience both for local people walking in the mountains as well as for tourists visiting the area. Whilst it is expected that the new DMVC facility will support tourism development in the area, it is not intended that the newly developed facilities should be operated for commercial gain.



## 2. MARKET ASSESSMENT

### 2.1 Overview

It is expected that the DMVC will meet the interests and needs of a number of different user groups. These are summarised in Table 2.1 below.

**Table 2.1: Market Overview**

Market	Characteristics
Local Amenity	These are local residents (typically in the South Dublin area) who use the mountains for recreational activities such as walking, hill-walking, jogging, for an afternoon out with the family. As local people they are unlikely to be interested in the shop and information services available at the DMVC, although they do represent a market segment that would be interested in the restaurant facility.
Domestic Tourism	These are people resident outside the South Dublin area who are typically visiting Dublin for a short break. It is Fáilte Ireland policy to encourage visitors on a short break to Dublin, to consider visiting Dublin Bay and the Dublin Mountains as features which are uniquely offered by Dublin as a short break destination. Given that these people do not live in South Dublin, their expenditure in the area represents a net expansion of the South Dublin economy.
International Tourism	People visiting Dublin from overseas represent a strong net expansion of the Dublin economy. They tend to stay longer and spend more. Because they stay longer they have a greater impact on the important evening economy – this is the hospitality sector where most money is spent on services provided by hotels (and other accommodation services), restaurants and bars. Overseas tourists have been identified as the priority target for Irish tourism development.
Schools	The immediate area around the proposed DMVC development has a very rich heritage and archaeological resource. In addition to general tourists and those with a particular interest in these subjects, the DMVC will serve as a particularly valuable facility to support the school tour market.
Corporate	As a unique facility in the setting of the Dublin Mountains, the DMVC can provide an attractive location for small bespoke corporate events. This could include corporate meetings, management away days, training events, or team-building activities outdoors.

These represent core markets for the DMVC. However it is likely that, as the Centre develops, it could provide other services such as guiding, group tours, specialist heritage and entertainment events, and adventure/activity services. However in relation to the latter it will be an operational requirement for the centre to ensure that any services it provides represent additionality. Opportunities to secure potential synergies and complementary linkages with existing service providers in the area will be prioritised.

## **2.2 Product Definition**

Product definition at the DMVC can be most readily understood in relation to the services and activities that will be available there. Table 2.2 below sets out an indicative inventory of services and activities that could be available at the Centre, and their capacity to generate revenues to sustain the operations of the DMVC. Within the context of this business plan, the priority is to develop services and activities that align with the interests of the market segments identified in Table 2.1 above.

**Table 2.2: Product Definition – Services & Activities**

<b>Service/Activity</b>	<b>Comments</b>	<b>Revenue Potential</b>
<b>Information &amp; Interpretation</b>	Information and interpretation is the fundamental function of the Centre. A permanent exhibition will inform visitors about the archaeology, geology, history, folklore, and traditions of the area. This will be developed using leading inter-active technology designed to deliver an entertaining and engaging experience to the visitor. Separately, a meeting room will also be available to meet the needs of school groups, historical societies, special interest groups, and corporate groups. While visitors themselves will ultimately determine how they wish to experience the area around the Visitor Centre, it's expected that, for those unfamiliar with the Dublin Mountains, the information and interpretation provided will enrich the visitor experience, and will also help visitors to find an orientation that best suits their own interests and maximises their enjoyment during the time available for their visit.	Significant
<b>Food/Catering</b>	A food offering will be available at the Centre through a 75 seat café/restaurant which will provide good quality food with a counter service.	Significant
<b>Retail</b>	A shop stocking souvenir items and goods relevant to outdoor activities such as hill walking.	Some potential

<b>Service/Activity</b>	<b>Comments</b>	<b>Revenue Potential</b>
<b>Car Parking</b>	The Centre will have parking spaces for 330 vehicles. Car parking will be free.	n/a
<b>Toilets</b>	One wing of the facility will have a toilet block with internal and external access. The second wing of the facility will have a toilet block and changing facilities.	None
<b>Guiding Services</b>	While guiding services are unlikely to be required by all visitors, there are some who will wish to go on specialist guided walks. These would include groups who wish to walk the mountains and require a guide to provide information on local flora and fauna. Because of the rich archaeology at the site, there will also be special interest groups/individuals who will engage a guide to ensure that they can understand and enjoy the full historic story of the area.	Some Potential
<b>Storage</b>	Storage and locker facilities will be required by some visitors who may wish to spend a few hours exploring the area without carrying bags, wallets etc.	Limited
<b>Low-Intensity Walk</b>	Walking is very much the core activity associated with the Massey's Wood/Montpelier Hill area. The Centre can support this with maps, orientation, and advice on the most suitable routes. In this respect it is important to bear in mind that walking will be experienced at different levels, to different degrees of intensity, by different types of visitor. The Centre must have the capability to engage with these different visitors in a manner that best suits their needs. At the most fundamental level, non-specialist, low-intensity walkers are likely (to a significant extent) to be the most typical group visiting the centre. These will include family groups with young children, older people, visitors with a specific interest (e.g. archaeology) who will nevertheless walk around the area, and others who are simply local people enjoying a casual one-hour stroll. The information or equipment-hire needs of these visitors is likely to be limited.	Limited
<b>Medium-Intensity Walk</b>	Medium-intensity walkers are those who plan to spend a half-day in the mountains, perhaps hiking for four to five hours. They are likely to be somewhat more demanding in terms of identifying the best routes to walk, places of particular interest along different routes, areas of particular challenge, and viewpoints. These visitors are more likely to be interested in guiding and storage facilities. The target market for this type of visitor could be small active groups of friends visiting Dublin City for 2/3 nights, and who are looking for something different to do for a half day or so.	Limited

<b>Service/Activity</b>	<b>Comments</b>	<b>Revenue Potential</b>
<b>High-Intensity Walk</b>	High-intensity walkers are likely to be experienced walkers who plan to walk for more than one day. They are likely to have less demand for guiding services, but could require support in relation to accommodation and transport transfer services.	Limited
<b>Education Events</b>	The meeting room at the Centre is intended to serve the needs of school groups visiting the facility. Given the archaeology and history of the area, there is potential to develop strong education services on site. This could be combined with a short guided walk of the area. Given the tourism nature of the Centre however, these education events should be designed to deliver their message through a fusion of education, entertainment, and outdoor exploration. The meeting room is also expected to be used for occasional lectures and special interest group meetings/receptions.	Significant
<b>Corporate Events</b>	The Centre is well positioned to capture some small corporate events in the MICE sector (Meetings, Incentives, Conferences, and Events). While the facility is not designed to cater for large corporate conferences or receptions, it can target corporate events typically involving between 15-30 participants. This could include training events, business strategy “away days”, or team-building activity. These events typically require proximity to a wide open space, some meeting room/s to analyse and debrief after the activity, and catering facilities to provide a small food/drinks reception for participants.	Significant
<b>Hellfire Themed Events</b>	The Hellfire Club is a unique and very significant feature at the Massey’s Wood/Montpelier Hill site. It could be used as a venue (supported by facilities at the Centre) for a variety of activities ranging from mildly scary story-telling for children, to darker stories, readings, short plays, and re-enactments for adults. These could be offered to the Group Tour market with a clear delineation between events designed for children, and those for an adult audience. There could also be opportunities to cross-sell the Hellfire Club Experience to the small corporate event groups referenced above.	Some Potential

## **2.3 Location and Source Markets**

The source market for the DMVC is comprised of two main components which are set out below.

### **2.3.1 Local Residents and Day Trippers**

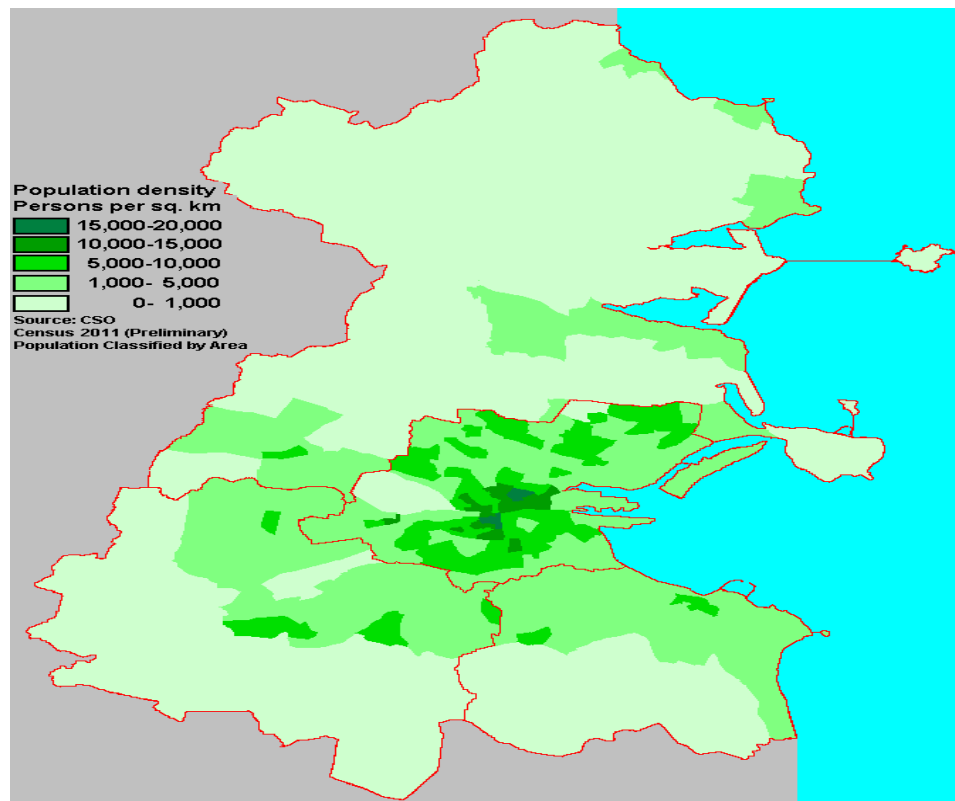
The DMVC is well positioned to benefit from the comparatively densely populated areas south of Dublin city centre. It is estimated that there are already some 100,000 annual users of the Hell Fire/Cruagh/Massey's Woods area (although there is a growing level of concern in relation to the unregulated nature of this usage). This represents a base market for the services that will be provided on site. The surrounding Greater Dublin Area, with a population of 2 million residents, represents a significant source of demand with potential to produce increased numbers for the DMVC. Whilst these people are not local residents, they are a set of potential day-trippers who will be interested in something interesting to do and see nearby, without having to organise an overnight stay. The population density of this area is presented Table 2.1 overleaf.

The schools' sector represents a significant sub-component of this this local population base, particularly for facilities offering heritage and archeology programmes in an outdoor recreation setting. There is, therefore, potential for the DMVC to attract school groups from both primary and secondary levels. It is estimated that school groups will travel distances of up to 90 minutes for a school outing. There are approx. 321,000 school aged children in the Greater Dublin Area<sup>3</sup>.

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<sup>3</sup> CSO

**Figure 2.1: Catchment Area for DMVC**

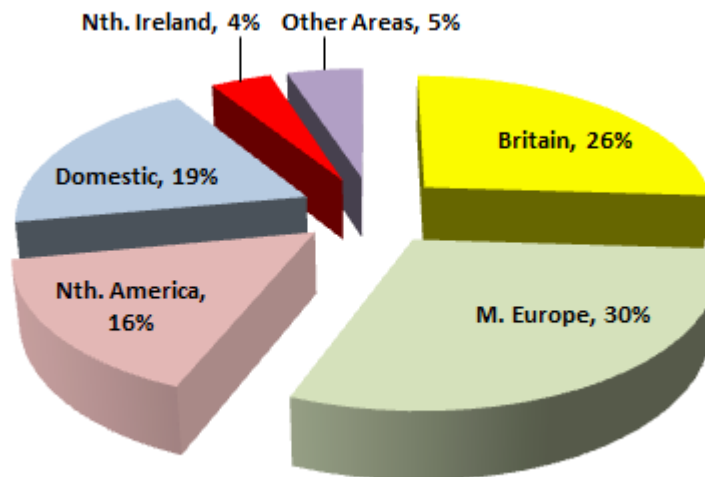


### 2.3.2 Tourism

Dublin attracted 5.7 million overseas visitors in 2016, plus a further 1.7 million overnight visits from residents of the island of Ireland. This represents a sizeable and economically important market for any business in the Dublin area. The breakdown of the tourism market is presented in Figure 2.2 overleaf and shows Britain and the Domestic market as the two largest source markets. Mainland Europe is also a significant market, accounting for 30% of visitors.

It is expected that South Dublin County Council will work closely with Fáilte Ireland to ensure that the DMVC features in its marketing and messaging, and so secures a prominence in Ireland's source markets. It is planned to introduce a significant digital marketing campaign to promote the Centre in digital and social media (where some 80% of visitors now research, plan, book, and pay for their leisure break).

**Figure 2.2: Distribution of Tourism to Dublin by Source Market (2016)**



## 2.4 Consumer Profiling

### 2.4.1 Segmentation Analysis and Positioning

The national tourism agencies (Fáilte Ireland and Tourism Ireland) have identified key consumer segments that are considered to offer the best potential for Irish tourism businesses. This segmentation analysis allows for a more targeted approach to tourism market development, and is based on messaging only to those segments known to be interested in what Dublin can offer. The profile and attributes of these consumers is presented in Table 2.3 below.

**Table 2.3: Consumer Segments and their fit with the Dublin Mountains Centre**

Segment	Overview	Reasons the Dublin Mountains Centre Would be Attractive
<b>Primary Segments</b>		
<b>Culturally Curious (overseas)</b>	Travellers (+45yrs) taking a break with a partner, or in a group. They are interested in broadening their minds and expanding their experience by exploring new landscapes, history and culture. They will be interested in opportunities to walk, and in fine dining.	Cultural visitors will be attracted by the history of the site - the excavated prehistoric tomb, supported by stories collected from the local community - and by its ability to unlock the broader heritage and natural history of the Dublin Mountains. The opportunities to walk and dine will also be attractive to them.
<b>Great Escapers (overseas)</b>	They are taking time out in nature with a partner, and sometimes a young family, in order to reconnect. They are mainly interested in rural holidays.	They would be drawn by the site as an orientation point for nature-based activities. Great Escapers, on the whole, are not interested in a city break, and therefore will only be a significant market for a recreation centre in the Dublin Mountains as a starting-point to a rural holiday (they arrive into and leave the country mainly through Dublin).
<b>Connected Families (domestic)</b>	These families are looking for opportunities to spend time together through shared experiences. This accounts for almost a quarter of the domestic market.	An easily-accessible outdoor amenity on a popular site, suitable for all ages.
<b>Local Catchment Area</b>	Residents living within 30mins of the site	An upgraded recreational amenity, suitable for all ages. A meeting point for friends / colleagues. A new evening venue for hire.
<b>Secondary Segments</b>		
<b>Social Energisers (mainly UK)</b>	Younger visitors who are like to holiday in groups or as couples, looking for an exciting trip in a vibrant destination. They are interested in urban destinations and places that have a range of experiences within easy distance of each other.	An opportunity for shared outdoor adventures (e.g. tree-top walk) within easy reach of Dublin city centre. However, Social Energisers are primarily drawn by unique, cool, 'share-worthy' experiences and, in this context, the 'Hellfire Club' theme would be particularly attractive to them because of its shadowy history and the link to the paranormal.
<b>Schools (within 90 mins)</b>	Schools routinely look for new venues for school outings - with primary school classes 2nd-6th and TY being particularly suitable for outdoor recreation.	A new, well-managed outdoor amenity within easy driving distance.
<b>Meetings &amp; Incentives (overseas)</b>	The meetings and incentive markets seek unique and unusual venues/experiences to complete their overseas programmes.	An unusual venue, suitable for small meetings, team-building activities and evening entertainment/dining. The 'Hellfire Club' theme would be attractive to this segment.



## **2.5 Competitors**

The DMVC has no direct competitors in the immediate area although mountain bike hire is available at Ticknock, along with tea, coffee and snacks, operated by biking.ie. It is not planned to run the centre as a commercial business operating on a purely “for profit” basis. In terms of its core purpose in providing orientation and interpretation, it is very much an entity delivering a “public good” service. Equally, while there are other large parks in the South Dublin County Council area, none are situated in the Dublin Mountains, and none possess the types of facilities and services that the DMVC will offer.

## **2.6 Branding**

### **2.6.1 Overview**

Brand importance and “brand equity” are significant considerations with any new venture. This is true of the DMVC, and even if the facility does not need a “brand”, it certainly needs a distinct identity. In many respects “brand” and “identity” are the same thing, and they both serve much the same purpose. Without a distinct identity, the DMVC cannot be promoted – and therefore, in the absence of a strong identity, it will struggle to operate on a sustainable basis.

Choosing a brand name and positioning for a new tourism experience can be challenging. The best brand names have an intrinsic association with the experience they offer. They should be readily usable (i.e. not too long or difficult to pronounce), should not have an obvious shelf-life, and have a resonance with their target user group. In addition, consideration needs to be given to online marketing - availability of domain name, ease of spelling, and existing use of similar names.

In the case of the DMVC, there are a number of obvious names that arise from the location in question, and it might be expected that a brand development exercise would draw upon some/all of these names. For illustrative purposes, some examples could include:

- The Dublin Mountains (Great Outdoors)
- Montpelier Hill (Recreation Centre)
- The Hellfire Club (Dublin Mountains’ Centre)

In a conventional brand development exercise a number of key questions are typically explored to help identify the best options. This process is illustrated in Table 2.4 below.

**Table 2.4: Exploring Brand Name Options**

Question	DM Great Outdoors	Montpelier Hill	Hellfire Club
Is there an intrinsic association with the site/experience?	Yes	Yes	Yes
Will it 'stand out' in the marketplace?	Not particularly	Not particularly	Yes
Is it easy to remember/spell, etc.?	No - too long	No - variations of Montpelier include the French town Montpelier.	Yes
Is it already in use in the marketplace?	Not directly but there are a number of Dublin Mountain recreation sites already in existence which might cause confusion.	No	There is a walking tour that has taken the url: <a href="http://www.hellfireclubdublin.com">www.hellfireclubdublin.com</a> but <a href="http://www.hellfireclub.ie">www.hellfireclub.ie</a> appears to be available.  It is also the name by which it is best known by existing 'users' of the site.
Does it connect with the target market?	Yes - mainly due to the mention of 'mountains' and 'outdoors'. It connects on a logical level - 'does what it says on the tin'.	No, except for the mention of 'recreation' and for local residents who would be familiar with the geographic name.	It would stimulate curiosity and, on a deeper level, connect with phases of Irish history – though it might not overtly connect with outdoor recreation consumers.
Is it flexible enough to build on (i.e. to add additional experiences/products to)?	Moderately	Moderately	Moderately
Does it align well with existing tourism promotions/activities?	Yes – it connects with the Dublin <i>Breath of Fresh Air</i> campaign.	Not particularly	Moderately - it integrates Dublin's Mountains into the <i>Vibe of the City</i> experience and also connects with other historical sites and Ireland's Ancient East brand (e.g. Castletown House).

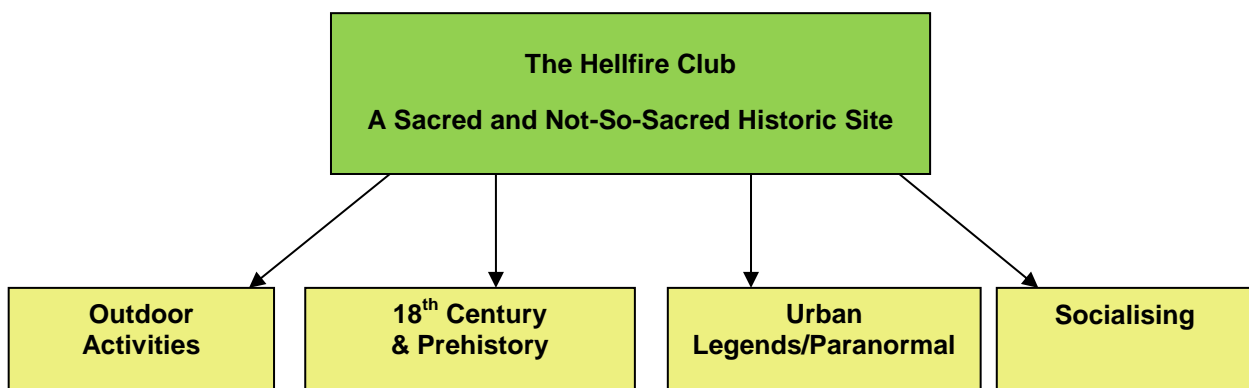
Of these potential forms of identity, the Hellfire Club and Dublin Mountains Great Outdoors appear strongest in terms of positioning and therefore are further considered below.

### 2.6.2 The Hellfire Club

As a name, the “Hellfire Club” already is recognised around Dublin, both as a site for walking, and as a place with connections to the paranormal. Recent excavation work has added an extra layer of interest to the site for those already familiar with its story. As such, the use of “Hellfire” as a primary brand would build on a certain amount of established awareness locally, and could stimulate curiosity among potential visitors from overseas, who might be intrigued by the potential experience inferred or promised by such a brand.

Furthermore, using “Hellfire” as a brand would allow the new Centre to be positioned more broadly than using a name that is solely focused on the outdoor leisure and recreational aspects of the mountains. It would also generate potential for the development of a number of different (non-outdoors, non-activity) themes that could be of interest to a broader range of consumers.

**Figure 2.1: The Hellfire Club Brand Positioning & Associated Themes**



*A location of importance for thousands of years, the Hellfire Club<sup>4</sup> remains an important access point today for adventures into the Dublin Mountains and beyond...*

As a brand, “Hellfire” could support a number of diverse experiences. Its positioning is broad enough to encompass not only outdoor recreation, but also history/heritage, corporate events, and socialising for adult groups interested in an alternative paranormal experience. It could certainly support a quirky evening experience for visitors to the DMVC. Moreover, it has a very obvious capability to support special events at Halloween,

<sup>4</sup> Hellfire Clubs were a feature of British society in the 18th Century and the Hellfire Caves, West Wycombe, remain a visitor attraction (albeit a relatively undeveloped one, given the location & management approach).

and in the darker evenings of the important (off-season) shoulder season when it can be difficult to attract visitors to Dublin.

### **2.6.3 The Dublin Mountains Great Outdoors**

The “Hellfire” brand is undoubtedly strong, and it performs well when tested in the context of Table 2.4 above. Superficially therefore, the term “Hellfire” is a strong candidate as the over-arching brand for the DMVC. However there are also some reservations about the use of the “Hellfire” term as the primary feature of the new brand/identity for the DMVC. These are set out below:

- 1) The word “Hellfire” – while attractive in terms of its immediate recognition factor around the anticipated experience to be delivered – could prove to be a negative factor in certain market segments, and most importantly in the family market segment (families with young children).
- 2) The word “Hellfire” also conjures up a narrow set of activities or experiences which could attract a young adult audience, but which might deter a more mainstream audience from visiting the DMVC.
- 3) In terms of experience delivery, the Hellfire brand could represent a narrower window of opportunity – Halloween and the darker winter evenings.

In view of the above, “Hellfire” might be positioned as a secondary brand feature. The primary brand/identity at the DMVC Centre could then focus on key words such as “Dublin” and “Mountains”. This could take the form of a headline brand such as – **The Dublin Mountains Great Outdoors**. In that event, the “Hellfire” terminology could serve as a secondary brand/identity, such as **Discover Hellfire at the Dublin Mountains**. In this arrangement, the brand/identity could remain true to the principal asset descriptor, and to the values of the principal market segments likely to be attracted to the Dublin Mountains, while remaining mindful of the “Dublin Noir” market segment, and the extent to which the Hellfire Club could play a role in fulfilling the expectations of this segment.

These comments are offered for consideration only. It is understood that this matter will be the subject of further discussion within SDCC.

## **2.7 Summary of Demand Projections**

Demand projections are set out in Table 2.5. This is the base case used in the Financial Analysis (Section 4 below). It is based on a pre-existing cohort of local amenity users (estimated at 100,000), with a prudent estimate of tourism (visitor numbers) growth over the first five years of operation. With appropriate marketing and management, and if the figure of 225,000 is attained by year 5 or so, it would not be unreasonable for the DMVC to set a target of 300,000 visitors over the subsequent five year period.

**Table 2.5: Demand Projections**

<b>Visitor Numbers</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>
	125,000	150,000	175,000	200,000	225,000

### **3. OPERATIONS AND MARKETING**

#### **3.1 Operating Approach**

It is intended that the DMVC will operate on a cost neutral basis. It is not expected, therefore, that the operation of the centre will involve the Council in recurring annual costs. A principal feature of the operation of the DMVC will be to maintain a clear focus on its core functions of providing activities in the immediate vicinity of the centre, and the provision of orientation and interpretation to support those visitors who wish to explore the wider Dublin Mountains. The principal tourism asset of interest to visitors remains the Dublin Mountains themselves, their landscape and heritage, as well as the immediate area around the development site incorporating Massey Wood, the Hellfire Club and Montpelier Hill. It is not expected that the DMVC should in any way displace this, or that it should be operated or presented as the principal reason to visit the area. Equally, it is important that, while the facility will operate on a cost neutral basis, it should not bring an undue level of commercial activity into a sensitive natural heritage location such as the proposed development site.

#### **3.2 Marketing Approach**

The marketing approach must be developed based on a multi-channel strategy consisting of the following elements:

- Direct online channels of distribution – these include the DMVC’s own website and booking engine provider
- Indirect online (for example Booking.com, Expedia)
- Social Media: Facebook, Twitter and, possibly Instagram and YouTube
- Comparator review sites (e.g. Tripadvisor)
- Google advertising
- Offline channels include agents such as tour group operators and consortia groups (e.g. Leading Hotels).

Given the findings of recent research into online consumer behaviour, the marketing strategy should be heavily weighted to online channels, and in particular those channels with significant UGC (user generated content) commentary. There is considerable evidence that contemporary consumers will be more influenced by experiences and content posted by their peers than by any official authority, such as a tourism board.

### **3.3 Digital Marketing**

Recent research reports that 95% of consumers search on-line before making a travel purchase<sup>5</sup>. Trends in how consumers make their travel and tourism decisions have been characterised across four stages as follows:

- 1) I want to get away: Dreaming Moments
- 2) I want this trip to be perfect: Planning Moments
- 3) I want to book it: Booking Moments
- 4) I want to make the most of it: Experience Moments.

Consumer research reports that 87% of these ‘moments’ now take place on mobile devices. The significance of this insight is that not only are tourism consumers heavily connected to on-line sources of information and communications, they are now accessing this information “on the go” through mobile devices such as their smartphones and tablets. The digital marketing campaign to support the DMVC must therefore be designed and constructed specifically so that it is accessible to consumers on their mobile devices. Sales and marketing strategies should therefore have particular regard to the online travel ecosystem set out in Figure 3.1 overleaf.

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<sup>5</sup> Source: Fáilte Ireland

Figure 3.1: Online Travel Ecosystem<sup>6</sup>



The particular importance of communicating with visitors after they have arrived in Ireland, is captured in Figure 3.2, which indicates that 69% of visitors use their own phone to find out what there is to “see and do”, **once they have arrived** in a particular destination.

<sup>6</sup> Source: Fáilte Ireland, *Mobile Trends Impacting the Visitor Journey*, March 2017



Figure 3.2: Device Used to Look Up Inline Information<sup>7</sup>



The implication of this finding is that consumers do not research and book their holiday in full prior to departure. Typically, they first decide where to go, they decide what it is that interests them in that destination (things to see and do), and they then book one or two nights' accommodation. However, they also use their mobile devices while in the destination in order to decide what they wish to do. Therefore the DMVC website will need to be configured so that it is fully accessible by mobile devices, and so that visitors to Dublin will find the website readily accessible during their stay. It is important that a day out in the Dublin Mountains emerges in search engines in the top five suggested things to do.

As noted in Fáilte Ireland research<sup>8</sup>, “visitors will have already assured themselves that the destination is for them and offers lots of things to see and do. Attractions, festivals and activity providers must be easily found online in order to feature on proposed itineraries as 92% of visitors who continue to look up information online, while in-destination, will do so on their own tablet, laptop or smart phone”.

<sup>7</sup> Source: Fáilte Ireland, *Mobile Trends Impacting the Visitor Journey*, March 2017

<sup>8</sup> Ibid

### **3.4 Sales Capability**

It will be important to sell the DMVC actively and aggressively in the chosen distribution channels. Marketing and promotion campaigns, of themselves, are insufficient to close a purchase with a consumer. It will also be important that the DMVC has the capability to allow consumers to book and pay online (for events, tours, guides, corporate events etc.). It must be recognised, therefore, that marketing and selling are two different activities. Marketing creates awareness, but selling closes the sale. The visitor growth forecast presented in the following section will depend to a great extent on the latter rather than the former.

## **4. FINANCIAL ANALYSIS**

### **4.1 Capital Costs**

The DMVC project was originally costed at a total investment of €22 million. At that point it was planned to develop a facility of 2,000m<sup>2</sup>. Since then the project has been significantly re-sized and is now planned at a scale of approx. 750 m<sup>2</sup>. The associated capital cost has been estimated to be €15m. While the final capital cost is relevant to an economic evaluation of the project, it is less significant in the preparation of this business plan where it is assumed that the project will not be required to remunerate the capital sum invested in its development through the generation of operational revenues.

### **4.2 Visitor Numbers**

The demand for the services and activities available at the DMVC will ultimately be a function of visitor numbers. The core service at the centre – the provision of information, orientation, and interpretation - will be provided free of charge. So also will car parking as it is considered inappropriate to introduce a pricing regime which might deter or limit the numbers of visitors to the mountains. During the initial period of its operation (first five years), it is expected that demand for the services available at the DMVC can be structured across five target groups as set out in Table 4.1 overleaf.

The analysis presented in this section is referred to as the “base case” because it represents a core level of demand and activity. The business plan is developed on the basis of these five areas of demand over the first five years of operation. Equally, the service lines are considered to consist of information provision, an exhibition, a restaurant, a souvenir shop selling branded merchandise, and a meeting space for schools/corporate groups. In this base case, these service lines represent the principal opportunities for revenue generation at the DMVC. Notwithstanding that this is the basis for the preparation of the business plan, it is expected that additional services could be introduced in the future (e.g. guiding services, guided tours, equipment hire, lectures, creative and cultural events).

**Table 4.1: Demand Structure**

Target Group	Profile
<b>Local Amenity Users</b>	Residents living in the wider South Dublin area, and who are habitual visitors to the Massey's Wood, Montpelier Hill, Hellfire Club area of the Dublin Mountains are considered to be "users of local amenity". They are not tourists, and their existence and impact would not be included in a conventional tourism impact assessment. However in the preparation of a business plan for the DMVC, they are a relevant factor and are accordingly included. It is also assumed that, as local amenity users, they may have limited interest in information services, the exhibition, and the gift shop. It is, however, considered that they will represent a significant component of the customer base for the restaurant. Later in this section, these local amenity users will be identified as a potentially important component of restaurant demand. So although they are not tourists, this group is important in underpinning the demand base for a new facility which has been designed primarily to support tourism development.
<b>International Tourists</b>	It is expected that the DMVC will grow as a facility of interest to international tourists <sup>9</sup> . This is significant as it aligns with the government's stated policy of growing the number of international visitors to Ireland, and to prioritising infrastructural investments that can demonstrate a capacity to deliver on this outcome. Tourism is an export industry and, consequently, any expansion in tourism represents a net expansion of the Irish economy. It is considered that international tourists are likely to be interested in all the services available at the DMVC.
<b>Domestic Tourists</b>	Domestic tourists are essentially those traveling to the DMVC from outside the Dublin area. They are likely to be interested in all the services available at the DMVC.
<b>Schools &amp; Special Interest Groups</b>	It is considered that the DMVC could develop a strong schools programme over the first five years of its operation. Given the nature of the natural heritage at the site, the strong (and still emerging) archaeology and heritage associated with the location, as well as the opportunities afforded for outdoor recreation, it should be possible to provide educators with a compelling full or half-day programme. This is likely to represent a low yield (but potentially high-volume) market. Special Interest groups are considered to represent a related source of demand.
<b>Corporate</b>	With the recent return of economic growth, the private sector is once again considering interesting opportunities through which it can engage with its staff and stakeholders. On occasion, corporates may be looking for "something different" rather than the conventional business meeting room offered by hotels. The DMVC should be able to meet the requirements of this cohort. It is not envisaged that activity in this customer cohort will be high volume or large-scale in terms of any individual event. The DMVC is not designed to serve as a major conference venue. Rather the expectation is that the DMVC could service corporate groups of 15-30 people for anything from conventional business meetings, training days, strategy days, and employee reward events (potentially drawing upon the natural heritage of the Dublin Mountains location).

<sup>9</sup> The United Nations World Tourism Organisation (UNWTO) defines tourism as "the activities of persons travelling to and staying outside their usual environment for not more than one consecutive year, for leisure, business, and other purposes".

### 4.3 Operating Revenues and Costs (Assumptions)

A number of assumptions have been made to model the operational and financial performance of the DMVC. These are set out in Table 4.2 below and, for the most part, are drawn from CHL's experience of trends and norms in the visitor attraction sector. In most cases the assumptions made tend to err on the side of caution.

On the basis of these assumptions a projected Profit & Loss account has been prepared for the first five years of operation. This is summarised as the "base case" in the following section, and full details are set out in Appendix 1.

**Table 4.2: Assumptions**

Type	
<b>Visitor Numbers</b>	The projected number of visitors is based on achieving incremental growth over the current demand level which has been estimated by the Dublin Mountains Partnership to be approximately 100,000 visitors per annum – 50,000 at Hellfire, 20,000 at Massey's Estate and 30,000 at Cruagh (as reported in the Stage 1 Feasibility Study). Visitor numbers are projected to grow from this level of demand to 125,000 in Year 1 of the project, rising to 225,000 by Year 5.
<b>Events</b>	Room hire for events is projected to rise from 25 in Year 1 to 70 by Year 5, with an average attendance of 25 persons. Room hire is priced at €200 in Year 1, with an average charge for service (food & beverage) of €10 per person.
<b>Shop sales</b>	Based on an average spend of €3.00 per visitor, including VAT. This is about the average for visitor attractions, and is appropriate to the content of the Centre and extent of retail that would be offered. A high proportion of visitors (60%) are assumed to make a purchase, in most cases for confectionary, soft drinks etc.
<b>Restaurant</b>	It is projected that 40% of visitors will visit the restaurant, with an average food transaction value of €8.50, including VAT. This value is a weighted average of €6 for coffee/tea and a cake/pastry (55% of customers), €10 for a light meal of soup, sandwich and water/soft drink (30% of customers), and €15 for a hot lunch (15% of customers).
<b>Bar</b>	It is projected that 15% of visitors will make a purchase from the restaurant bar at an average transaction value of €6, including VAT.
<b>Exhibition</b>	It is projected that 20% of visitors will buy a ticket to the exhibition at an average price of €3.50, including VAT.
<b>VAT</b>	It is assumed that the operating entity will be registered for VAT, which is charged at 9% on exhibition tickets and restaurant food, and 23% on all other sales.

**Table 4.2: Assumptions, cont'd**

Type	
<b>Inflation</b>	Included at an average rate of 2% per annum on operating expenses and revenues, except exhibition tickets and room hire where price increases are introduced at two-yearly intervals (see Appendix 1, Table A1.2). Staff wages and salaries are increased at 2.5% per annum to reflect rising competition for labour.
<b>Gross margins</b>	Assumed to be 65% on food and beverage sales, 50% on shop sales and 97% on admissions. [The 3% direct cost of admissions covers ticket printing, free guide/information leaflets, credit and debit card merchant charges etc.]
<b>Staffing</b>	Staffing numbers are presented in the staff schedule in Appendix 1, Table A1.4. Wages and salaries are set at prevailing rates for the sector.
<b>Professional fees</b>	Allowance for auditing/accountancy and other professional services.
<b>Marketing</b>	The very modest budget provides for a limited range of marketing and sales activities, with digital marketing being the primary activity. It is assumed that a degree of marketing support will be provided by other stakeholders, including SDCC and Coillte.
<b>Other operating costs</b>	Energy, insurance and other overheads are estimates based on the scale and type of activity. Cleaning budget is provided for specialist cleaning services; routine daily cleaning will be undertaken by staff.
<b>Depreciation</b>	The projections are operational only and do not include a provision for depreciation – it is assumed that the capital cost of the project will be funded by public funds/grants that will be amortized at the same rates as the assets are depreciated. An operator coming on site may well invest in operating equipment and will depreciate this in their own accounts.

#### 4.4 Projected Financial Performance

Table 4.3 overleaf presents the projected financial performance at the DMVC across the first five years of its operations. This is the base case with the key performance indicator presented in the form of EBITDA – Earnings before Interest, Tax, Depreciation, and Amortisation.

**Table 4.3: Summary of Projected Operating Results (€)**

	Year 1	Year 2	Year 3	Year 4	Year 5
Admissions*	125,000	150,000	175,000	200,000	225,000
Revenue	754,373	931,070	1,130,924	1,324,578	1,549,015
Cost of sales	264,481	326,553	391,762	459,707	531,614
Gross profit	489,892	604,517	739,162	864,871	1,017,401
Total expenditure	708,445	732,200	757,331	782,601	809,591
EBITDA	-218,553	-127,682	-18,169	82,270	207,809

The projections in Table 4.3 present a negative EBITDA in the first three years of operation (albeit a significantly reduced negative outcome in Year 3), followed by a stronger positive performance in each of the subsequent two years<sup>10</sup>. This reflects the start-up nature of the operation, and the positive financial impact of growing visitor numbers in the latter three years. The projections assume a steady annual increase in visitation of 25,000 people, but it cannot be assumed that this annual increase will continue indefinitely. In conventional business “product life cycle” modelling, it is usually assumed that demand will level out or “plateau” at a certain point before moving into a period of decline. Typically the response to the anticipated advent of decline will be a product “refresh”, or some similar innovation to re-engineer the value proposition offered to the consumer. Such refreshment and renewal will be required at the DMVC over time.

The position outlined in Table 4.3 above points to a potentially strong operating performance (after the first three years), although it must be noted that this result is before interest, depreciation, and amortisation. As noted at the outset, the interest charge may be overlooked as it is considered that the project is not required to remunerate the capital invested. Therefore, the omission of the interest charge in the EBITDA calculation does not compromise any interpretation of the DMVA performance. Equally, as depreciation and grant amortisation are essentially matters for South Dublin County Council as the owner of the facility, and will presumably be dealt with in its accounts, these will not be addressed in the accounts of an out-sourced private operator (should South Dublin County Council decide to appoint such an operator). In that sense then, they are not relevant to an assessment of the internal operational financial performance of the DMVC.

<sup>10</sup> Full details of working are attached as Appendix 1.

Two factors in particular are key to this projected financial outcome, and consequently will need to be monitored and managed with particular care. These are:

- 1) The outcome in Table 4.3 is predicated on a consistent annual growth in visitor numbers of 25,000 over the first five years of operation. This outcome must be the principal and consistent focus of the marketing and sales programme at the DMVC over the first five years of operation. This would imply a sales performance that grows new visitor numbers from zero to 125,000 over a five year period. It is noted that this is on a par with Airfield Estate in Dundrum which reported visitor numbers of 116,000 in 2015.
- 2) The principal revenue generating engine on-site is the restaurant. Revenue and cost management must therefore be a primary concern. If the restaurant fails to deliver the financial performance set out in the base case, then the preferred self-funded operating model could be compromised.

Forecasting financial performance and outcomes carries with it an inherent level of uncertainty. In practice it is essential that key variables – and the relationships between these variables – are identified and managed carefully. The following observations are offered on key variables.

- The estimated 100,000 existing users of local amenity are critical to the success of the DMVC – they represent a potential and immediate customer base of 40,000.
- The assumed annual increase of 25,000 visitors is a key driver of financial performance at the DMVC.
- The assumed visitor conversion rates for the restaurant (40% and 15%) are critical. and performance in this respect must be monitored carefully. This is a key performance indicator (KPI) for the operation of the restaurant and the DMVC as a whole.
- The determinant in delivering these variables will be the implementation of an effective and targeted sales and marketing campaign.

#### **4.5 Sensitivity Analysis**

The impact on operating performance of attracting visitor numbers either 20% higher or 20% lower than the base case is illustrated in Table 4.4. As the figures demonstrate, the impact is considerable. If numbers rise 20% above the base case, and other assumptions on market penetration, revenues and costs hold, the projected performance of the centre



is much improved. It almost reaches breakeven in year 2 and the EBITDA rises to nearly €400,000 in year 5. The opposite occurs if numbers are 20% below the base case projection, with very substantial losses projected be incurred over the first three years of operation, and a very modest profit being achieved in year 5.

**Table 4.4: Sensitivity Analysis**

		Year 1	Year 2	Year 3	Year 4	Year 5
<b>Visitors +20%</b>	Numbers	150,000	180,000	210,000	240,000	270,000
	EBITDA (€000s)	-128.4	-17.0	116.9	240.1	393.2
<b>Visitors -20%</b>	Numbers	100,000	120,000	140,000	160,000	180,000
	EBITDA (€000s)	-308.7	-238.3	-153.2	-75.6	22.2

Note: see Appendix 1, Table A1.5 for further details.

This pattern is typical of visitor attractions. Operating costs, including wages and salaries, do not vary pro rata with visitor numbers. Once the breakeven point has been passed, the bulk of incremental revenues flow straight through to the bottom line. On the other hand, when attractions fail to reach breakeven, the level of losses accelerate very rapidly as operating costs cannot be adjusted rapidly. In fact, most sites have a minimum level of staffing and operating costs below which they cannot function.

#### 4.6 Risk Factors

The cautious nature of some of the assumptions underlying this analysis offer the project some degree of insulation against risk. However a level of risk is inherent in any new project. In this case the following risks can be identified:

- **Risk that existing users of local amenity show no interest in the DMVC:** This has been referenced above and has been identified as a particular risk for the effective financial performance of the DMVC.
- **Risk that the marketing and sales campaign for the DMVC fails to deliver:** This is a key risk and, if it materialised, could result in a failure to reach the annual 25,000 visitor growth target.
- **Domestic consumer demand and confidence:** Consumer confidence in Ireland is strengthening again after the recent period of economic downturn. However this confidence remains fragile and is susceptible to any adverse economic conditions.

- **Consumer confidence in key source markets:** In addition to domestic economic conditions, the tourism industry is vulnerable to consumer confidence and economic conditions in its four most important source markets, Great Britain, France, Germany, and North America.
- **Brexit:** is an example of an unexpected development which can cause uncertainty for a period of years. In the immediate case of the UK, this uncertainty relates to how British consumers see the aftermath of their exit from the EU, and how confident they might be in relation to travelling outside the UK. Currency fluctuation would add to this sense of uncertainty. Tourism statistics for the first 5 months of 2017 show a drop of almost 7% in the number of trips to Ireland from Britain.
- **Marketing Impacts:** Fáilte Ireland has specifically identified the Dublin Mountains (as presented in the *Dublin – Breath of Fresh Air* proposition) as a key part of its message to consumers, and particularly overseas consumers. It remains to be seen if this message will find traction with consumers over the next few years.

Whilst acknowledging these risks, it remains the case that the DMVC project has one attribute that is not always present in new ventures. The Dublin Mountains are a long-established and well-regarded recreational asset at the edge of Dublin city. Generations of people have come to the mountains and enjoyed spending time in this natural heritage environment. It is unlikely these habits will change. The greater challenge remains in ensuring that potential overseas visitors can be similarly brought to understand what the Dublin Mountains have to offer.

## 5. ORGANISATION AND MANAGEMENT

### 5.1 Organisation

It is understood that the preferred organisational arrangement for South Dublin County Council is that the DMVC should be operated on a self-financing basis. In order to support such an outcome, it is considered that the organisation and management of the centre should be outsourced to a private operator with experience in managing such facilities, and with a proven track record in sales and marketing. This would be best set up under a ten year lease/rental arrangement. It is understood that it is the intention of SDCC to develop and construct the DMVC itself.

### 5.2 Management & Staffing

The staffing arrangements at the centre are attached in Appendix 2. This sets out a staff complement of 22 people (including seasonal staff) who will be principally involved in the reception, retail, information, and catering services to be provided on-site.

### 5.3 Direct Management or Outsourcing

It is generally preferable to out-source the operation of a facility such as the DMVC to a private operator with commercial experience in the leisure/tourism sector. Typically such an arrangement will be implemented through a public call for expressions of interest, seeking a partner to operate the DMVC on the basis of arrangements such as those described below:

- 1) **Contract Management:** An arrangement is reached whereby the local authority agrees to make an annual payment to the preferred bidder in order to have the required services delivered on site. In addition to this annual payment, and to incentivise appropriate commercial behaviour on the part of the preferred bidder, the local authority may also establish a profit share arrangement (above a defined profit level), after which the operator is entitled to a defined share of the profits achieved. This type of arrangement however is unlikely to suit SDCC as it locks the Council into making an annual payment to a service provider for operating the site. This in turn implies that the chosen operator considers the opportunity presented by the Council in the expression of interest call as inherently unprofitable (or only marginally profitable). Hence the required annual payment to insulate the operator from the risk of a commercial loss. This would not represent a cost-neutral outcome for SDCC.

- 2) **Operator Lease:** If the outcome of the negotiation is that both parties recognise that the opportunity offered at the site in question is a demonstrably profitable one, the local authority may decide to lease the premises to a suitable operator for a defined period of time (at prevailing market rates). From the perspective of SDCC, this would be a very favourable outcome. However, it is unlikely to arise immediately in the case of the proposed Visitor Centre as it is an untested venture and as the terms of any planning permission could constrain the extent to which commercial activity is permitted on-site.
  
- 3) **Licence with Profit Share:** If the potential for commercial activity is considered by a preferred bidder to be either constrained or unproven (or both), then a likely outcome could be that the operator is invited to come on site at a token/minimum rent, and is incentivised thereby to pursue profitable opportunities in service provision, unencumbered by the fixed cost of a large annual rent. Under such circumstances, the Council could introduce a provision stating that, should profits exceed a certain defined level, then the Council will be entitled to benefit from a profit share arrangement at that point. This arrangement would be cost-neutral from the Council's point of view, with the added benefit of a potential profit share, should the commercial opportunity prove lucrative for the operator

The projected financial performance presented in Section 4 above suggests that the centre could be operated on a self-financing basis, although the first three years of operation are projected to return a negative financial performance. In summary therefore, the following points are offered in relation to the organisation and management of the DMVC.

- The DMVC should be out-sourced to a private operator through a public call for expressions of interest inviting parties to set out their proposals for the operation of the centre.
  
- The Council should expect to establish a ten year operational contract based on an annual lease/rent to be paid by the operator.
  
- An essential feature of the contract should be a stepped profit share arrangement whereby the Council would be entitled to a share of any profit earned over and above an agreed level. This share should increase on an incremental basis if and when profits arise/increase. Failure to secure such an arrangement would allow the possibility of an inappropriate wealth transfer from the taxpayer/ratepayer to a private

operator who has made no economic contribution to the capital development costs of the facility.

- The Council will need to consider how the projected negative trading outcome in Years 1-3 can be addressed, so as to facilitate an operator to recover these start-up losses over an appropriate time span. In practice this will be a matter to be negotiated between the Council and prospective operators at the award of contract stage.

## 6. SUMMARY AND CONCLUSION

The primary purpose of the DMVC is to offer the visitor an improved experience in relation to a proposed 26 hectare development site in the area of Massey's Wood, Montpelier Hill, and the Hellfire Club. This improved experience is based on investment in signage, information, trail development, heritage, archaeology and story-telling. The centre will also serve as a focal point for information and orientation for those wishing to explore the wider Dublin Mountains. It is expected that the DMVC will facilitate a more orderly and regulated use of the area.

The development of the DMVC was presented as an element of the South Dublin Tourism Strategy (2015), and it aligns well with one of Fáilte Ireland's three national tourism propositions: *"Dublin – a Breath of Fresh Air"*. This is designed to promote Dublin's attractions outside the immediate city centre area to international visitors taking a short break in the city.

The context therefore for the development of the DMVC is primarily a tourism one. However, it is recognised that the development should also generate significant benefits for existing users of local amenity in the Dublin Mountains.

The projected financial performance presented in Section 4 suggests that the DMVC could operate on a self-financing basis, albeit it is expected to return a negative financial performance in the first three years of operation (start-up stage). However the projections also indicate that the centre will return a positive performance of €207,809 in Year 5, and with appropriate management and marketing, it is reasonable to assume that this positive performance could continue into the subsequent five-year period of operation.

The two key variables determining the success of the DMVC will be its capacity to secure patronage from at least 40,000 of the estimated 100,000 existing visitors to the area, and to secure a new and additional 25,000 visitors each year, over the first five years of its operation. The proposed operation of a shuttle bus service from Tallaght Stadium by SDCC could play an important part in securing this projected visitor growth.

To secure this outcome the DMVC will need to be marketed and sold in a commercial manner. Whilst it is recognised that the DMVC is not intended to operate as a commercial venture, nevertheless the imperative to operate on a self-financing basis will require commercial management. Capability in digital marketing will be a particular requirement.

It is recommended that the operation and management of the DMVC is out-sourced to a commercial operator with experience of visitor attraction management, and with a strong track record in sales and marketing.

It is noted that it is the intention of SDCC to develop and construct the DMVC itself.



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