2026

Dún Laoghaire - Rathdown Bespoke Locale Report

A new lens on the local economy

Sunstone

Dún Laoghaire-Rathdown Chamber
Advancing business together

Prepared by Sunstone Technologies Ltd.

Comissioned by The Dún Laoghaire - Rathdown County Chamber of Commerce

Photography: Dermot Byrne Photography
dermotbyrnephoto.ie

With sincere thanks to Dermot Byrne for his photography, which has helped bring the places, character and community of Dún Laoghaire–Rathdown to life throughout this report.

"This report provides something we have not had before - a clear and practical understanding of how our local economy truly operates. From a business perspective, that insight is invaluable. It allows us to see not just where we are today, but where the real opportunities for growth exist - across our town centres, our communities and our key sectors.

As President of Dún Laoghaire–Rathdown County Chamber, I am proud to support an initiative that gives our business community the clarity and confidence to plan, invest and grow."

Colin Brown

President at Dún Laoghaire-Rathdown County Chamber of Commerce

Foreword

Dún Laoghaire-Rathdown has always been a place of contrasts - a working harbour alongside a global technology cluster; historic villages alongside new town centres in Cherrywood and Dundrum; long-established communities alongside a growing and diverse international population.

This report brings those threads together, presenting a county that is more dynamic, more diverse and more ambitious than traditional metrics alone suggest - and highlighting the opportunities ahead for the businesses, communities and leaders who will shape its next chapter.

Commissioned by Dún Laoghaire-Rathdown County Chamber of Commerce and developed in partnership with Sunstone, this report marks a step change in how the Chamber understands and supports enterprise across the county. For the first time, it provides a detailed and data-driven view of business activity - including the often "invisible" local economy - alongside clear pathways for growth, investment and innovation.

By combining enterprise-level intelligence with demographic and socio-economic insight, the Chamber is better equipped to support informed decision-making and targeted economic development. From major employment hubs such as Sandyford and Cherrywood, to the high prevalence of remote and flexible working, to the strength of our international communities, a distinctive and evolving economic profile is emerging - one that presents both opportunity and responsibility.

Significant development across Cherrywood, Dundrum Central and the Woodbrook DART corridor is delivering integrated, sustainable communities supported by transport, services and amenities. This approach aligns with the Chamber's vision for balanced, future-focused growth and reinforces the county's strong international reputation.

Crucially, this report provides the Chamber with a practical framework to assess demand, identify gaps and unlock opportunity. It highlights where businesses are meeting the needs of diverse cohorts - including remote workers, single-person households, minority communities and those driving climate transition - and where further growth can be supported.

The opportunities identified reflect the Chamber's strategic priorities: scaling retrofit and renewable markets, strengthening vibrant town centres, supporting SMEs, advancing childcare as an economic enabler, and deepening cross-border collaboration through Chamber-led initiatives such as the Shared Island partnership with Bangor.

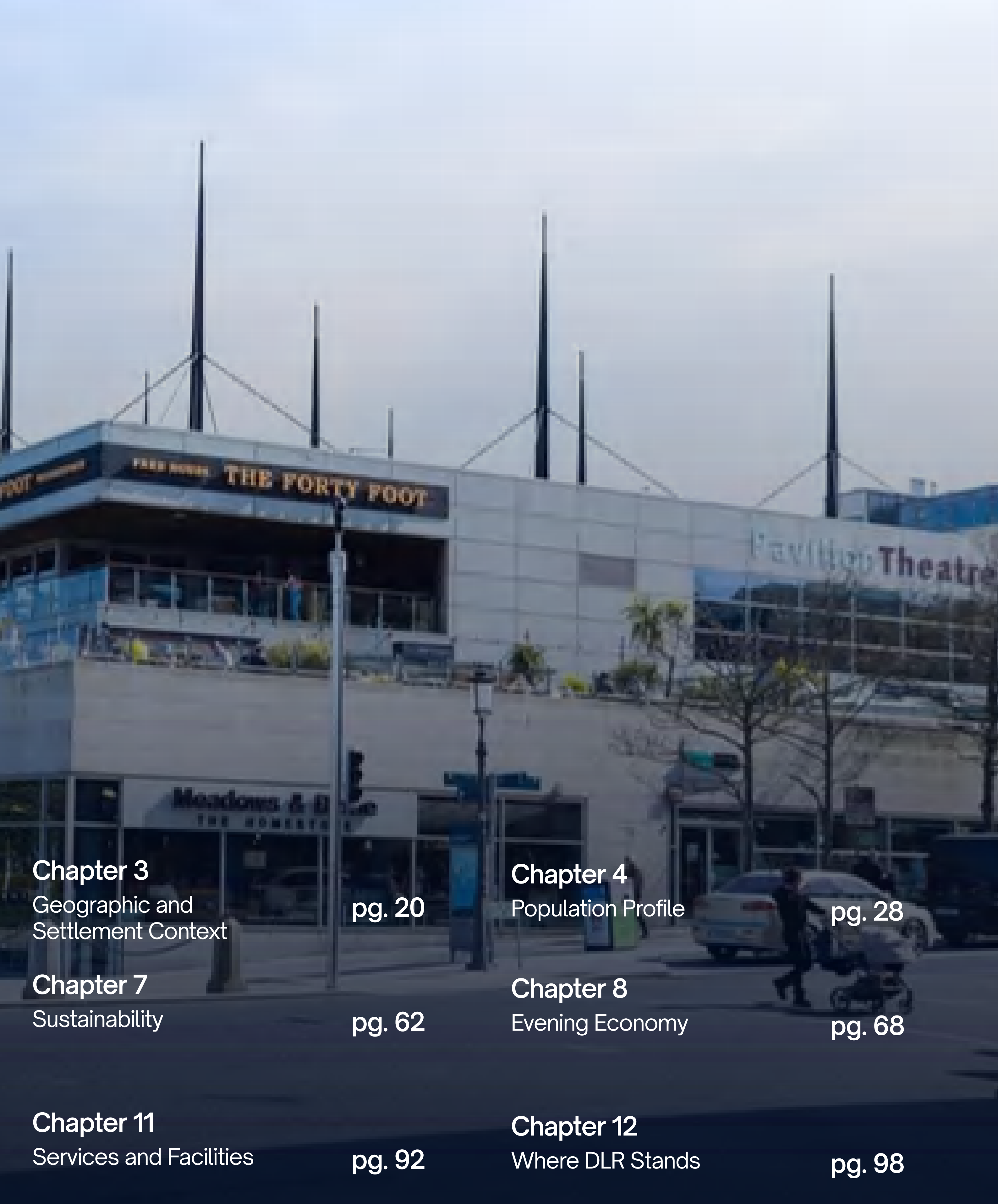
For the Chamber, this report is more than an analysis - it is a strategic tool. It will inform our advocacy, guide our engagement with members and stakeholders, and support the delivery of our Strategic Plan 2025-2030. It reinforces our role as a strong, credible voice for business and positions Dún Laoghaire-Rathdown as a leading location for enterprise, innovation and sustainable growth. This work also places Dún Laoghaire-Rathdown, and Ireland, at the forefront of applied economic intelligence at a local level, demonstrating how data can be harnessed not only to understand economic activity, but to actively shape future outcomes.

The Chamber acknowledges the expertise of Sunstone in supporting the development of this report, alongside the ongoing collaboration with Dún Laoghaire-Rathdown County Council. We are pleased to present this work to Frank Curran Chief Executive of Dún Laoghaire-Rathdown County Council and his team. Above all, this report reflects the strength, ambition and potential of the Chamber's business community.

We look forward to working with our members and partners to translate these insights into action, ensuring that Dún Laoghaire-Rathdown continues to thrive as a place to live, work and do business.

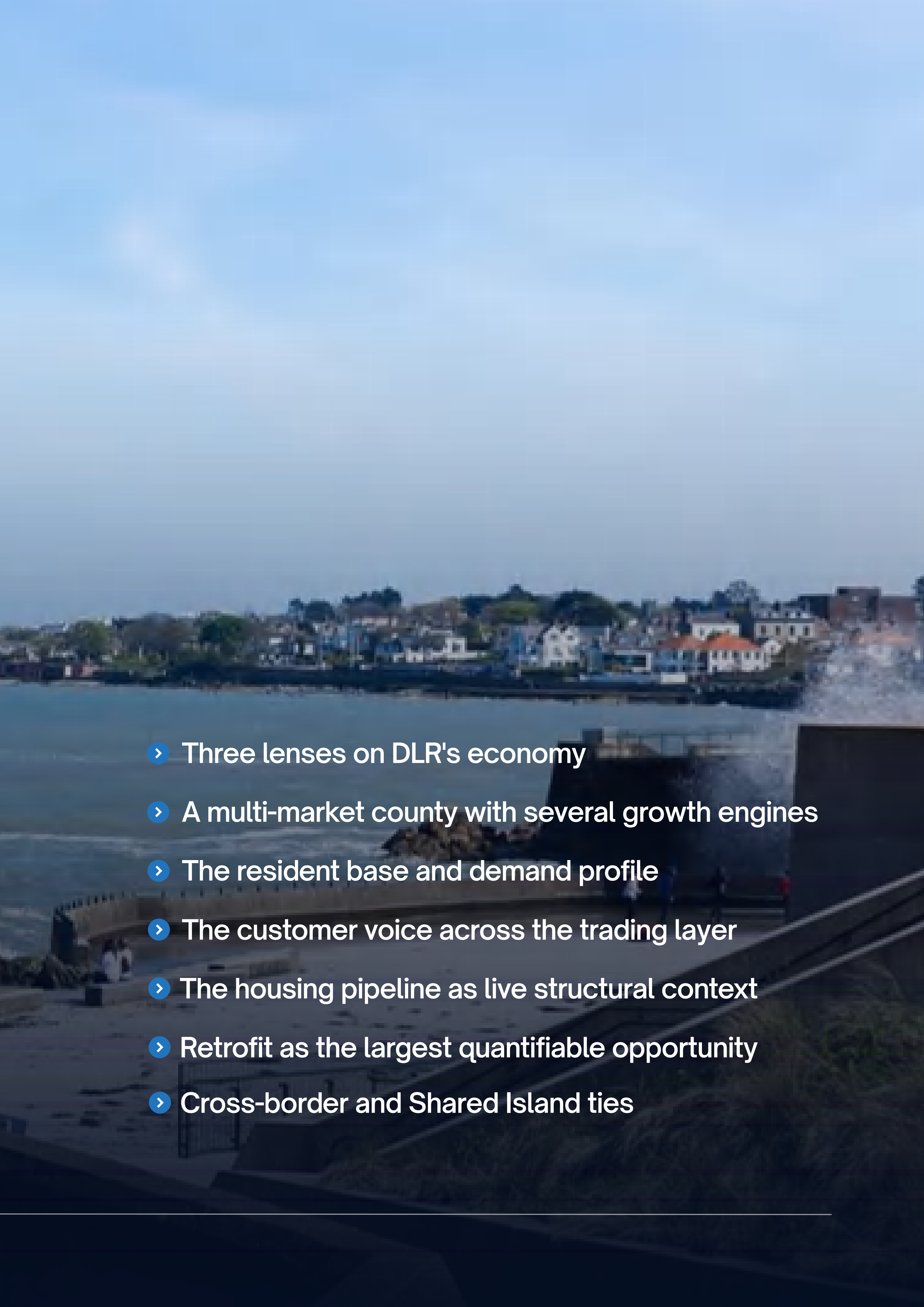
Colette O'Sullivan
CEO
Dún Laoghaire-Rathdown
County Chamber of Commerce

Table of Contents


THE FORTY FOOT
Theatre

Chapter 1

Executive Summary



- Three lenses on DLR's economy
- A multi-market county with several growth engines
- The resident base and demand profile
- The customer voice across the trading layer
- The housing pipeline as live structural context
- Retrofit as the largest quantifiable opportunity
- Cross-border and Shared Island ties

Executive Summary

This report sets out a clearer view of Dún Laoghaire-Rathdown's economy for the people already responsible for shaping it. It was commissioned by the Dún Laoghaire-Rathdown County Chamber of Commerce and built in partnership with Sunstone, drawing on three complementary lenses: the CRO register, the CSO Census 2022, and Sunstone's MAPs trading layer. Read together, they cover 17,896 registered legal entities, 12,087 visibly trading businesses across 69 electoral divisions, and 233,860 residents.

The work behind it pairs selected demand-side cohorts with its visible business response. The result is a practical evidence base for growth, support and investment decisions across the county.

DLR is a multi-market county with several connected sources of growth. The inland Sandyford-Cherrywood corridor is the largest employment cluster, and the harbour-town coast carries a wider place-economy anchored by IADT, the National Film School and the National Maritime College of Ireland. Specialist clusters run through the trading base in private medicine (anchored by Beacon Hospital and the Blackrock Clinic), creative industries around IADT, the harbour's blue economy, the diaspora economy and energy-transition supply.

The resident base is highly qualified, with 61% holding a third-level qualification, and increasingly home-based. 19,513 residents now work mainly from home, the second-largest commute mode after car drivers. 11,286 women record "looking after home or family" as their principal economic status against 879 men, a 12.8x gender gap and the single largest economic asymmetry in the resident profile. Online customer reviews add a fourth analytical read on the trading base: a median rating of 4.8 stars across 3,733 rated businesses and 355,587 review events, with a 5-star independent cohort of 456 businesses sitting inside that base.

A housing pipeline of ~13,700 future homes runs through the report as live structural context, across Cherrywood SDZ, Dundrum Central LDA and the Woodbrook DART corridor unlocked by the August 2025 station opening. The largest single quantifiable signal in the report is retrofit: 62,529 pre-2000 DLR dwellings sit against 253 visible energy-transition suppliers, a c.€2.5bn lifetime market and roughly ten times larger than every other cohort opportunity tested anywhere in the report. The digital base is past pilot stage, with 87.9% of trading businesses carrying at least one digital channel, 57.2% sitting at Intermediate or above on the sophistication ladder, and 35.1% operating across three or more channels.

The report aims to give DLR a working evidence base it can use directly for growth, support and investment decisions across the county.

What this report tells the DLR executive

DLR is a multi-market local economy with two poles: an inland Sandyford employment belt anchoring tech, healthcare and professional services, and a coastal harbour town with a real evening offer. Blackrock, Stillorgan, Dundrum and the Cabinteely-Carrickmines arc work between them. Underneath sit 17,896 registered entities, 12,087 visibly trading businesses and 233,860 residents. Eight action areas read directly off the data.

1.160 trading-SME stress sites in Beauty and Personal Care, Retail and Food and Hospitality cluster along the Sandyford employment belt, the Blackrock corridor and the Cabinteely-Carrickmines retail-park arc. The opportunity is to move from county-wide instruments to Chamber-led tools that put a named place behind every euro spent.

2. Ideal-tenant profiles. DLR's five principal centres each carry a different operating signature, from Dundrum's destination retail to Dalkey's coastal village identity. The opportunity is one centre-specific ideal-tenant brief per place, so landlord conversations and Chamber tenanting sit on documented attraction strategies.

3. Purple Flag learning loop. Dún Laoghaire town's 2026 Purple Flag accreditation is real evidence DLR can run an evening economy on partnership, with Council, Chamber, An Garda Síochána, hospitality operators and residents' groups already aligned. The opportunity is applying that partnership texture across Dundrum, Stillorgan, Blackrock and Sandyford, one centre at a time.

4. Retrofit market. 62,529 pre-2000 DLR dwellings sit against 253 visible energy-transition suppliers, a c. €2.5bn lifetime market and the largest quantifiable signal in the report. The opportunity is supplier development with the 207-firm delivery cohort, paired with street-level demand aggregation.

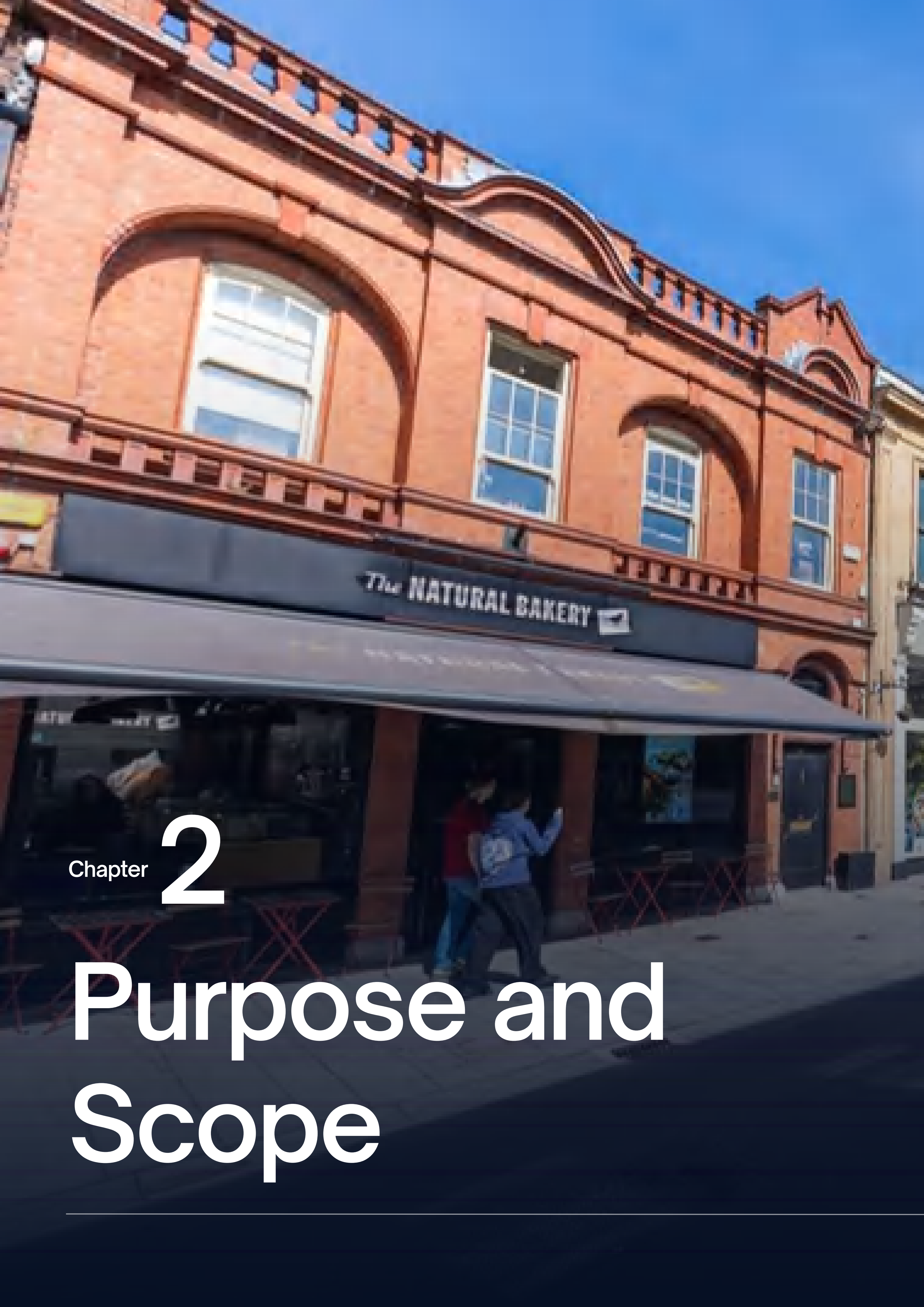
5. Infrastructure sequencing. Cherrywood lands directly on the existing employment belt, while Dundrum Central LDA and Woodbrook DART need their service base to grow with delivery. The opportunity is treating the employment belt and the housing wave as a single sequencing question across all three corridors.

6. Childcare as infrastructure. 210 visible facilities serve 15,762 children at a working ratio today, with 11,286 DLR women still recording "looking after home/family" as their principal economic status. The opportunity is sequencing childcare capacity into the Cherrywood, Dundrum Central and Woodbrook pipelines before residents arrive.

7. Digital business support. Most DLR businesses are online and over half operate above basic digital sophistication, with the headroom in Basic-tier and no-website firms across town-centre hospitality and SME services. The opportunity is a Basic-to-Intermediate support programme reaching roughly 5,000 addressable firms.

8. Multilingual legibility. Roughly a quarter of DLR residents are overseas-born, but healthcare, professional services and education sit well below retail on multilingual content. The opportunity is targeted multilingual support for those three thinnest categories.

DLR is already positioned to act. Each action area lays out a route the data has already drawn, sized to an instrument the county already has.



Chapter 2

Purpose and Scope

- Three lenses on one local economy
- A clearer view of DLR
- Two lenses, one overlap
- Geographic scope
- Live context, known limits

Three lenses on one local economy

How registered, observed and resident data combine into a practical evidence base for DLR.

The report reads DLR through three complementary lenses: CRO registrations, MAPs observed activity and CSO Census 2022.

Together they cover 17,896 registered entities, 12,087 MAPs observed businesses and 233,860 residents across 69 Electoral Divisions. The housing pipeline sits inside the report as live structural context.

Within the MAPs observed activity layer, customer reviews provide a complementary fourth analytical read, a 4.8-star median across 3,733 rated businesses and 355,587 captured review events.

Key Findings:

The purpose is to see DLR more clearly through unseen channels.
Each of the three lenses, CRO, CSO/Census, and MAPs, tells us something the others can't, and used together they give a more practical evidence base than any one source on its own.

Three Anchor Figures

Lens 1 - Paper

17,896

Registered legal entities

CRO company register. Holding companies, property vehicles, professional-service registration addresses.

Lens 2 - Street

12,087

Observed trading businesses

MAPs footprint. Websites, mapping data, LinkedIn, Eircode, reviews, sector classification.

Lens 3 - Demand

233,860

Usually-resident population

CSO Census 2022: Residents, workforce and demand context.

A clearer view of DLR

DLR works as an active local economy with several connected sources of growth, and this report is built to make those sources visible to people who already know the county well. It sets out a practical evidence base for decisions on growth, support and investment.

The analysis runs through three complementary lenses. The CRO register shows how the economy is formally structured: legal entities, including the holding companies, property vehicles and professional-service registrations that use DLR as a base. CSO Census 2022 shows who lives, works and travels through the county. The third lens is the MAPS trading layer.

What is MAPs?

MAPS stands for Market Activity Profiling System, Sunstone's proprietary machine learning engine. It reads thousands of data sources per company, including websites, digital footprints, news and market signals, and translates them into structured insight on products, services, sector positioning, values and recent activity.

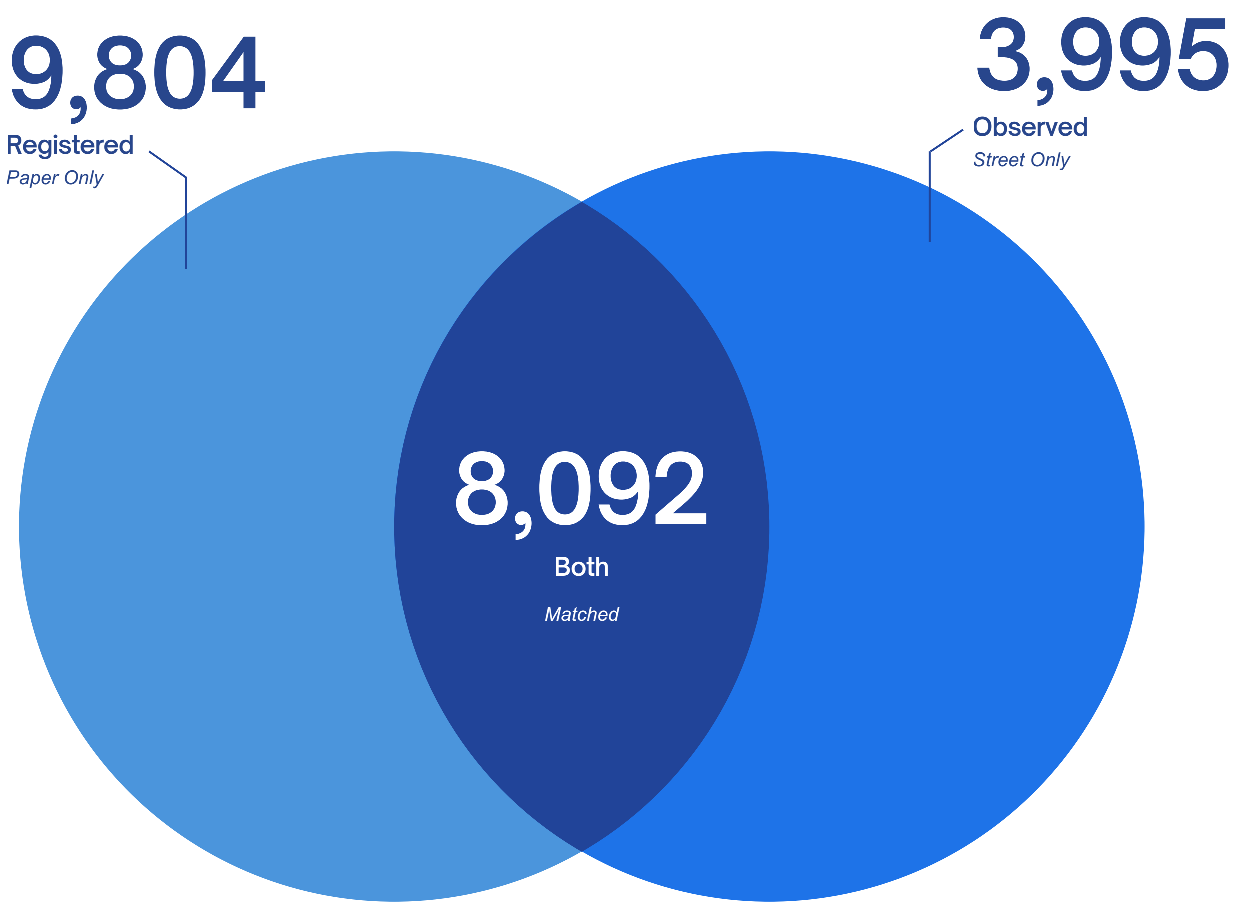
This goes well beyond traditional NACE codes, which group companies into broad, generalised categories and miss the nuance of how modern businesses actually trade.

Two lenses, one overlap of 8,092

The registered and observed views overlap, but they are not the same. Each captures things the other misses by design.

Three scope figures anchor the analysis. The registered view holds 17,896 legal entities on the CRO. The Sunstone MAPs view captures 12,087 businesses with a visible operating footprint in DLR. CSO Census 2022 records a usually-resident population of 233,860. Those three numbers sit underneath the rest of the report.

The two business lenses overlap, but they aren't the same thing. Of the 12,087 businesses in MAPs, 8,092 link back to a record on the CRO. That overlap is what lets the report cross-reference legal structure against operating footprint: accounts data, sector codes and ownership on one side, and location, sub-domain, offerings and digital presence on the other. The gap on each side reflects source design rather than data error.



Of 12,087 observed businesses, 8,092 link to a CRO record.

DLR county, read through its main local economies

The report works at county level and zooms into the towns, districts and corridors that shape day-to-day economic life.

The geographic scope is DLR county, read at county level and through its main local economies.

Where the report uses spatial analysis, it works through Electoral Divisions, the small statutory areas the CSO uses for census breakdowns.

The MAPs dataset assigns businesses across 69 Electoral Divisions in DLR, giving the report a practical geography for town centres, business districts, corridors and neighbourhood service areas.

This report connects evidence across places, people and businesses.

Dún Laoghaire town is treated as a harbour town with a wider economic role.

Sandyford and Dundrum are read as part of a growing business and technology hub.

Cherrywood, Woodbrook, Shankill and the Bray corridor sit within the county's public-transport-led growth story.

69

Electoral Divisions

Each one carries at least one observed business, and together they form the spatial boundaries of the analysis.

Main Local Economies Covered:

- Dún Laoghaire town
- Dundrum
- Cherrywood
- Stillorgan
- Blackrock
- Stepaside
- Sandyford
- Shankill
- Cabinteely
- Foxrock
- Ballinteer

Live context, with known limits

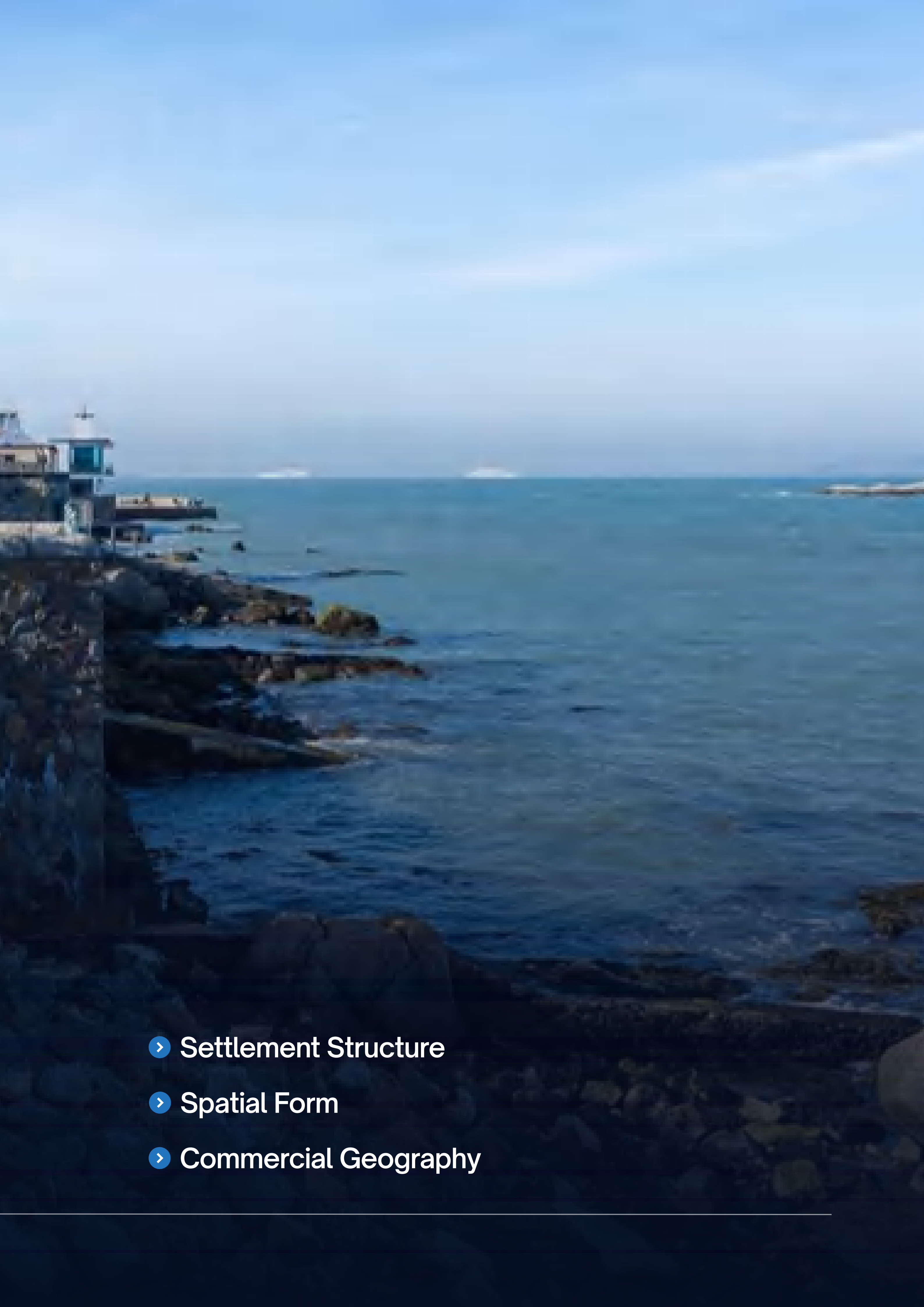
Housing pipeline runs through the report

The housing pipeline runs through this report as live structural context rather than a separate study. Cherrywood SDZ, Dundrum Central LDA and the Woodbrook-Shankill-Bray DART corridor are reshaping the future geography of demand for businesses, services and transport across the county.

That's why they recur across Sections 3, 9, 11, 12 and 13. Planned units are not delivered homes, and the report keeps that distinction explicit wherever pipeline figures appear.

Chapter 3

Geographic and Settlement Context



- Settlement Structure
- Spatial Form
- Commercial Geography

Two centres, one county

The employment cluster and the next wave of housing sit in different parts of the county. That geometry is where the opportunity lies.

DLR runs along two transport spines: the Luas Green Line through Dundrum, Sandyford and Cherrywood, and the DART along the coast through Dún Laoghaire, Dalkey and Woodbrook.

The employment is on the inland spine. The next housing wave is on the coast and at Cherrywood. Connecting them is the next phase of public-transport-led growth.

Key Findings:

DLR's geography is an asset in itself: coast, harbour, villages, business districts, transport corridors and growth lands.

Observed Businesses

Total 12,087 Residents

3,485
Sandyford / Cherrywood employment spine

3,300
Other Remaining Divisions

785
Churchtown / Clonskeagh / Goatstown

1,885
Dún Laoghaire / Dalkey coast

1,418
Blackrock / Stillorgan / Booterstown corridor

1,214
South / Shankill / Killiney

Five geographic zones, ranked by observed business count. The Sandyford / Cherrywood employment cluster sits ahead of the coast, with three connecting corridors between them.

An office cluster on the Luas, a working harbour town on the DART

The Sandyford spine and the Dún Laoghaire coast are DLR's two largest concentrations. They look completely different up close.

Sandyford Spine

Tech, healthcare and professional services lead, with construction, retail and finance close behind.

A growing business and technology hub on a Luas corridor with capacity to absorb more demand.

Beacon Hospital anchors the south end of the spine and is one of DLR's two largest single private-medicine sites; section 5 treats this as a 909-business private-medicine cluster in its own right.

Dún Laoghaire Coast

Healthcare, retail and food & hospitality lead the way. The town carries a wider economic role, with its mix of daytime services and evening trade pointing to a function that reaches well beyond its immediate catchment.

IADT (Institute of Art, Design and Technology) and the National Film School at IADT in Dún Laoghaire-Sallynoggin West anchor an education-led creative cluster running into the town centre, with Media Cube as the IADT business incubator. The harbour, the Forty Foot at Sandycove, NMCI (National Maritime College of Ireland) and the Purple Flag accreditation make the coast a place economy in its own right.

Sandyford Spine

Dundrum-Balally - 1,737 businesses

Roughly one in seven of all trading businesses in DLR sit in a single electoral division, the one covering most of the Sandyford Business District.

1,737 businesses

Dún Laoghaire Coast

Dún Laoghaire town - 1,162 businesses

Across the two central electoral divisions, rising to 1,538 with Salthill and Sandycove. A working harbour town with depth beyond its office cluster.

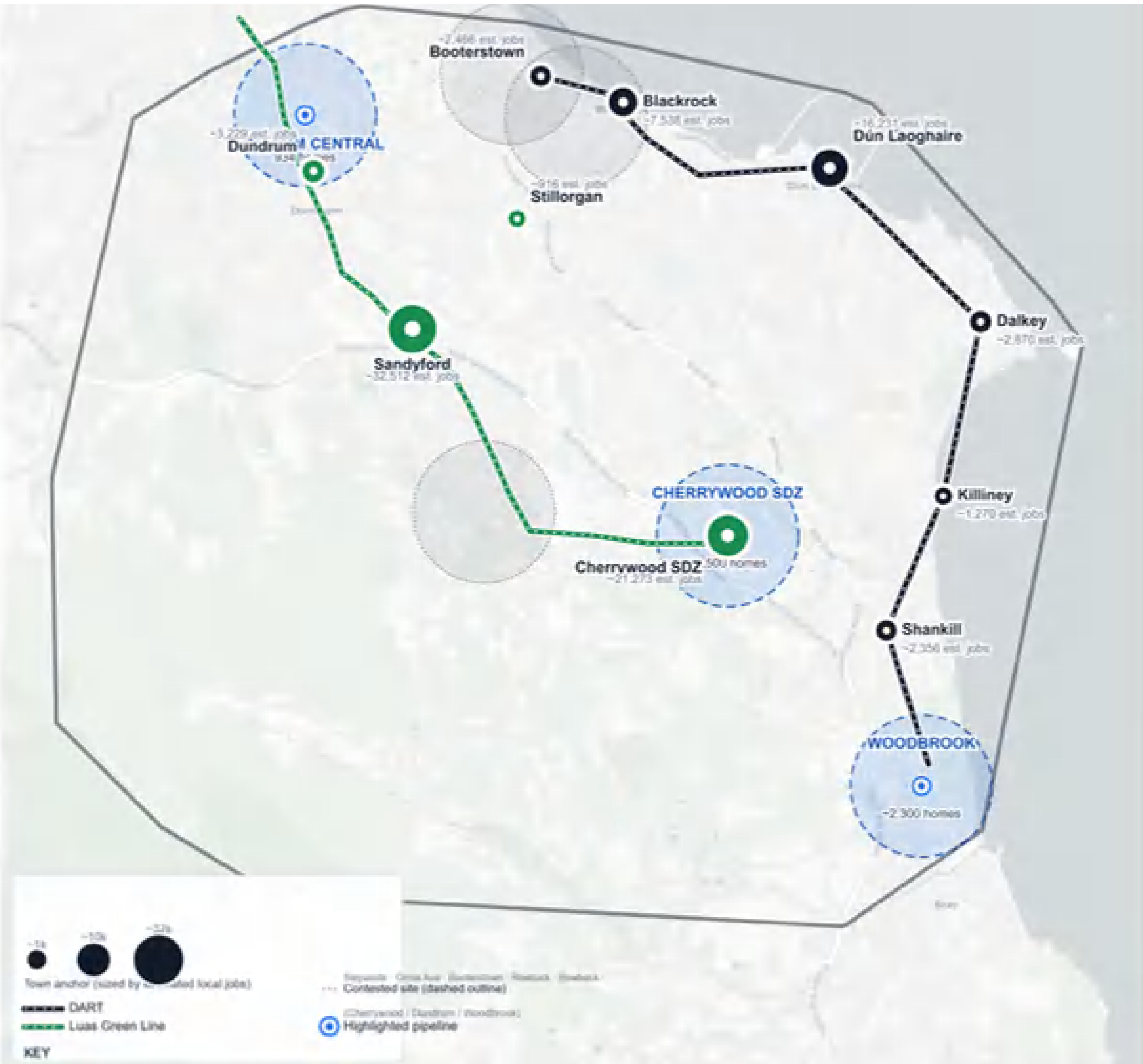
1,162 businesses

Seven principal centres, two transport lines

Dún Laoghaire is the harbour-town anchor. Dundrum has the county's largest retail centre. Blackrock, Stillorgan, Dalkey and Shankill are the village-scale centres along the coast and DART line. Sandyford Business District sits inland on the Luas Green Line. The Blackrock Clinic sits at the centre of the Blackrock village commercial cluster as one of DLR's two largest single private-medicine sites.

Where the businesses are. Where the homes are coming.

The inland Luas employment belt sits apart from the three named housing-pipeline corridors along the coast and at Cherrywood. The chance is to connect new communities with established employment centres from the start.

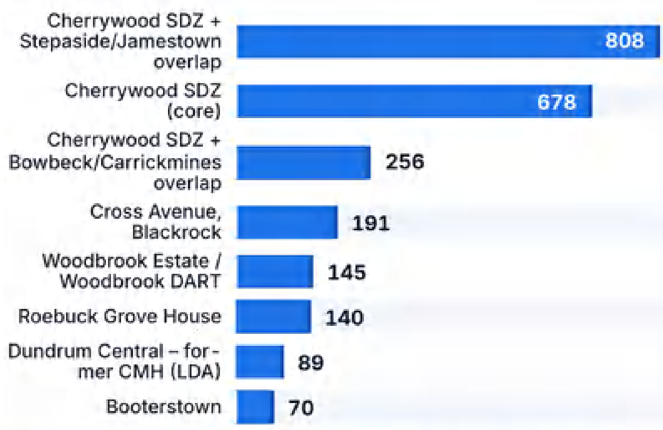


Existing activity inside the pipeline

The three named housing pipelines sit in different parts of the county and connect to different transport spines. Cherrywood SDZ runs along the M50 and Luas Green Line interchange at DLR's south end. Dundrum Central LDA sits at the heart of Dundrum's town centre, plugged into the same Luas line further north.

The Woodbrook, Shankill and Bray DART corridor follows the coastal rail line at the county's southern edge, with Woodbrook station opening in August 2025 to unlock direct DART access along the corridor. Section 9 sets out the full employer geometry behind each pipeline.

Observed Businesses — Total 2,377 observed businesses



Multi-tag rows reflect ED-level overlap between adjacent geogates and are not double-counted.

Three Named Pipeline Corridors

1 Cherrywood SDZ

~360 ha, ~10,500 homes, five Luas stops

2 Dundrum Central LDA

former CMH, 934 homes

3 Woodbrook–Shankill–Bray

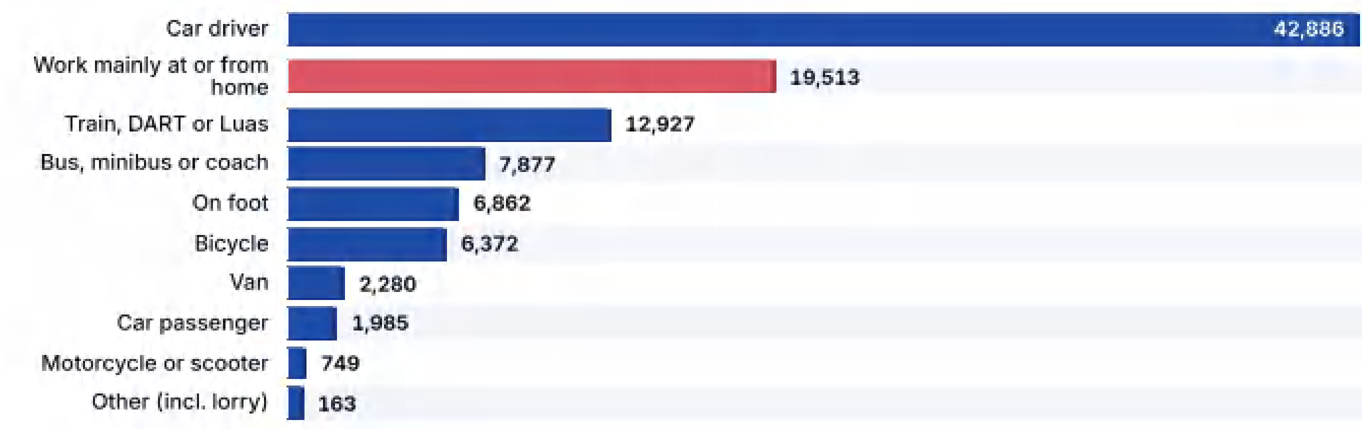
~2,300 homes, DART unlocked Aug 2025

WFH is now the second-largest mode

The commute pattern sitting on top of this geography is already shifting, and that shift matters for how the next housing wave will use the network.

DLR Resident Workers (Census 2022 Table 11; N=105,264)

Total 101,614 DLR Resident Workers (Census 2022 Table 11; N=105,264)



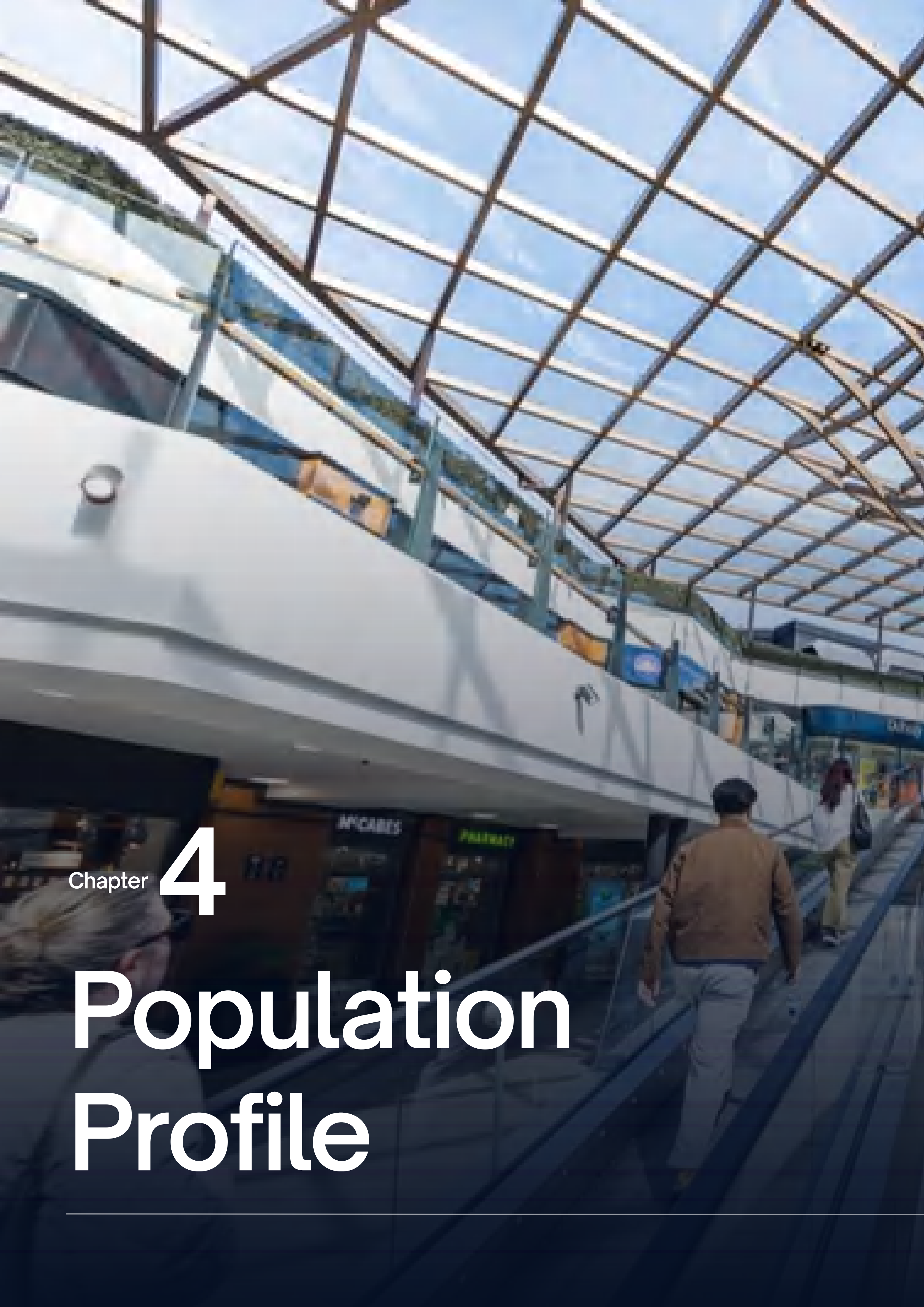
Car drivers still lead at 42,886. Working from home has moved to second at 19,513, ahead of both rail and Luas (12,927) and bus (7,877).

Active modes carry 13,234 between foot and bicycle. If this trend continues, new residents in Cherrywood, Woodbrook and Dundrum Central will not all commute to a fixed desk.

A meaningful share will work from home some or most of the week, draw on local town centres, neighbourhood services and third places during the day, and use the DART and Luas for the trips that do happen.

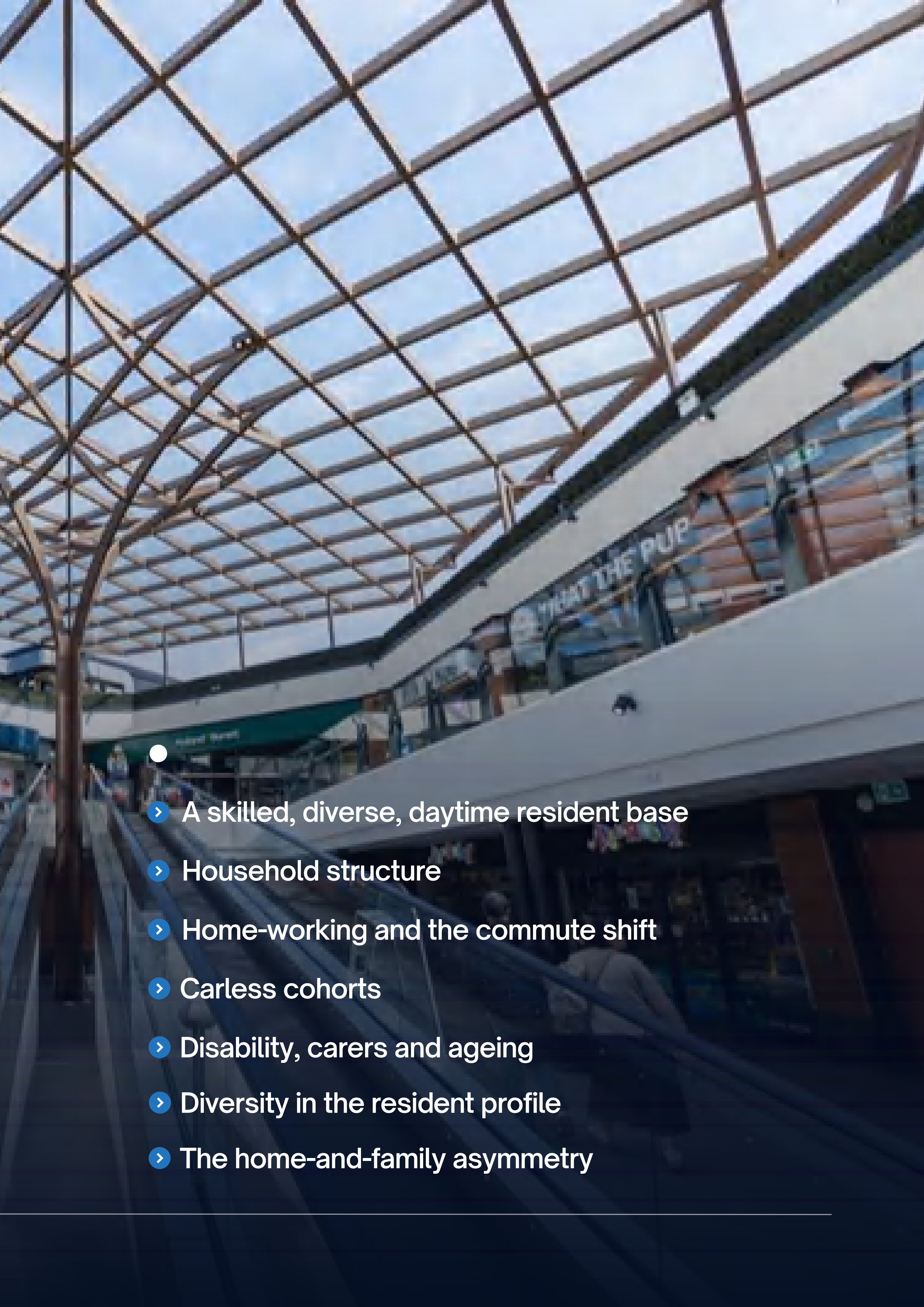
That changes what the transport network is being asked to carry, and what each town centre needs to offer.

The geography is the organising asset for supporting the next phase of DLR's development.



Chapter 4

Population Profile



- A skilled, diverse, daytime resident base
- Household structure
- Home-working and the commute shift
- Carless cohorts
- Disability, carers and ageing
- Diversity in the resident profile
- The home-and-family asymmetry

A skilled, diverse, daytime resident base

DLR's residents are highly qualified, increasingly home-based, and made up of distinct sub-groups that the rest of the report tests against.

DLR has 233,860 residents in 85,128 households. 61% of adults hold a third-level qualification and 63.5% of workers sit in managerial, professional or associate-professional roles.

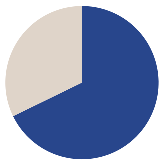
Single-person households, carless residents, workfrom-home workers, sized minority communities, the disability and carers cohort and childcare-constrained women define the demand profile.

Key Findings:

DLR's resident base is highly skilled, diverse, active, and increasingly present during the working day.

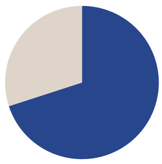
233,860

Usually-resident population



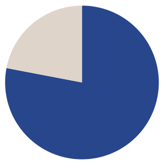
61%

of adults hold a third-level qualification



63.5%

Workers in managerial, professional or assoc-pro



22%

of households are single person

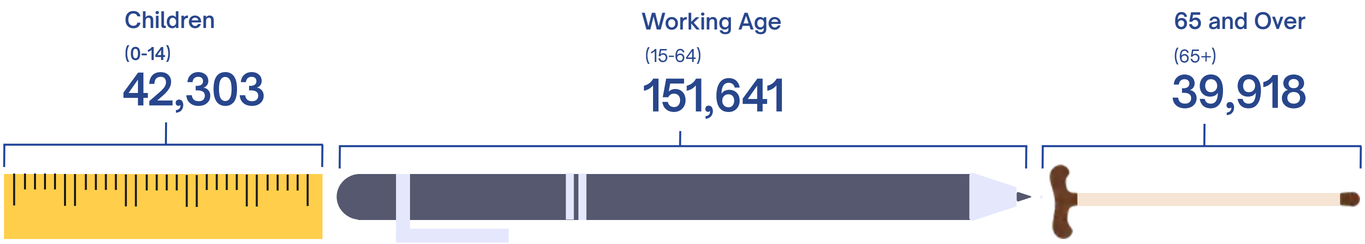
DLR's resident base is the strongest single asset tested in the rest of this report

A working-age engine

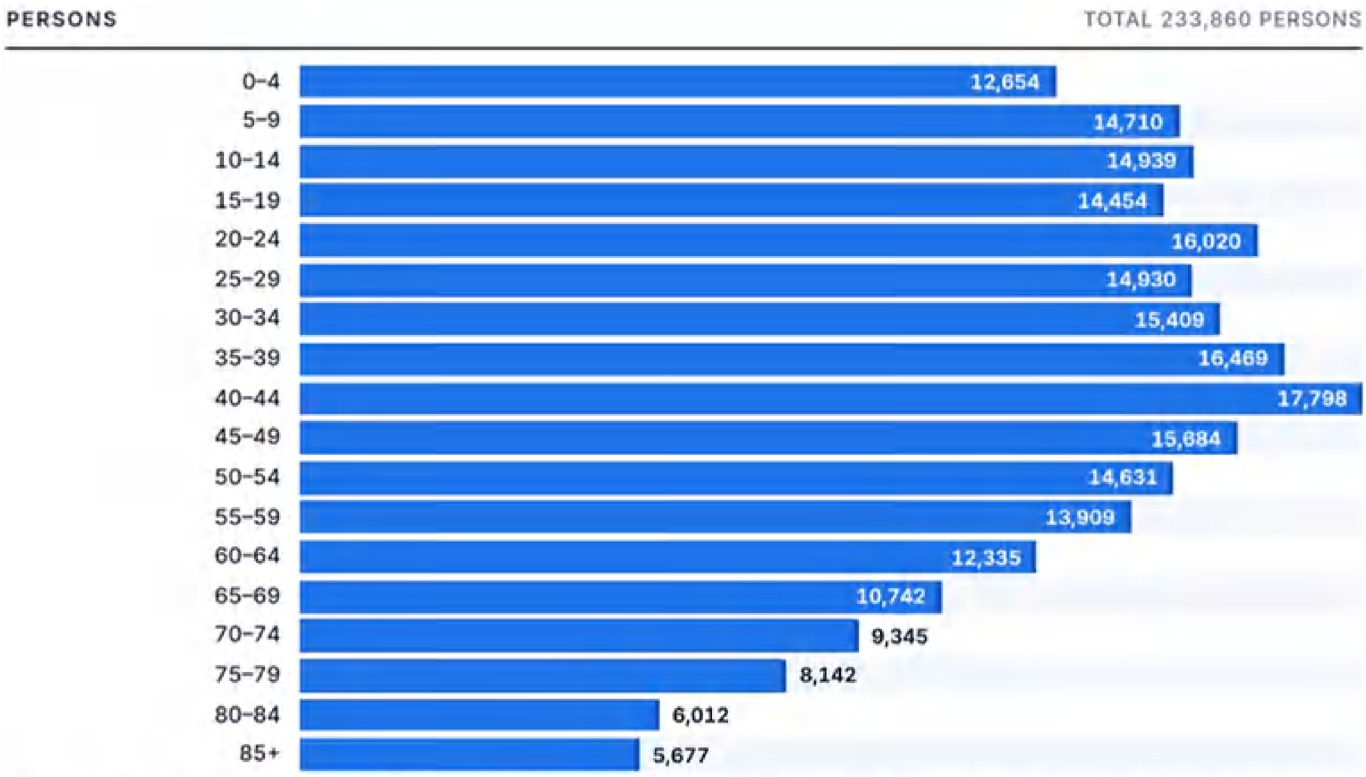
DLR is a multi-market county. 42,303 residents are under 15 and 39,918 are aged 65 or over. That mix drives demand for childcare, education, health, wellness, culture, transport, leisure, home care and day-to-day services all at once.

Residents by Age Mix

Total 233,860 Persons



Residents by age band (5 year bands)

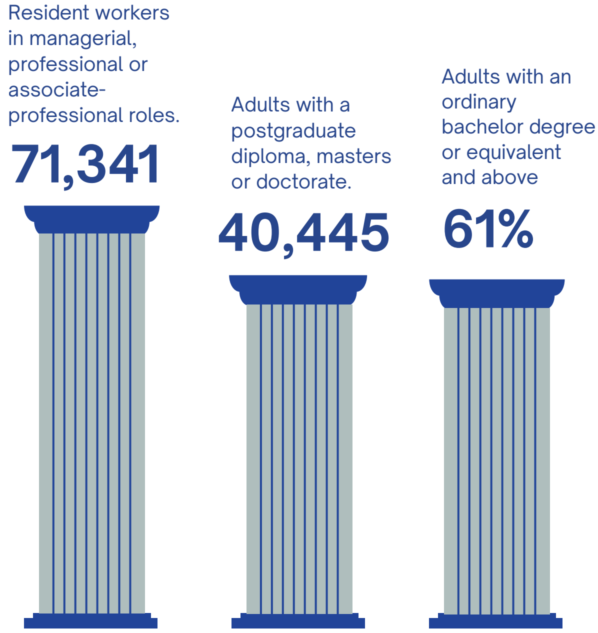


A highly qualified resident base

Of the 154,615 adults in DLR who have completed full-time education, 61% hold at least an ordinary bachelor degree or equivalent. 40,445 of them carry a postgraduate diploma, masters or doctorate, roughly a quarter of that adult base.

The occupational mix matches the qualification depth. Of the 112,375 residents with a classified occupation, 71,341 (63.5%) sit in managerial, professional or associate-professional roles, and 139,034 residents (about 59% of the population) fall inside the top two CSO social-class categories.

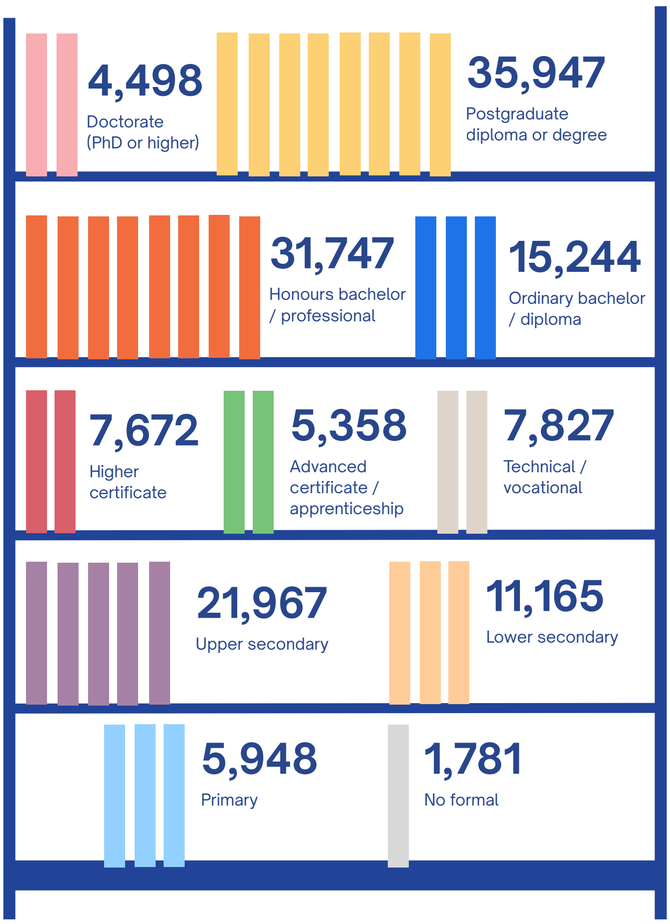
Together those numbers give DLR a deep labour pool across professional services, technology, finance, education, healthcare, research, creative work and public-sector functions.



Education Attainment

Adults whose education has ceased

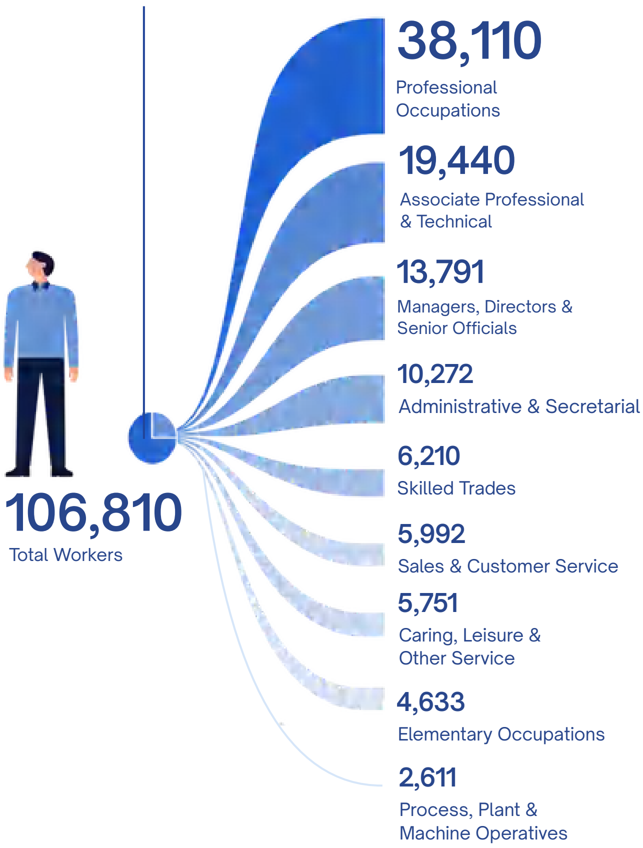
Total 154,615 Adults



Occupational Mix

Resident Workers

Total 112,375 Workers



A household structure led by small units

Third-place venues - Shared spaces people use as part of daily life beyond home and work: cafés, libraries, gyms, community centres, parks and similar venues.

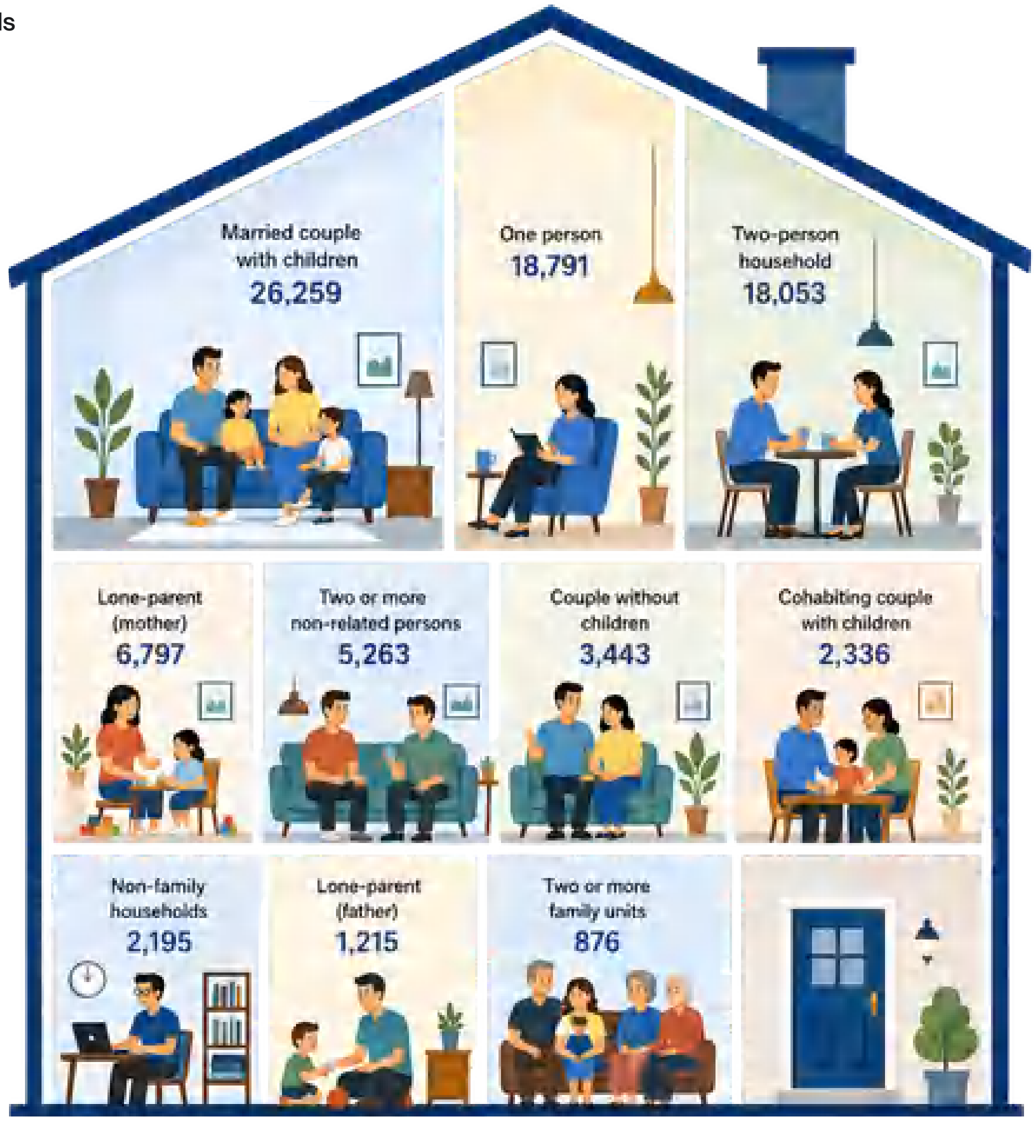
18,791 households (22% of the 85,128 total) are single-person, the largest household type after couples-with-children. That shapes the local consumer economy through smaller shopping basket sizes, a stronger pull towards food service over weekly grocery shopping, and clear demand for third-place venues like cafés, libraries, gyms and community space.

8,012 households are lone-parent, and 87% of those are mother-headed. Time, transport and childcare constraints shape how and where this group spends. Opening hours, accessibility, price points, school-adjacent services and public-transport connections all carry direct economic weight.

Private Households by structure

Household Structure

Total 85,128 Private Households



Home-working is now the second-largest commute mode

On any given working day, tens of thousands of high-skill, high-income residents are in DLR neighbourhoods instead of commuting out. That puts demand on local cafés, food retail, gyms, parcel and home services, third-place venues, reliable digital infrastructure and short-trip transport in a way the pre-2020 commuter pattern did not.

The 19,513 mainly-from-home residents, the 13,234 walking and cycling commuters and the 11,658 carless households together form what section 8 reframes as DLR's captive local-spend cohort, the structural anchor of demand whose daily economic activity stays inside the county by physical necessity.

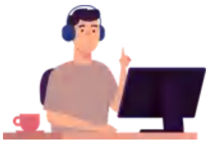
Resident workers by commute mode — Total 101,451 Resident Workers

1 Drive a car to work

42,886

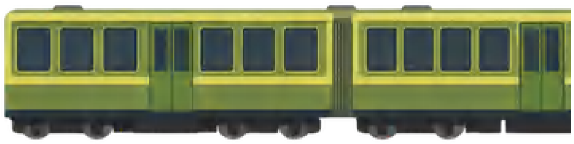
2 Work mainly at or from home

19,513



3 Take the train, DART or Luas

12,927



4 Take a bus, minibus, or coach

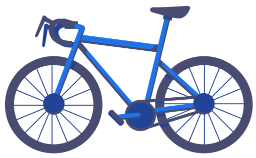
7,877

5 Walk to work

6,862

6 Cycle to work

6,372



7 Travel by van

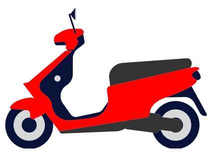
2,280

8 Travel as a car passenger

1,985

9 Travel by motorcycle or scooter

749



CSO Census 2022 Table 46: means of travel to work, DLR resident workers (excludes 3,650 'not stated'). 'Work mainly at or from home' has overtaken every public-transport and active-travel mode

Carless cohorts,

11,658 households (13.7% of the total) report no motor car. This sizeable carless base depends on DART, Luas, bus and active travel for daily access. The CSO table is county-level, so within-county distribution can't be read off it directly, though Clonskeagh-Belfield stands out elsewhere in the analysis as the genuinely rail-thin electoral division on the carless map.

Section 8 reframes this 11,658-household carless group as DLR's captive local-spend asset rather than a service-deficit one. Their daily economic activity stays inside the county by physical necessity, alongside the 19,513 mainly-from-home residents and 13,234 walking and cycling commuters covered above.

Mode Breakdown - Resident Workers

12,927
Train, Dart, or Luas

7,877
Bus, Minibus, or coach

6,862
On Foot

2,280
Bicycle

Accessibility and unpaid care

Together, these groups define a clear audience for accessible premises, transport, multilingual signage and carer-friendly service hours. They also create a defined service-infrastructure load on Sections 8 and 10 of the report.

The 49,999 long-lasting-condition cohort and 39,918 over-65 residents pair with section 5's 909-business private-medicine cluster anchored by the Beacon Hospital and the Blackrock Clinic, set inside section 10's wider service-backbone framing.

Disability Cohort

49,999

Residents reporting at least one long-lasting condition or difficulty (21.4% of the population). 22,776 male, 27,223 female.

Carers Cohort

13,610

Residents providing regular unpaid care to family or others. Female carers outnumber male carers 1.65:1.

Diversity in the resident profile

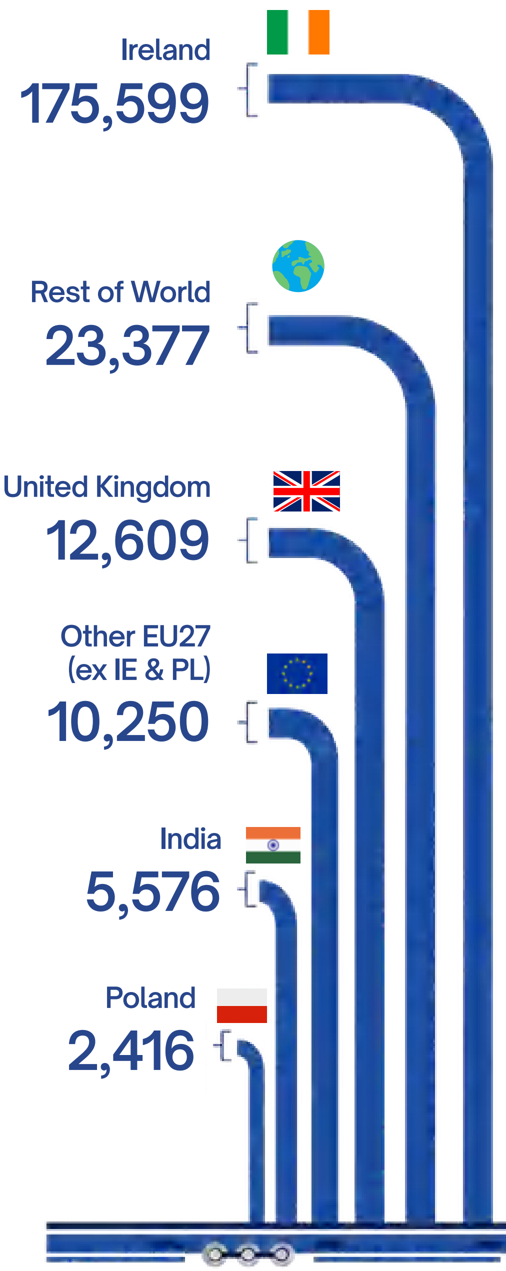
54,228 residents (24%) were born outside Ireland. The largest single overseas-born group is UK-born at 12,609.

India-born residents number 5,576, a community already large enough to support its own civic and consumer footprint. Poland-born residents number 2,416. 7,562 new residents arrived in DLR from outside Ireland in the year to Census 2022. These groups are the resident-side base for Section 5's 3,401-business visible diaspora-economy footprint, the supply-side complement to DLR's diversity profile.

Country of Birth

Residents

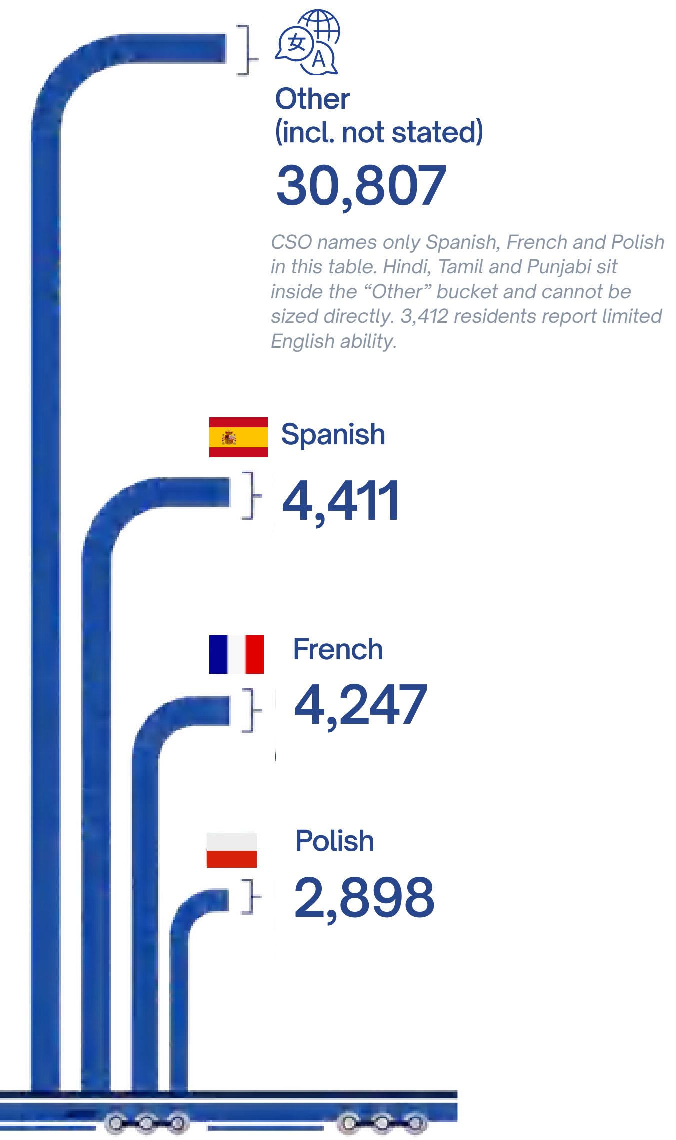
Total 229,827 Residents



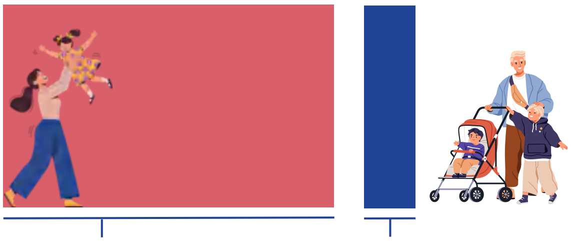
Non-English Home Language

Speakers Aged 3+

Total 42,363 Speakers Aged 3+



11,286 women, 879 men: the single largest economic asymmetry in DLR



11,286

(Reported Principal Economic Status)

Women looking after home or family

879

(Reported Principal Economic Status)

Men looking after home or family

37%

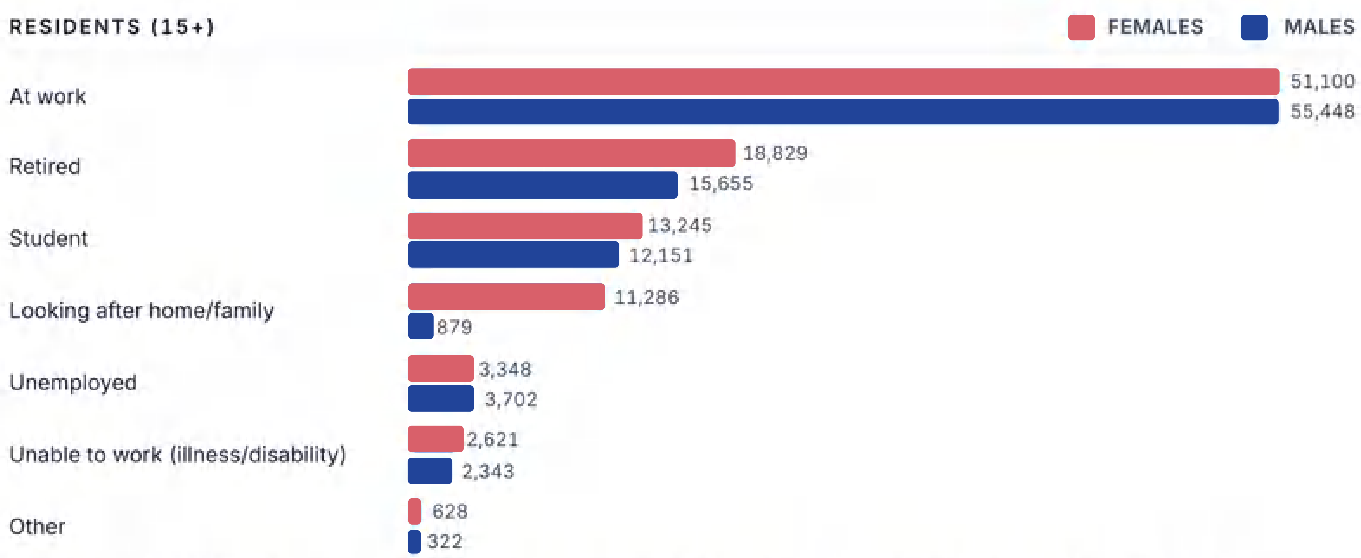
Children in some form of Childcare

(Around 37% of the under 15 population)

11,286 women in DLR report "looking after home or family" as their principal economic status, against only 879 men. That's a 12.8x gender gap, and the single largest economic asymmetry in the county's resident profile.

Of the 42,303 children under 15, 15,762 are in some form of childcare, around 37% of the under-15 population. Within that 15,762, 7,677 are aged 0-to-4 and 8,085 are aged 5-to-14, both drawing on the same 210-facility base. section 10 splits the demand into two ratios because afterschool clubs sit alongside full-day crèches in the same count.

Read together, the two figures identify childcare capacity as the lever most likely to unlock more of DLR's highly skilled female workforce into paid work or higher hours. That's why the report later treats childcare as economic infrastructure rather than as a service line.



CSO Census 2022 Table 39,principal economic status by sex. Self-reported: captures the dominant role, not all activity.

Long-term conditions, ageing and the care load

49,999 residents in DLR report a long-lasting condition, illness or disability, and 39,918 residents are aged 65 or over.

Together they shape a large and structural demand for health services, home care, accessibility-aware retail, transport assistance and day-to-day support, and they sit behind a substantial level of informal caring across households in the county. They pair with section 5's 909-business private-medicine cluster as the supply-side response, set inside section 10's wider service-backbone framing.

Chapter 5

Local Business Profile

- Business base and sector composition
- Registered view and observed activity view
- Specialist clusters
- Financial stress and trading footprint

The Local Business Base

The concentrations that define the local economy

DLR's business profile sits across several distinct concentrations. The trading base is small-firm dominant and geographically anchored on the Sandyford spine and the harbour, with a substantial private-medicine cluster, an education-led creative spine running through IADT, a visible diaspora-economy footprint and a heritage cohort of firms still trading after a century or more on the register.

Around these sit a working blue economy, an energy-transition tail and a real cross-border presence into Britain. This section sets out where each of these sits, what anchors them, and how they fit together.

Key Findings:

The composite read across CRO, CSO and MAPs surfaces five practical features of the local economy: a blue-economy cluster, an energy-transition supply side, a multilingual and minority-serving business base, SME stress signals where rate-relief work can focus, and a cross-border trading footprint into the UK. Together these define the working shape of the county economy that any growth, support or investment decision is operating inside.

DLR's two-lens business base

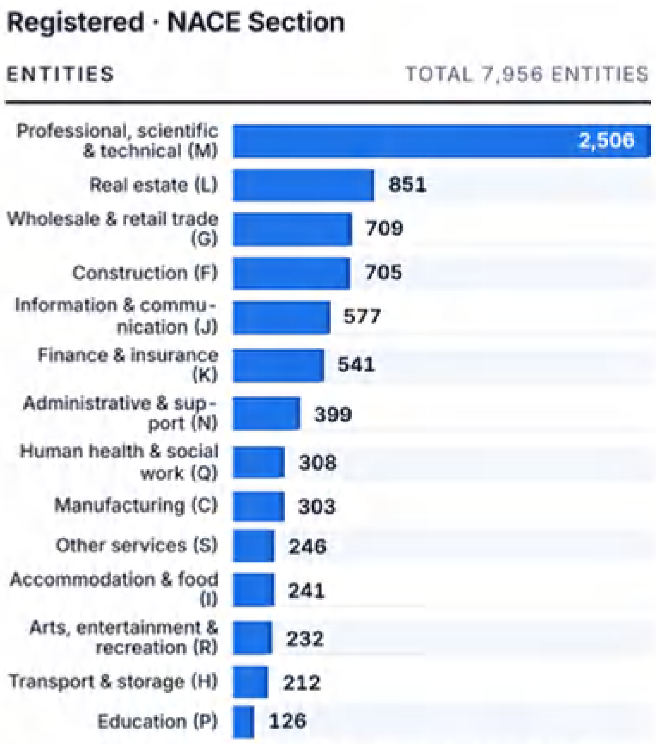
17,896	12,087	8,092
Registered (CRO) Entities	Observed (MAPs) Businesses	Observed with a registered match

Different lenses, different sector shapes

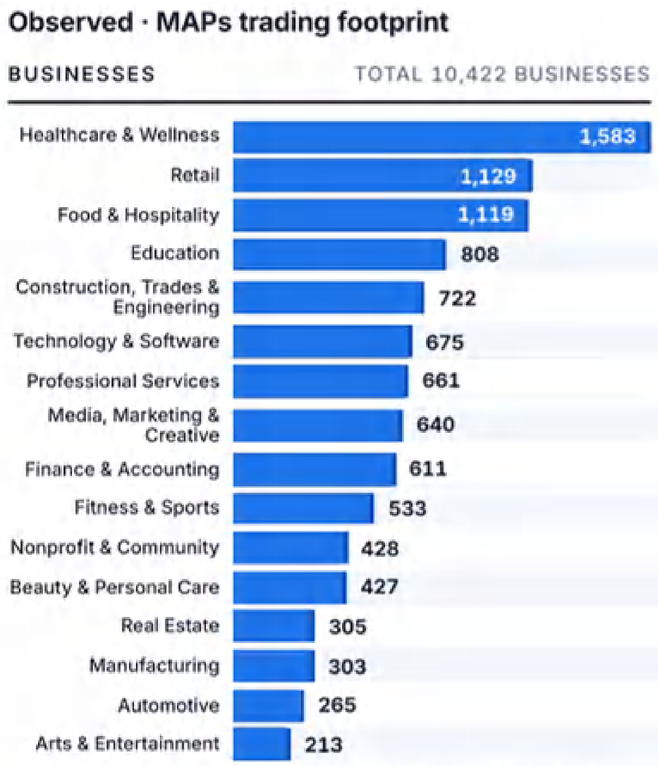
The sector leaders differ for the same reason the totals differ.

The registered view is led by Professional, Scientific and Technical activities at 2,506 entities, with Real Estate second at 851. That ordering reflects the formal corporate shape of the economy: consulting and professional-services firms registered to the county, alongside the property-holding and investment vehicles that use DLR as a registration address.

The observed activity view is led by Healthcare and Wellness at 1,583 trading businesses. These are the GPs, allied health, mental health and wellness providers people actually walk into.



Professional, scientific and technical activities lead the registered view at 2,506 entities, with real estate second at 851.



Healthcare and wellness leads the observed footprint at 1,583 trading businesses people actually walk into.

Taken together, the two views describe both the legal-administrative footprint and the operating economy that residents, workers, visitors and suppliers encounter in practice.

Small-firm heavy and recent

A young register, mostly micro firms, sharpened by a turnover signal that now covers 43% of the base.

The economy is small-firm heavy and recent. Among the 4,613 registered entities with a known headcount, 79% are micro firms with one to nine employees, alongside 717 small, 176 medium and 75 large companies. Employee data is missing for the other three-quarters of the register, which is normal for Irish private companies filing abridged accounts.

The pool that does report skews firmly to the small end. The register is also young: 8,062 of 17,896 entities, 45%, were incorporated in 2020 or later. That points to an active formation environment. It also includes the new SPVs and holding vehicles that flow through the register alongside new trading firms.

The implied-turnover layer sharpens the small-firm reading. It's a Sunstone model that approximates annualised turnover for companies filing abridged accounts by combining receivables, debtor days and other balance-sheet information. 7,701 entities (43% of the register) now carry a usable turnover signal: 1,387 from reported P&L revenue, and 6,314 inferred through the model.

Implied figures are order-of-magnitude indicators, not audited revenue, and should be read that way. Across the cohort with a signal, total turnover sums to roughly €116 billion. That is the legal administrative footprint of trading activity attached to DLR-registered entities, rather than local shopfront turnover alone. 85% of those entities have implied or reported turnover under €2 million. The bulk of the €116bn aggregate sits in the 138 entities at €50m and above, dominated by the holding-company and financial-services structures that use registered offices in DLR for legal and administrative reasons.

Strip out that long tail at the top and what remains is a thick base of small trading firms, many of them well below €500,000 in annual activity. That is the population the Chamber and the Council deal with day to day.

Recent incorporations

8,062

8,062 of 17,896 registered entities incorporated since 2020.

Micro firm share

79%

Of the 4,613 entities with a known headcount, 3,645 employ 1–9 people.

Turnover under €2m

85%

Of 7,701 entities with a usable turnover signal.

Aggregate turnover signal

€116bn

Concentrated in 138 high-turnover entities, mainly holding-company and financial-services structures.


Mercedes-Benz
South Dublin
smart


MITCHELL & SON
Wine Merchants
Tel: 01 2302301


Miss E


Rococo


64
Wine Merchants & Artisan Foods


rae feather
55

Anchored on the harbour and Sandyford

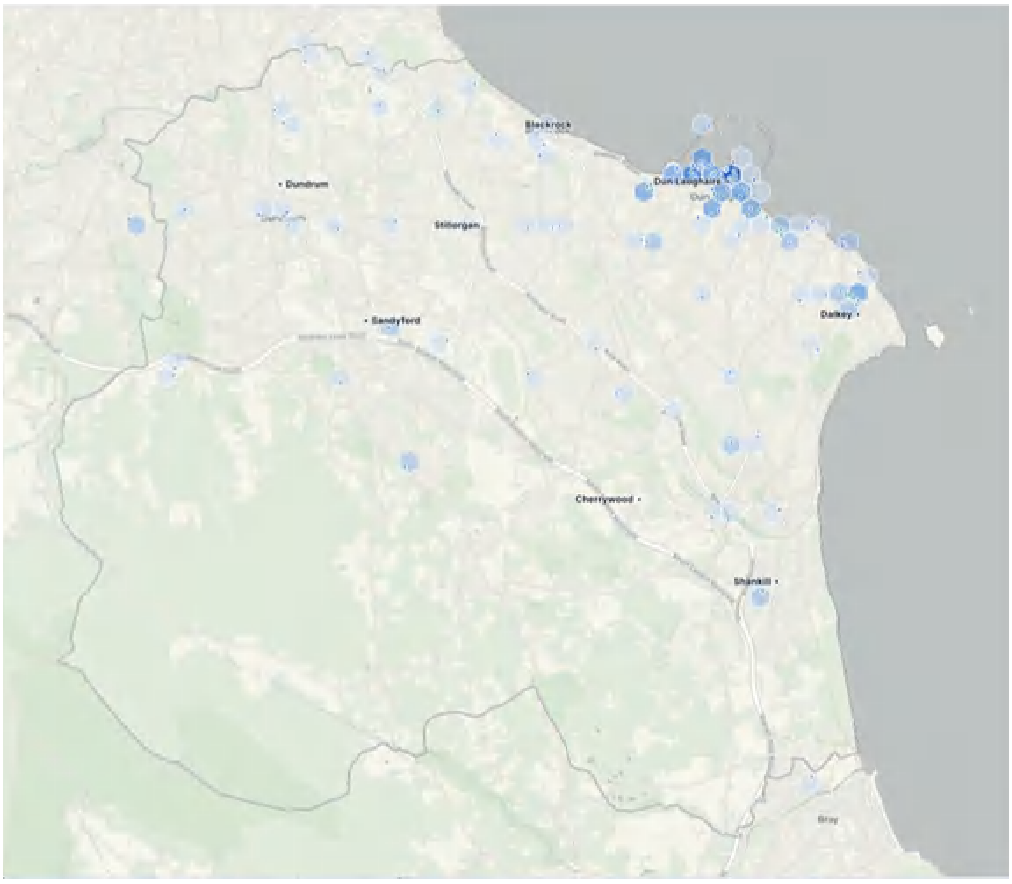
A blue economy of 178 businesses, concentrated around the harbour and the Dalkey coast.

Spatially, the MAPs trading layer concentrates in two clear poles. The Dundrum-Balally electoral division, which covers most of the Sandyford Business District, holds 1,737 trading businesses, roughly one in seven of all trading businesses in DLR. The two Dún Laoghaire town-centre electoral divisions, East Central and West Central, jointly hold 1,162 trading businesses, and adding Salthill and Sandycove lifts the wider Dún Laoghaire town footprint to 1,538.

They function as different kinds of economic anchors: Sandyford as the business-park engine, and Dún Laoghaire as the harbour town with a wider economic role.

A first specialist cluster reads off the harbour. 178 businesses in the MAPs layer carry blue economy keywords across name, sub-domain, summary and offerings: seafood and fisheries, sailing and boating, harbour/ferry/maritime ops, watersports and sea-swim, and a small marine science and tech bucket. 41% of the 178 sit in the three Dún Laoghaire town electoral divisions, and adding Dalkey and Sandycove pushes the harbour-and-coast share to roughly 56%.

These figures sit on web-capture data, so the true counts are likely higher than what the trading layer surfaces.



CATEGORIES	N=153
Seafood	53
Sailing	41
Harbour	46
Watersports	11
Marine sci/tech	2

DENSITY 1 → 16

Blue-economy businesses cluster tightly on Dún Laoghaire harbour and along the Dalkey coast.

DLR boundary · hex bins ~250m · OSM/Carto base

Energy-transition supply: 253 firms

An installed base concentrated in Sandyford and the Dundrum/Clonskeagh corridor.

A second specialist cluster is forming on the energy-transition supply side.

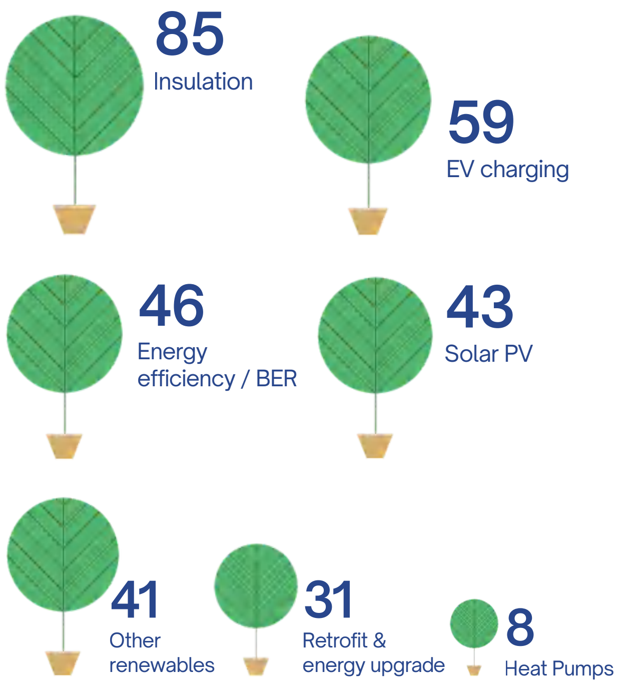
253 firms in the observed layer carry visible offers in solar PV, heat pumps, retrofit, insulation, EV charging, energy efficiency, BER assessment or other renewables. The mix leans toward insulation (85), EV charging (59), energy efficiency and BER (46), solar PV (43), other renewables (41) and retrofit (31), with a smaller heat-pump sub-cluster (8). The densest single Electoral Division for these suppliers is Dundrum-Balally, with 54 of the 253.

That puts much of the visible delivery capacity in the same business-park corridor as the wider corporate-services cluster. The keyword inference counts visible mention of these capabilities rather than verified delivery, so it should be read as the floor of an installed base, not as a procurement-grade register.

Sub-cluster mix

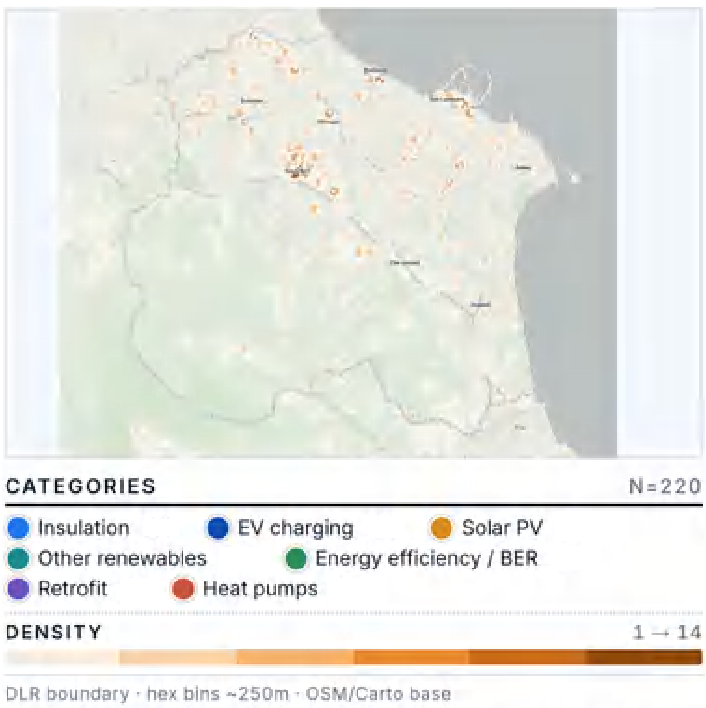
Firms (primary match)

Total 313 Firms



253 energy-transition suppliers led by insulation, EV charging, energy efficiency, solar PV and other renewables

Where they sit



Energy-transition suppliers concentrate in Sandyford and along the Dundrum and Clonskeagh corridor.

A multilingual layer

196 businesses serving minority communities, with another 2,817 showing some non-English content online

The multilingual and minority-serving footprint forms a third specialist layer, and it's also the one most clearly marked as visible-but-incomplete.

Across six tested keyword clusters, the MAPs layer identifies 196 minority-serving businesses: Chinese 86, Indian or South Asian 63, Spanish or Hispanic 17, Brazilian or Portuguese 14, Polish 12 and French 6.

These counts capture businesses that publicly signal to, serve or are legible to particular communities, mainly through food, grocery, wellness and service language.

The Polish count of 12 is almost certainly understated. Polish is DLR's largest non-English first-language community per section 4, but Polish businesses here mostly operate in English with English-coded names.

The keyword method catches Indian and Chinese hospitality through cuisine vocabulary like biryani, tandoori, dim sum or mandarin, but Polish identity rarely surfaces in public-facing text, so the method has a structural blind spot for this community.

A wider scan finds 2,817 businesses whose websites carry at least one non-English signal, though only 42 are functionally multilingual at two or more languages and 818 expose an explicit language switcher.

Six community tested clusters

Minority Serving businesses identified across six community clusters

Total 196 Businesses

86 Chinese-cuisine / medicine

63 Indian / South Asian

17 Spanish / Hispanic

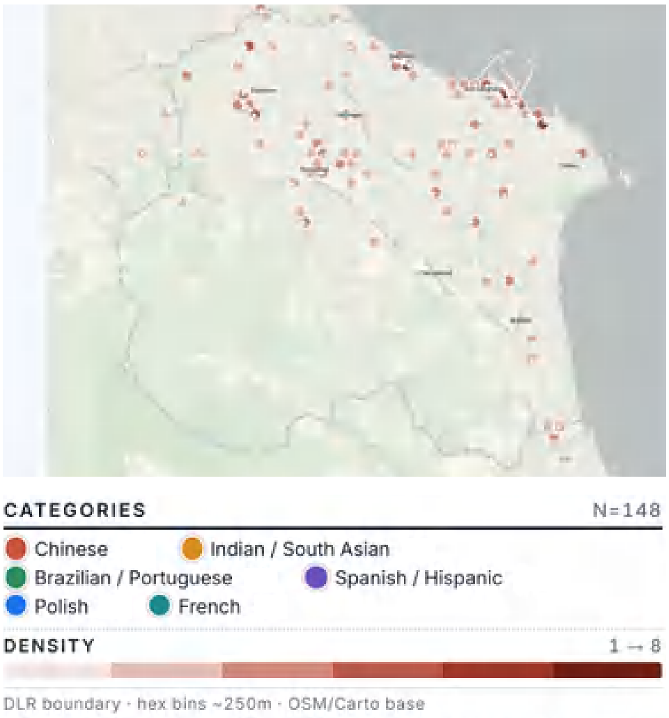
14 Brazilian / Portuguese

12 Polish

6 French

196 minority-serving businesses identified across six community clusters, led by Chinese (86) and Indian or South Asian (63).

Where they're visible



Visible minority-serving businesses across DLR, coloured by community signal and concentrated in town centres.

The diaspora economy Footprint

Where the minority-serving cluster shows demand-side legibility, a wider supply-side reading shows 3,401 businesses across DLR carrying at least one diaspora-economy marker, whether through ownership cues, language signals, named overseas connections or sector concentrations associated with diaspora trade.

This is the supply-side complement to the resident diversity profile in section 4, where 54,228 residents (24%) are overseas-born, including the 12,609 UK-born, 5,576 India-born and 2,416 Poland-born populations.

The 3,401 business figure captures the rough scale of the footprint. Many migrant-founded firms operate entirely in English and don't surface in any keyword scan. Multilingual websites can equally belong to Irish-founded firms serving international clients.

What the figure does establish is that the supply-side footprint of DLR's diaspora economy is far larger than the 196 explicitly minority-serving businesses captured above, and that visibility alone is a poor proxy for the actual scale of diaspora participation in the local economy.

This visible footprint is indicative supply-side participation, not a founder-origin count.

The figure is best read alongside section 14's data note on the underlying derivation.

SME stress: the signal and where it hits hardest

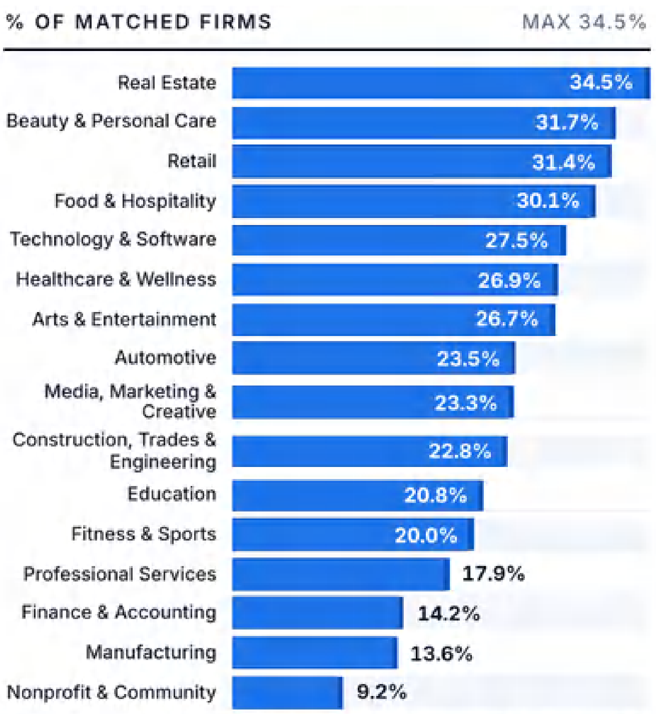
Retail, hospitality and personal care carry the sharpest targetable signal

The financial layer adds a fourth dimension to the registered view. Among 9,980 trading-eligible registered entities filing both a current ratio and a net-worth figure 3,167 (31.7%) carry simultaneous distress markers: short-term obligations exceeding current assets, and liabilities exceeding assets."The signal is built from the accounts data. Genuine trading-SME stress sits alongside start-ups still in early loss, dormant entities, and other non-trading vehicles. Real Estate has been excluded in this analysis, since property SPVs run on intercompany loans rather than trading-cycle credit.

The sector cut is the cleaner read. Among trading-SME categories with at least 30 matched records, Beauty and Personal Care (31.7%), Retail (31.4%) and Food and Hospitality (30.1%) sit highest, exactly the population that rate-relief discussions tend to centre on.

Geographically, the Dundrum-Balally Electoral Division tops the count with 80 stressed observed businesses, though some of that concentration tracks Sandyford registration density rather than trading distress inside the local economy. The map is best used as a targeting aid, not a verdict on any single place.

Stress rate by observed sector



Beauty and personal care, retail and food and hospitality sit highest among trading-SME categories; real estate is elevated for accounting reasons.

Where the stress lands

Where stress-flagged trading SMEs sit on the map, coloured by sector to show which categories are most exposed.

Cross-border Connections

187 DLR-registered entities have a UK ultimate parent, the largest non-Irish ownership country, with the US at 145, Cayman Islands at 76, France at 64 and Luxembourg at 46.

A further 172 entities have a UK immediate (rather than ultimate) holding company. The UK code includes Northern Ireland without splitting it out, so the 187 figure is a ceiling for the Great Britain footprint specifically and a floor for the all-island read that Section 11 picks up as the empirical anchor for the Shared Island Economic Corridor.

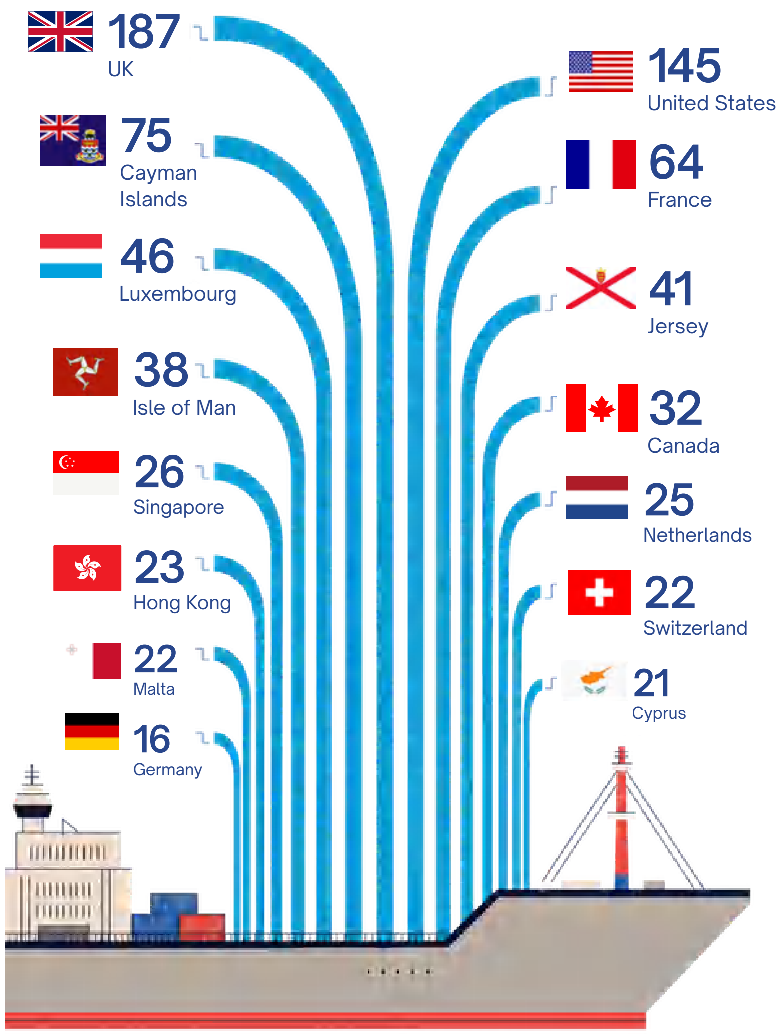
Of the 187 UK-parented entities, 123 carry a usable turnover signal totalling roughly €4.7bn, with median implied turnover near €2.6m. These are typically operating subsidiaries of UK groups with substantive trading activity attached to DLR rather than registration shells, and they point to firms that already understand cross-border procurement, regulation, ownership and market access.

Where DLR-registered ultimate parents sit (ex-Ireland)

DLR-Registered Entities

Total 784 Registered Entities

Britain leads non-Irish ownership at 187 entities, ahead of the United States, Cayman Islands, France and Luxembourg.



Private Healthcare Clusters

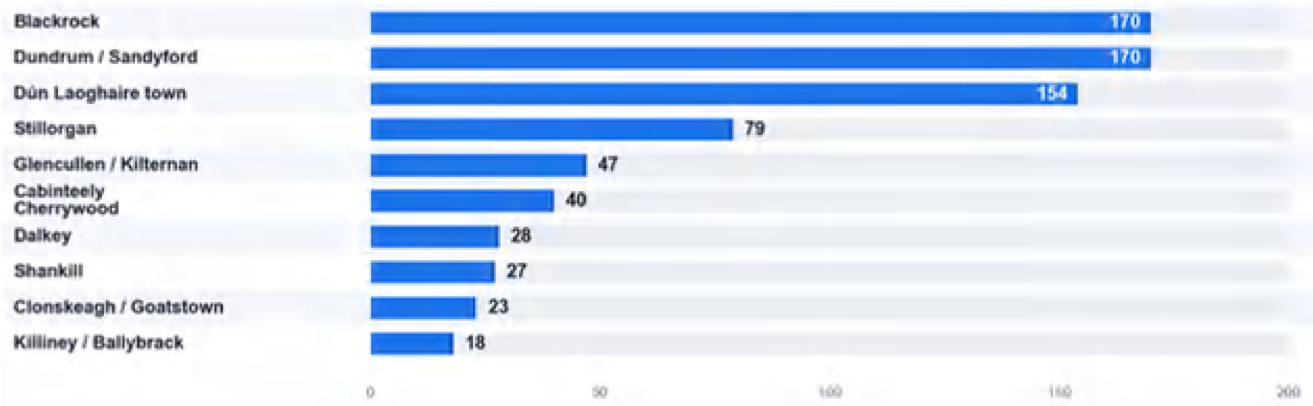
The largest single sector in the MAPs layer is healthcare and wellness, with 1,583 businesses across DLR, and within that sits a 909-business private-medicine cluster identified through sub-domain and offering markers covering general practice, specialist consultancy, diagnostics, dental, optical, allied health and private hospital services.

Beacon Hospital anchors the south end of the Sandyford spine and is one of DLR's two largest single private-medicine sites; the Blackrock Clinic sits at the centre of the Blackrock village commercial cluster.

The cluster is the supply-side response to section 4's 49,999 residents reporting a long-lasting condition and 39,918 residents aged 65 or over. It includes both private and HSE-public providers, since the source data doesn't separate operating models, and firms trading under personal names rather than clinic-style sub-domains may not surface in the keyword scan, so the 909 figure is best read as a floor.

Private medicine cluster by DLR centre - 909 businesses

Cluster total 909 · vs broader Healthcare & Wellness 1,583



An education-led creative spine running through IADT

853 broad-creative businesses, 346 aligned to design, media and digital production, 23 explicitly name-checking IADT.

A creative cluster of substance runs through Dún Laoghaire town and out into Sallynoggin West, anchored on IADT (the Institute of Art, Design and Technology) and the National Film School at IADT, with Media Cube, the IADT business incubator, sitting on the campus itself.

The MAPs layer captures 853 businesses across DLR carrying broad creative-industry keywords, 346 of those aligned tightly to design, media and digital production, and 23 explicitly name-checking IADT in their public materials.

The 95 media, marketing and creative firms recorded in the Dún Laoghaire town electoral divisions form the visible high street of the cluster.

The 23 IADT name-checks are conservative, since many graduates and IADT-affiliated firms don't advertise the link publicly, and the wider 853 figure relies on keyword inference, so the cluster's actual scale is materially larger than the explicit count suggests.

A heritage business base still trading from DLR

365 firms incorporated before 1980, 878 before 1990, 2,044 before 2000.

The CRO register carries a depth dimension that headline growth and pipeline narratives can obscure. 365 entities currently on the register were incorporated before 1980, 878 before 1990 and 2,044 before 2000.

Names still trading today include Smurfit Kappa Ireland (1898), Heitons (1896), Findlaters (1904) and Chadwicks (1909), each with continuous registered presence in or attached to the county.

This base sits as a continuity layer alongside the 8,062 post-2020 incorporations covered later, balancing the report's growth-and-pipeline framing with the firms that have anchored the local economy across generations.

The figure includes registered entities of all kinds (trading firms, holding companies, charities and dormant entities), and pre-1900 incorporation dates can reflect the re-registration of older partnerships, with some entities now branches of larger groups headquartered elsewhere.

Chapter 6

Digital and Innovation Profile

- Headline findings
- Digital presence
- Sophistication tiers
- E-commerce capability
- Channel multiplicity
- Talk-and-walk gap
- Innovation and digitalisation
- Sector lens
- AI footprint
- Opportunity ahead

A digital base ready for the next step

Most DLR firms are online and over half operate above basic sophistication, with clear room to lift town-centre and SME operators.

87.9% of trading DLR businesses carry at least one digital channel, and 57.2% sit at Intermediate or above on the sophistication ladder. The biggest opportunity for targeted support sits in moving Basic-tier firms to Intermediate. Town-centre hospitality and a small but visible AI cluster are the next areas to focus on.

Key Findings:

DLR has the conditions for a modern digital business economy: visible digital presence, sophistication tiers, ecommerce capability, AI footprint and innovation signals all in place, with clear scope to support more firms into higher maturity, particularly in town-centre and SME segments.

More than four in five DLR businesses are visible online

87.9%
Of observed firms carry at least one digital channel

31.7%
Operate on three or more digital surfaces

163
Businesses carry an AI signal in the data

57% of DLR firms now sit at Intermediate or above on the digital ladder

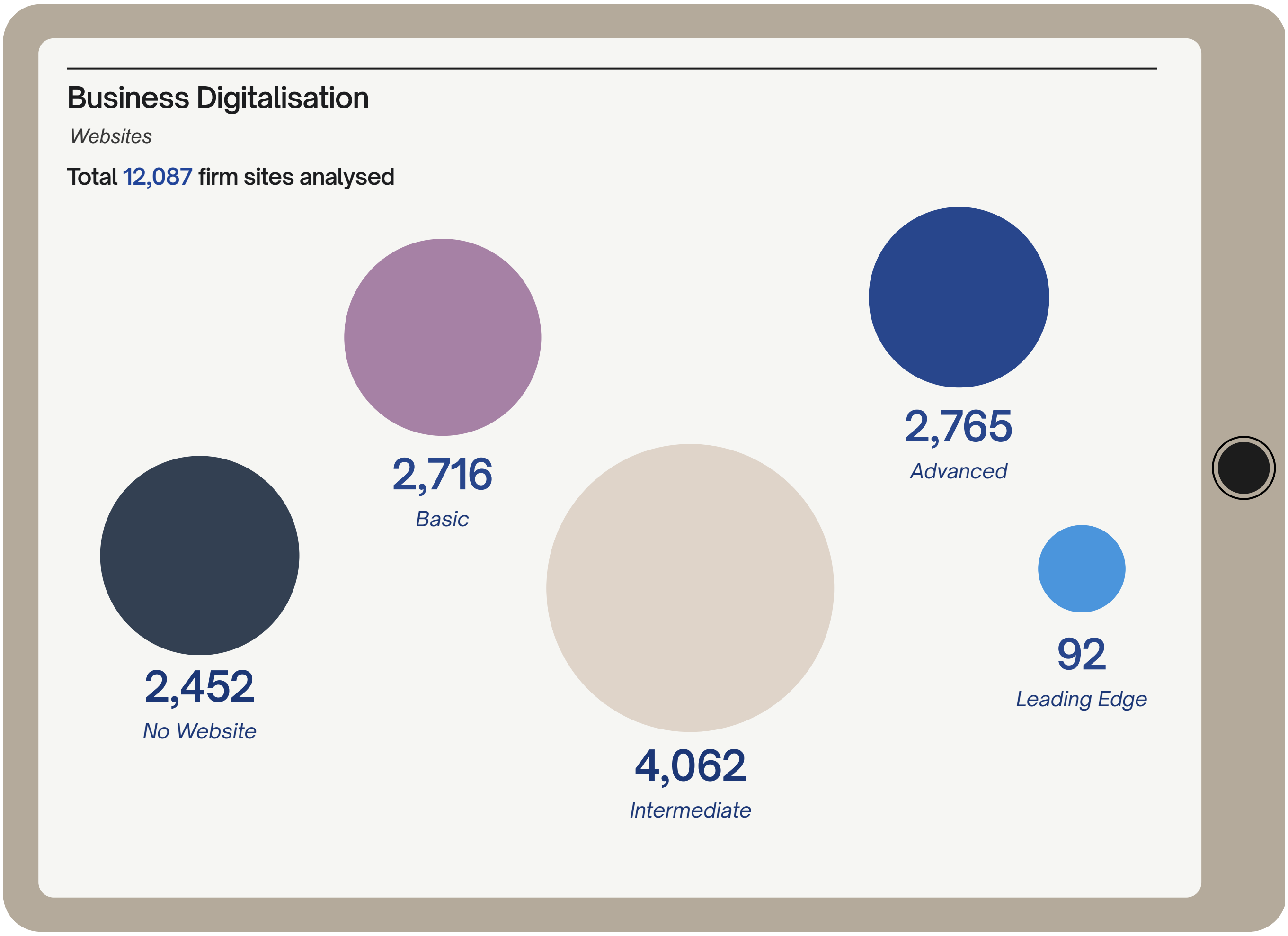
Each website was scored against a twelve-point stack covering content management, e-commerce, booking and login surfaces, analytics, payment tooling, AI tooling and internationalisation.

4,062 businesses sit at Intermediate, 2,765 at Advanced and 92 at Leading-edge, with 2,716 at Basic and 2,452 with no website at all.

Adding the top three tiers gives 6,919 firms at Intermediate or above. DLR's 57.2% at Intermediate or above sits at roughly the current EU baseline of 57–58%

The EU Digital Decade target asks for 90% of SMEs to reach a basic level of digital intensity by 2030; the local definition isn't a one-for-one match, but DLR is comfortably past basic on its own ladder.

Intermediate is the tier where a business runs integrated digital operations, booking, e-commerce, CRM, accounting, not just a static online presence. It's the EU's "basic digital intensity" threshold.

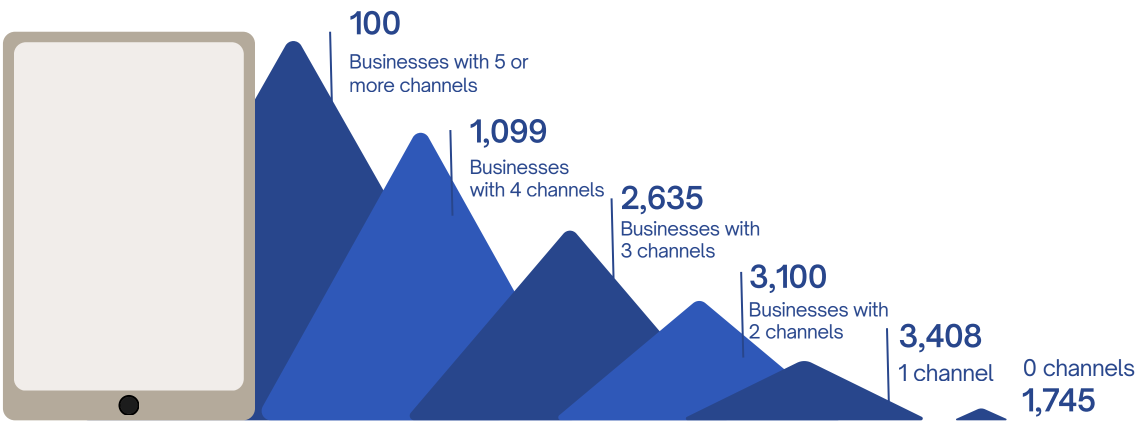


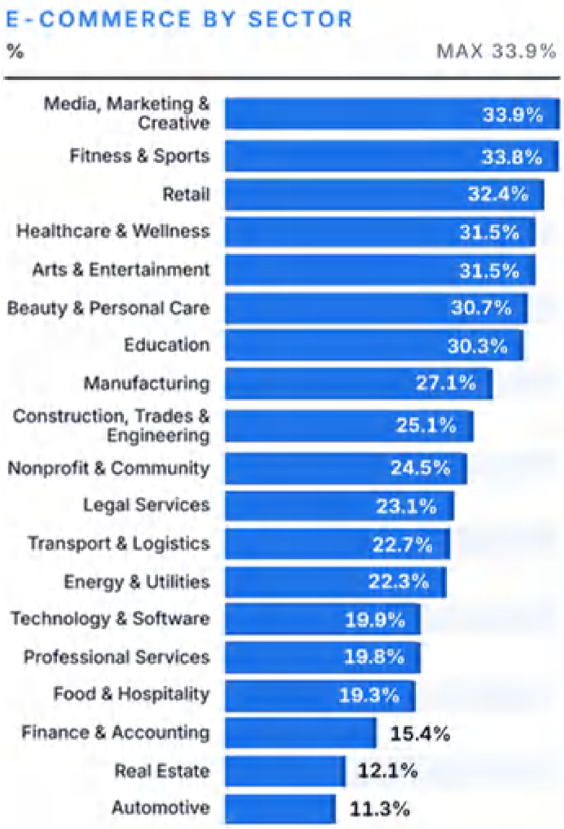
Past pilot stage: 24% on e-commerce, 35% running three-plus channels

24.1% of trading businesses carry a detected e-commerce platform, with WooCommerce, Wix, Squarespace and Shopify the most common engines. 35.1% run three or more digital channels, and 100 firms operate on all five surfaces tracked.

Channel Multiplicity

Observed Businesses with digital channels

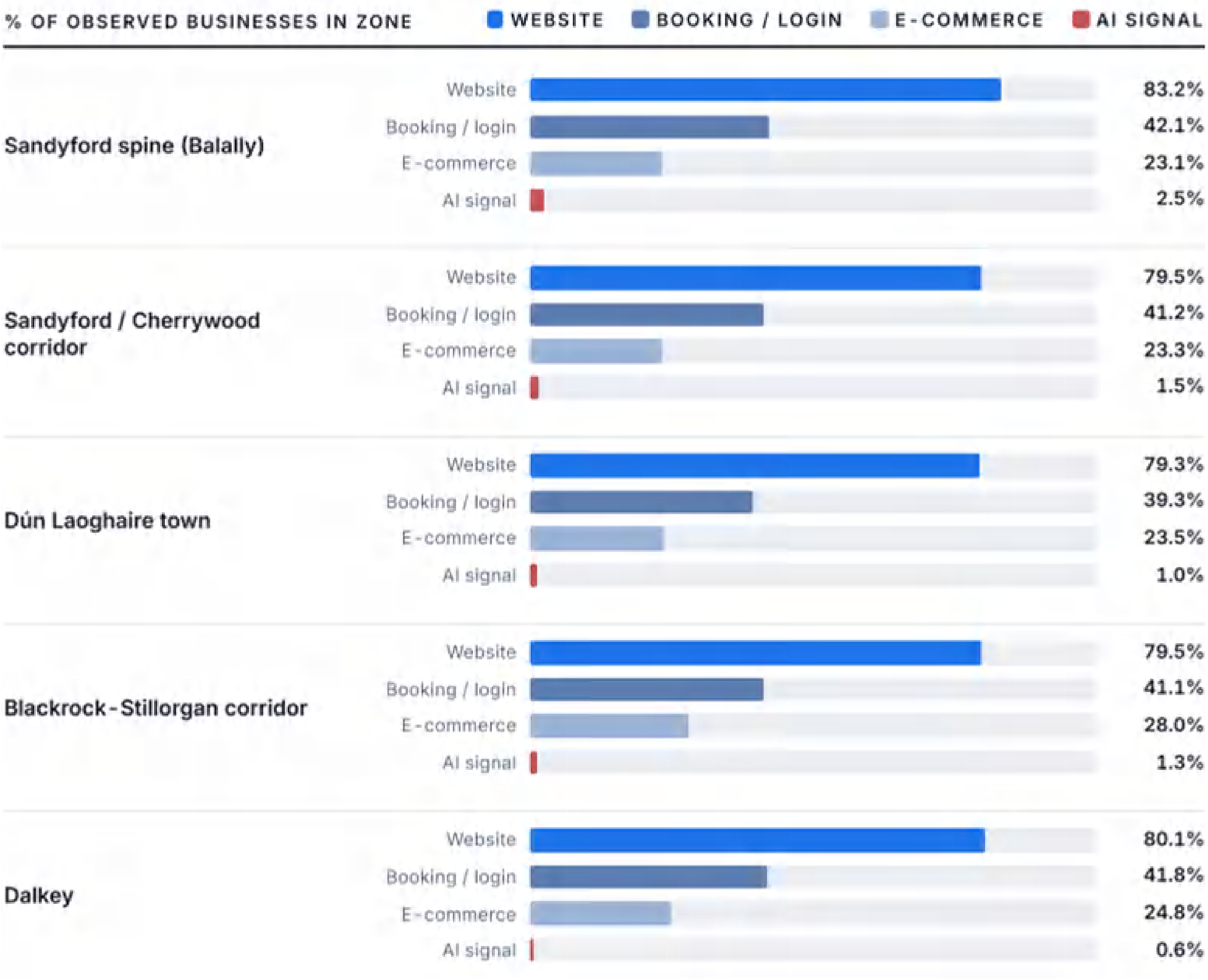




Digital intensity varies across DLR's five macro-zones

Sandyford , anchored on the Dundrum-Balally electoral division with 1,737 trading businesses, leads on website coverage at 83.2% and on AI density at 2.53%.

The Blackrock-Stillorgan corridor leads on e-commerce at 28.0%, which reads as a town-centre and retail signal. Dún Laoghaire town, with 1,538 trading businesses, sits at the county average on e-commerce (23.5%) and below average on AI density (1.04%), making it a clear target for town-centre digital support.



Bars within each zone are independent percentages, not parts of a 100% total. Macro-zones follow the same author-defined ED groupings used in Section 3.

These signals are inferred from publicly observable web and platform evidence. LinkedIn presence is proxied by employee-count fields, reviews by review counts, tier cut-offs are author-defined and AI signals are detectable only on cleanly-fetched sites. Read directionally, the picture is consistent: DLR has the digital base of a growing business and technology hub, with addressable headroom of around five thousand firms where the next step up the ladder pays off through better discovery, easier booking, more online trading and a stronger operating base for the next phase of development.

A small but visible AI cluster, anchored in Technology & Software

163 observed businesses carry any AI signal: 75 with AI in the product itself, 5 with AI in marketing language only and 83 with AI tooling detected in the website stack. That represents 1.3% of the observed base and 2.1% of the 7,597 sites that fetched cleanly. The cluster is concentrated in Technology & Software, where 51 of the 75 AI-in-product firms sit.

Customer Voice Seed

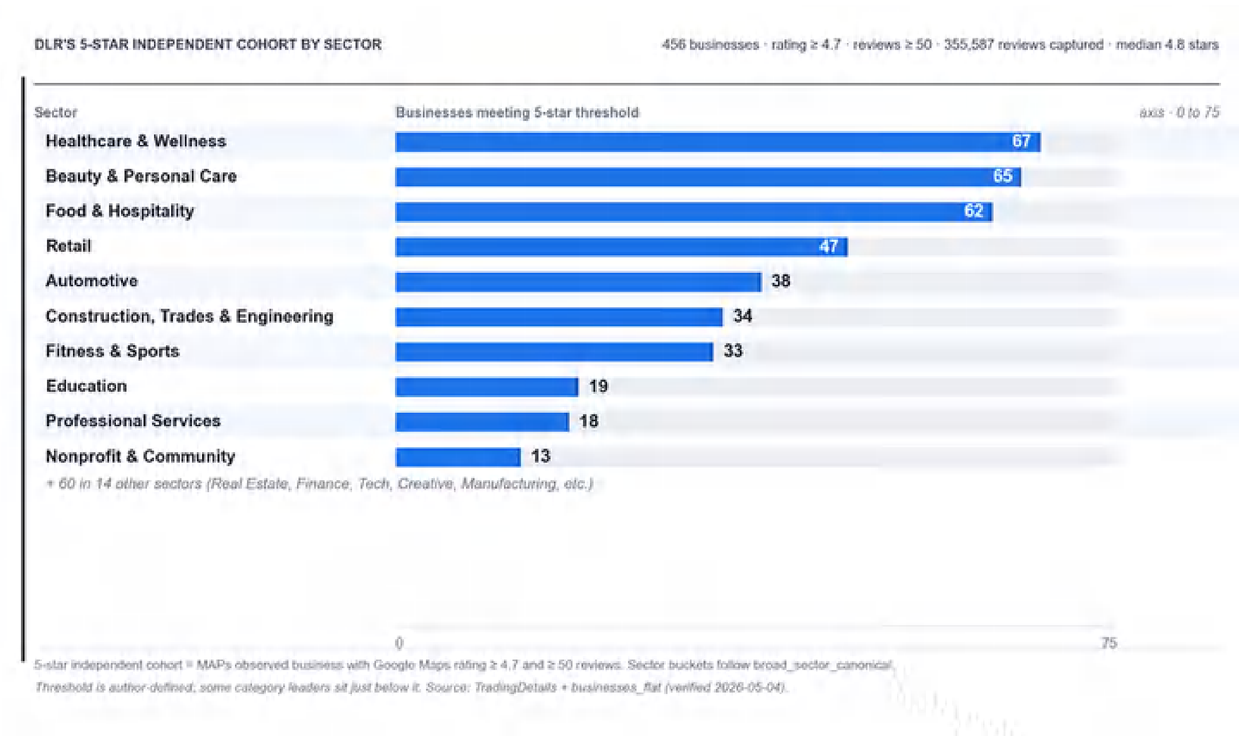
Customer reviews form a fourth analytical layer inside the MAPs trading view.

355,587 customer reviews. Median 4.8 stars

3,733 of DLR's trading businesses carry at least one Google Maps review, totalling 355,587 captured review events. The median rating across this rated base is 4.8 stars, with 58% scoring 4.7 or higher,excellence is the visible norm rather than the exception.

A 5-star independent cohort sits inside that base: 456 businesses with a rating of 4.7 or higher and 50 or more reviews. The cohort spreads across Healthcare and Wellness (67), Beauty and Personal Care (65), Food and Hospitality (62), Retail (47), Automotive (38), Construction and Trades (34) and Fitness and Sports (33), reaching into trades, education and community alongside the obvious customer-facing sectors.

Total review volume per centre acts as a footfall proxy: Dundrum and Sandyford lead by volume, while Dalkey, Sandycove and Dún Laoghaire town lead by excellent-share. Where customers consistently say excellence already lives, targeted support amplifies what they've already validated.



Live Hiring footprint

A small but actionable live hiring footprint

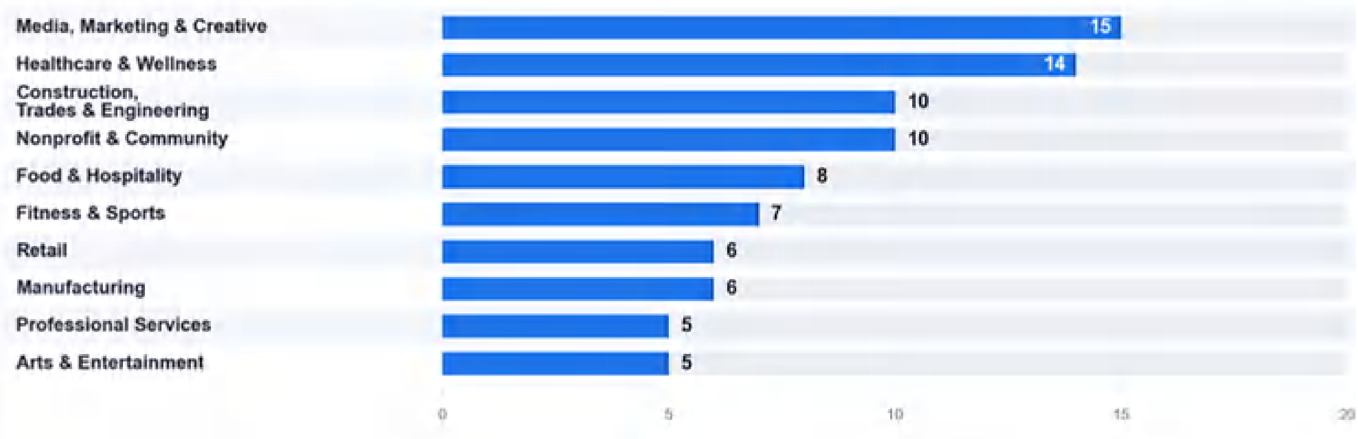
A small and clearly defined cohort of DLR businesses is visibly hiring at any given time. 33 are actively advertising open roles on their own websites or LinkedIn pages at the time of capture, and 114 carry broader live-hiring signals such as careers pages, recruiter contacts or open expressions of growth intent.

The figure is a floor rather than a ceiling, since most hiring activity in Ireland runs through job boards like IrishJobs, Indeed and LinkedIn Jobs that aren't surfaced in the MAPs scrape, and public role advertising skews to growth-stage firms with the brand confidence to advertise openly.

What the cohort offers Chamber, LEO and Council partners is a defined and reachable list of growing local employers, picked up again as an action footprint in section 13.

Live-hiring cohort by sector - Top 10 broad sectors

Total cohort 114 firms · shown 86



Chapter 7

Sustainability

- Sustainability capability from the MAPs zone
- Sustainability demand vs local supply

A practical sustainability economy meets a working evening trade

DLR has 427 visible sustainability businesses with retrofit demand running well ahead of local supply.

MAPs identifies 427 sustainability businesses across retrofit, circular, advisory and coastal stewardship, with 207 in delivery.

Set against 62,529 pre-2000 dwellings, demand sits in the tens of thousands while local supply sits in the low hundreds. Dún Laoghaire town's 2026 Purple Flag accreditation rests on 54.1% of food and hospitality opening past 8pm.

Key Findings:

DLR has a practical sustainability economy already forming, with local suppliers delivering retrofit, energy transition, circular economy and coastal stewardship work, and Dún Laoghaire's 2026 Purple Flag accreditation gives externally validated evidence of town-centre stewardship and a working evening economy. Together they describe a safe, active and attractive place economy.

427
Visible sustainability businesses observed

62,529
Pre-2000 dwellings in retrofit-target stock

247
Pre-2000 dwellings per visible supplier

427 visible firms in retrofit, circular, advisory and coastal stewardship

The MAPs trading layer identifies 427 visible sustainability businesses across the county. They fall into four working buckets: 207 in retrofit and energy delivery, 156 in circular repair, reuse and recycling, 36 in ESG and sustainability advisory, and 28 in coastal and blue-economy stewardship.

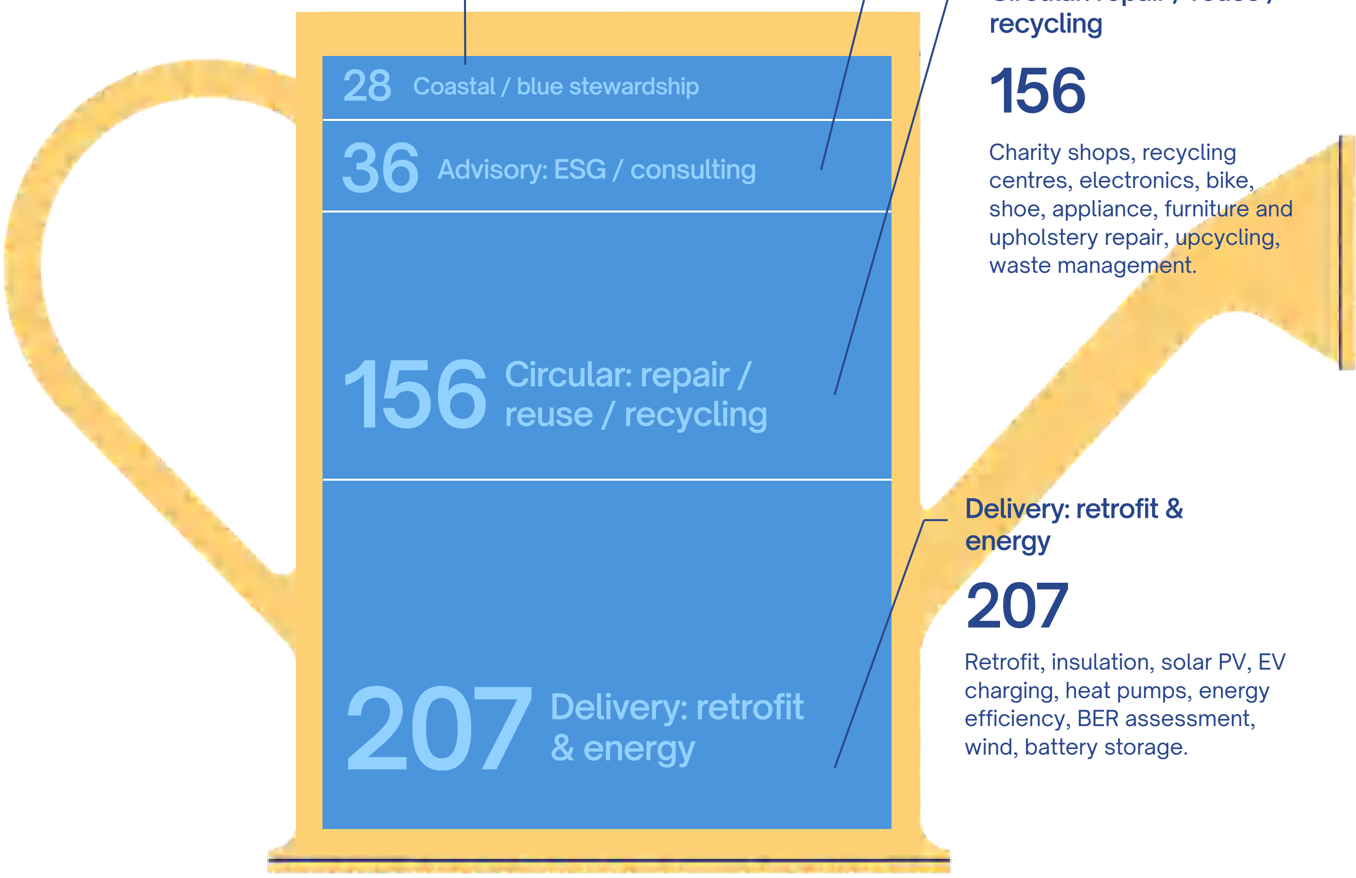
These classifications come from website and MAPs text, observed and inferred, drawn from public-facing signals rather than from a verified delivery register. Individual entries should be read as visible capability rather than certified capacity. The overall shape of the cluster is consistent across the dataset.

Observed Businesses

Residents

Total 427 Households or Businesses

The MAPs trading classification uses first-match-wins keyword assignment, with mutually exclusive buckets that sum to 427. Some operators sit in more than one bucket in practice, so first-match assignment may understate the breadth of capability for individual firms.



Coastal / blue stewardship

28

Coast Guard, marine science, marine conservation, environmental monitoring, biodiversity work.

Advisory: ESG / consulting

36

Sustainability, environmental, climate and carbon consulting; netzero advisory.

Circular: repair / reuse / recycling

156

Charity shops, recycling centres, electronics, bike, shoe, appliance, furniture and upholstery repair, upcycling, waste management.

Delivery: retrofit & energy

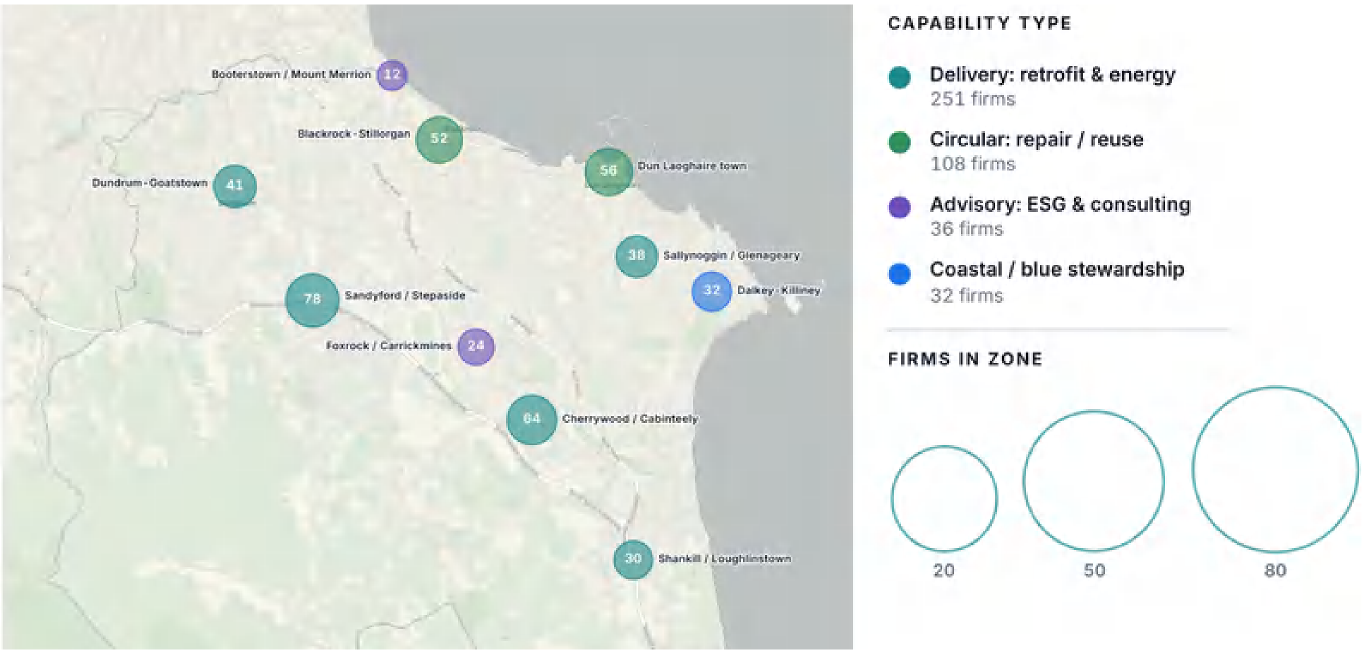
207

Retrofit, insulation, solar PV, EV charging, heat pumps, energy efficiency, BER assessment, wind, battery storage.

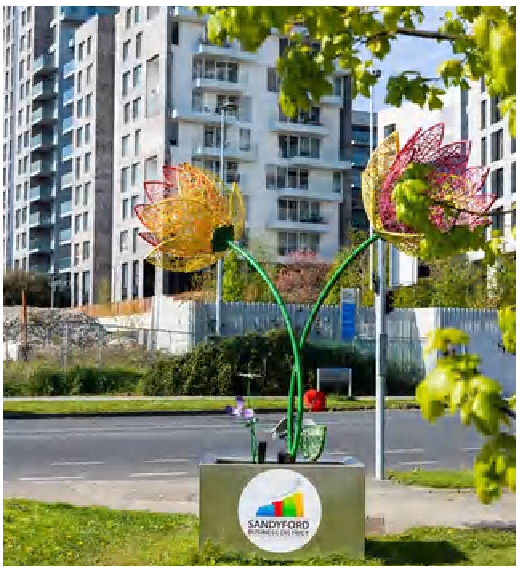
From Sandyford through Dundrum to the harbour town and south arc

The county-wide sustainability map reads as a single corridor with neighbourhood satellites. The main line runs from the Sandyford-Cherrywood employment cluster through Dundrum and Clonskeagh, with Dundrum-Balally the densest single electoral division for energy-transition supply at 54 firms.

Dún Laoghaire town adds secondary weight, with a steady presence along the south arc into Shankill and Killiney. Retrofit & Energy firms cluster around business-park and service infrastructure, while circular and place-based activity is more neighbourhood-facing. Together they give the county business-to-business capability and resident-facing services within the same sustainability economy.



Bubble size = visible sustainability firms in zone. Colour = dominant capability type. Boundary derived from OSM/Carto base; bubble placement is illustrative of the cluster centre, not a precise ED choropleth.



62,529 pre-2000 dwellings against 253 visible energy-transition suppliers

CSO Census 2022 data puts 62,529 of DLR's permanent private homes in the pre-2000 build cohort that the National Retrofit Plan points to for BER B2 upgrades, which is 73% of the county's permanent private stock.

71,117 households still run primary central heating on natural gas, oil, LPG, coal or peat, with only 15,636 reporting any renewable energy source. Set against the 253 visible energy-transition suppliers, that works out at roughly 247 pre-2000 dwellings per visible supplier, or 302 if only the 207-strong delivery bucket is counted.

Households or Businesses (DLR Count)

Residents

Total 212,794 Households or Businesses

71,117

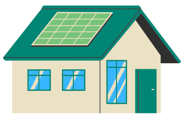
Households on fossil-fuel central heating

63,052

Households with no renewable energy source

62,529

Pre-2000 dwellings (retrofit-target stock)

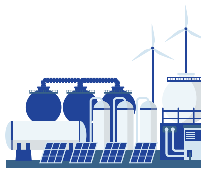


15,636

Households with at least one renewable

253

Visible energy-transition suppliers



207

Retrofit / energy delivery firms

Demand and supply sit on different scales here, with a five-figure addressable market set against a three-figure visible supplier base. Many suppliers serve customers across the wider Dublin region, and many DLR households will use suppliers based outside the county. The pressure ratio works as a directional signal at the county scale.

Two practical moves

1

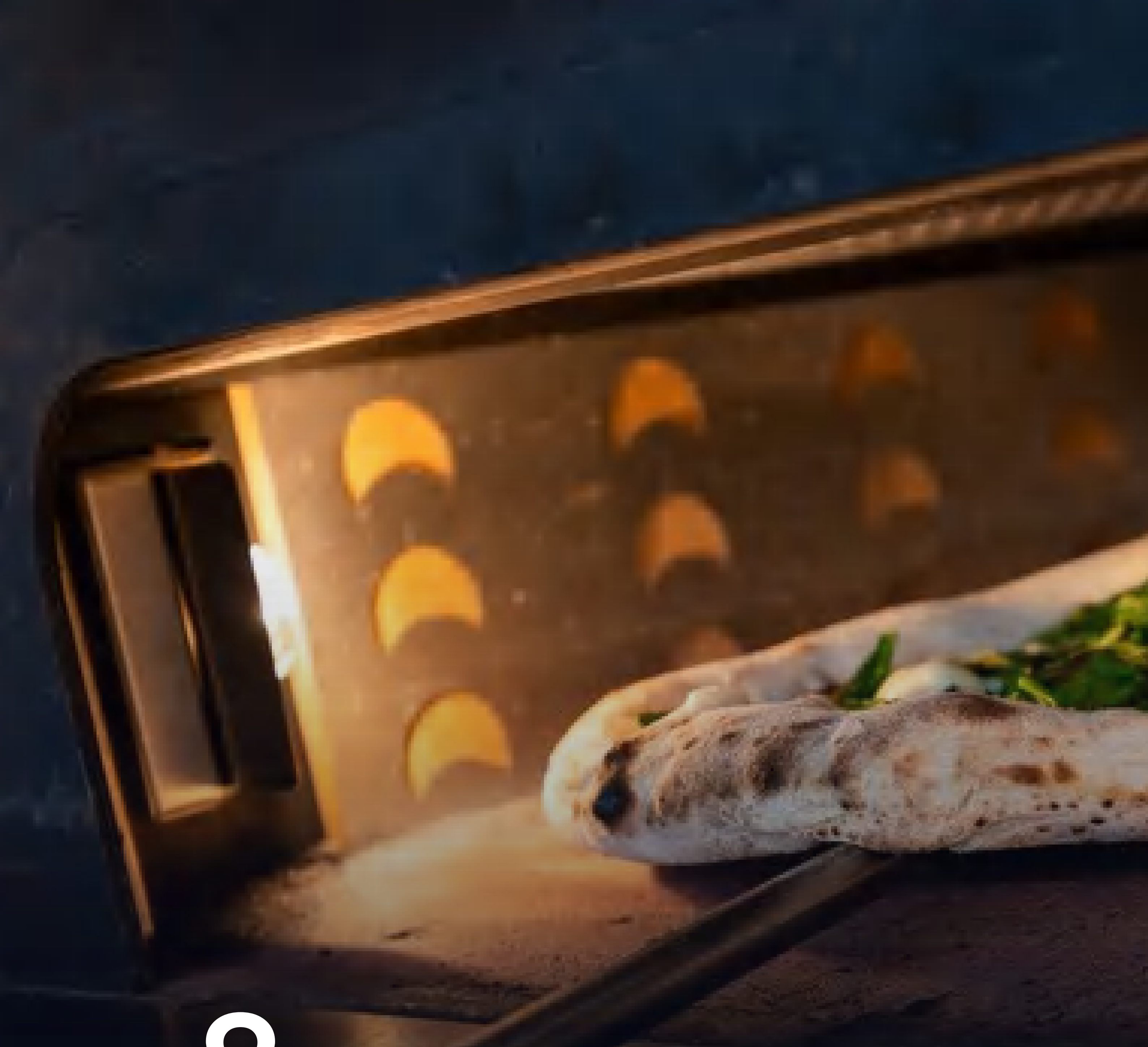
Supply-side capacity

Route Chamber, LEO and SEAI support toward firms in the 207-strong delivery bucket so they can scale crews, training pipelines and supply chains.

2

Demand aggregation

Pre-2000 housing concentrates in particular streets and estates. Street-level retrofit campaigns and onestop-shop bundling are more efficient than householdby-household uptake.



Chapter 8

Evening Economy

- Dún Laoghaire town's evening offer
- Partnership stewardship and the Purple Flag

A working evening offer with externally validated stewardship

The 2026 Purple Flag accreditation gives external validation for working town-centre stewardship and a real evening offer. The accreditation belongs to Dún Laoghaire town, not the county as a whole, and that boundary should stay clear.

Within it, the accreditation recognises stewardship that depends on Council, Chamber, An Garda Síochána, local businesses, hospitality operators, transport providers, residents' groups and community partners working in the same direction.

Dún Laoghaire town

Operating hours evidence

1,538
Observed businesses across four Dún Laoghaire town Electoral Divisions

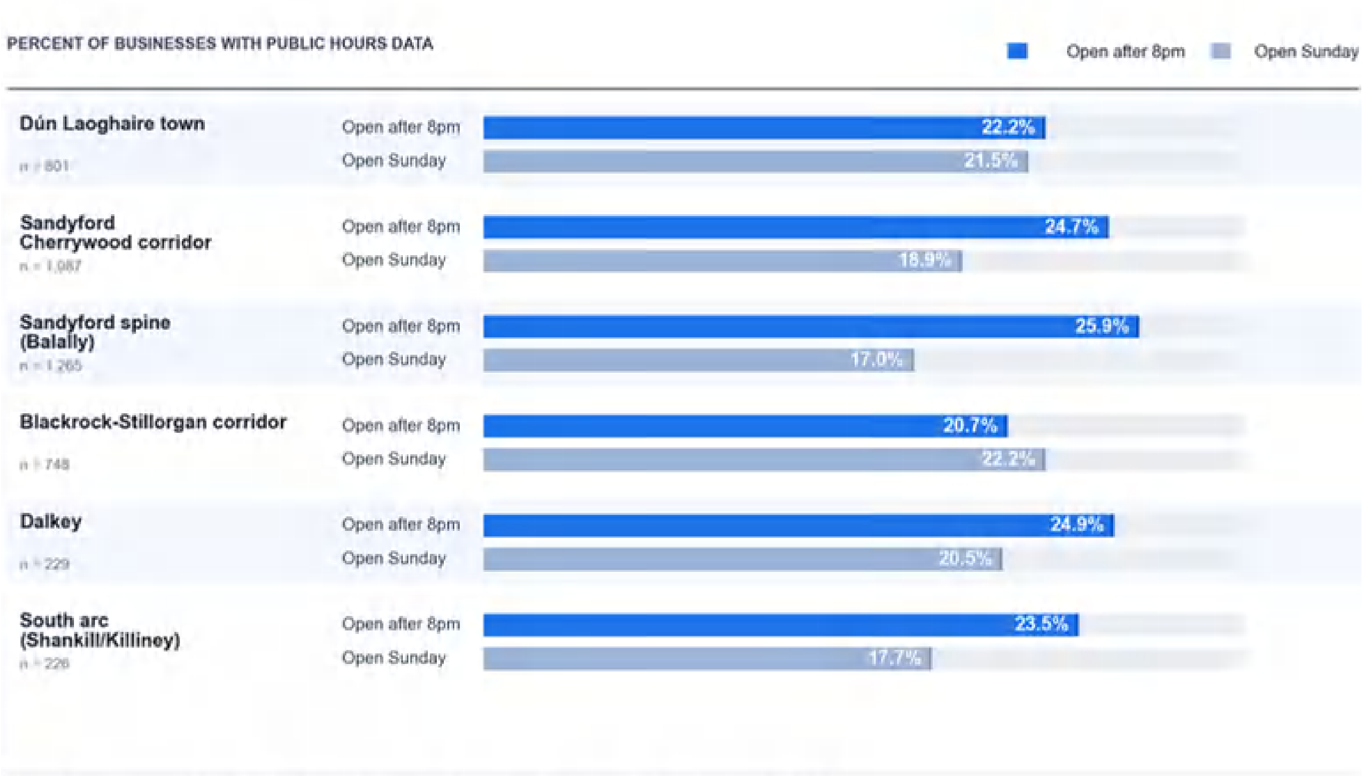
23.7%
Open after 8pm across all sectors

54.1%
Of Food & Hospitality open after 8pm

1,459
County-wide observed businesses open after 8pm

The bones of a stewardship case in every principal centre

Blackrock-Stillorgan sits at a similar evening-economy baseline to Dún Laoghaire town across the all-sector measure. Dundrum, Stillorgan, Blackrock and Sandyford each have the bones of a stewardship case: a Council relationship, a hospitality core, a transport interchange and a residents' base. Each plays a different role: retail destination, coastal village centre, suburban service hub or employment district.



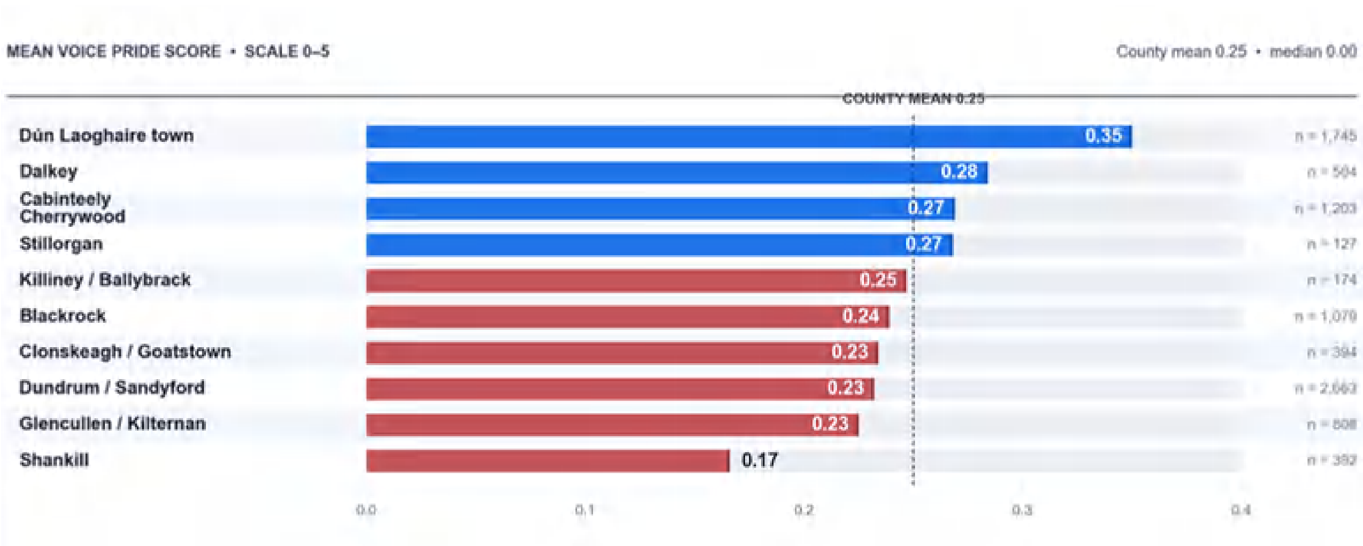
Independent percentages, not parts of a 100% stack. Denominator: businesses with public Google Maps operating-hours data.

The place-pride score that reads off local business voice

The clearest place-attachment signal in the data comes from businesses that describe their place as part of their identity.

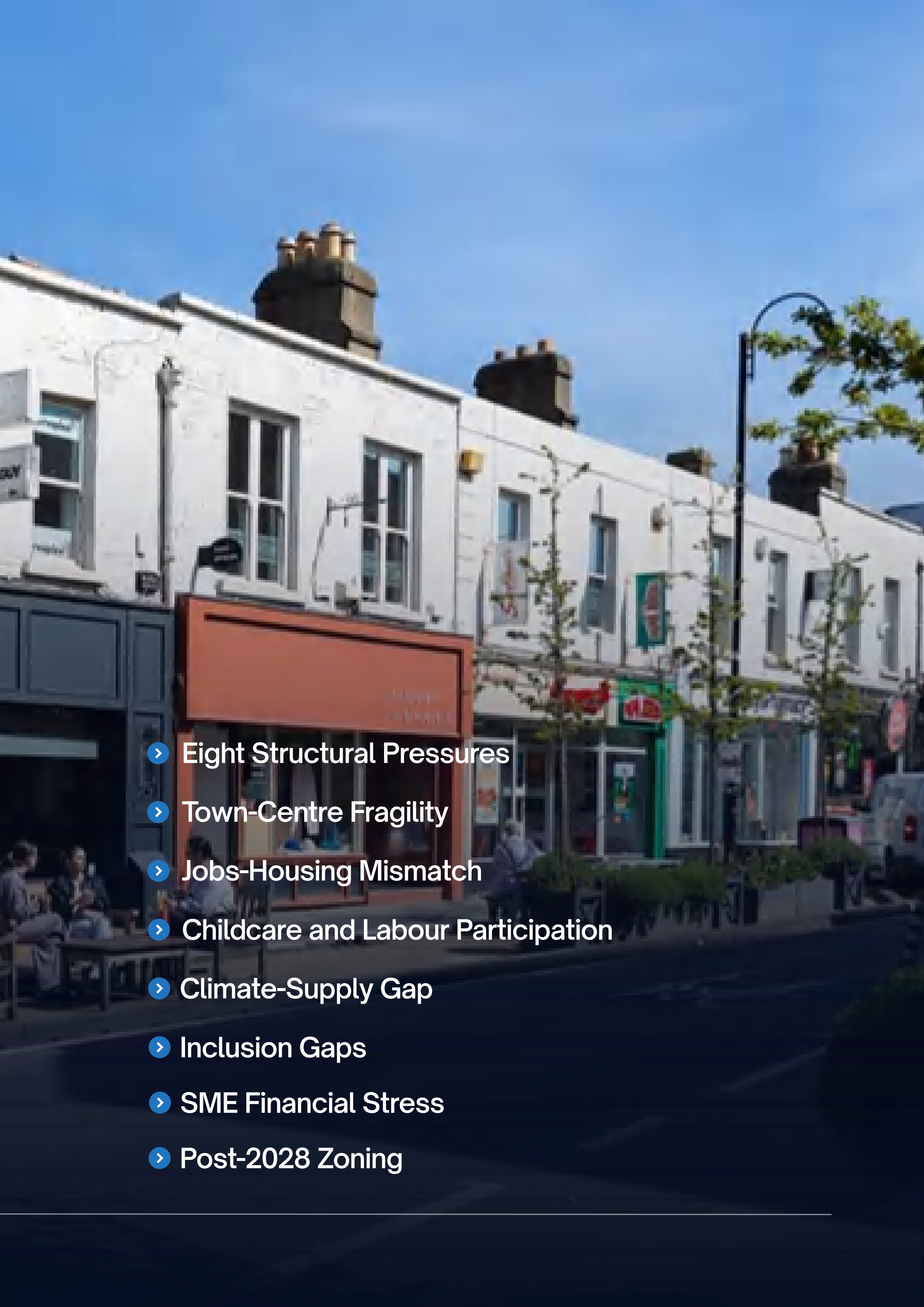
Around the harbour is where place-language in business voice runs strongest. Sandycove businesses regularly mention the Forty Foot. Harbour-front operators reference the East and West Piers in their public copy, and the National Maritime College of Ireland appears by name in the copy of businesses operating alongside it. Further inland, IADT and the Media Cube incubator show up across Dún Laoghaire town and Sallynoggin business copy. Dalkey, Cabinteely and Cherrywood each show distinct per-village patterns, with operators in those areas tending to identify with their centre before describing what they sell.

What that pride does for the local economy is real. Businesses that speak as part of a place act as its visitor signage, its informal marketing and its first line of stewardship. They tell newcomers what the place is for. They give residents a reason to feel ownership of the centre they live in.



Chapter 9

How People and Businesses Fit Together



- Eight Structural Pressures
- Town-Centre Fragility
- Jobs-Housing Mismatch
- Childcare and Labour Participation
- Climate-Supply Gap
- Inclusion Gaps
- SME Financial Stress
- Post-2028 Zoning

Where DLR's residents and businesses meet, across eight matched tests

Across eight cohort and supply tests, DLR shows specific alignment strengths and specific opportunities.

A practical lens on whether DLR's business base meets the daily needs of its residents. Eight tests pair specific cohorts (single-person households, hybrid workers, carers, minority communities, future residents) with their visible supply. Three sit in functional alignment, three reveal concentrated opportunity, and retrofit sits in a category of its own at 247 pre-2000 dwellings per visible supplier.

Key Finding:

Across eight cohort tests, retrofit is the only opportunity that sits in a category of its own. At an indicative €2.5bn lifetime market against 62,529 pre-2000 DLR dwellings, it is roughly ten times larger than every other cohort opportunity tested anywhere in this report.

8
Cohort × supply tests in this section

~60,000
Hybrid-rhythm DLR workers (43.4% WFH)

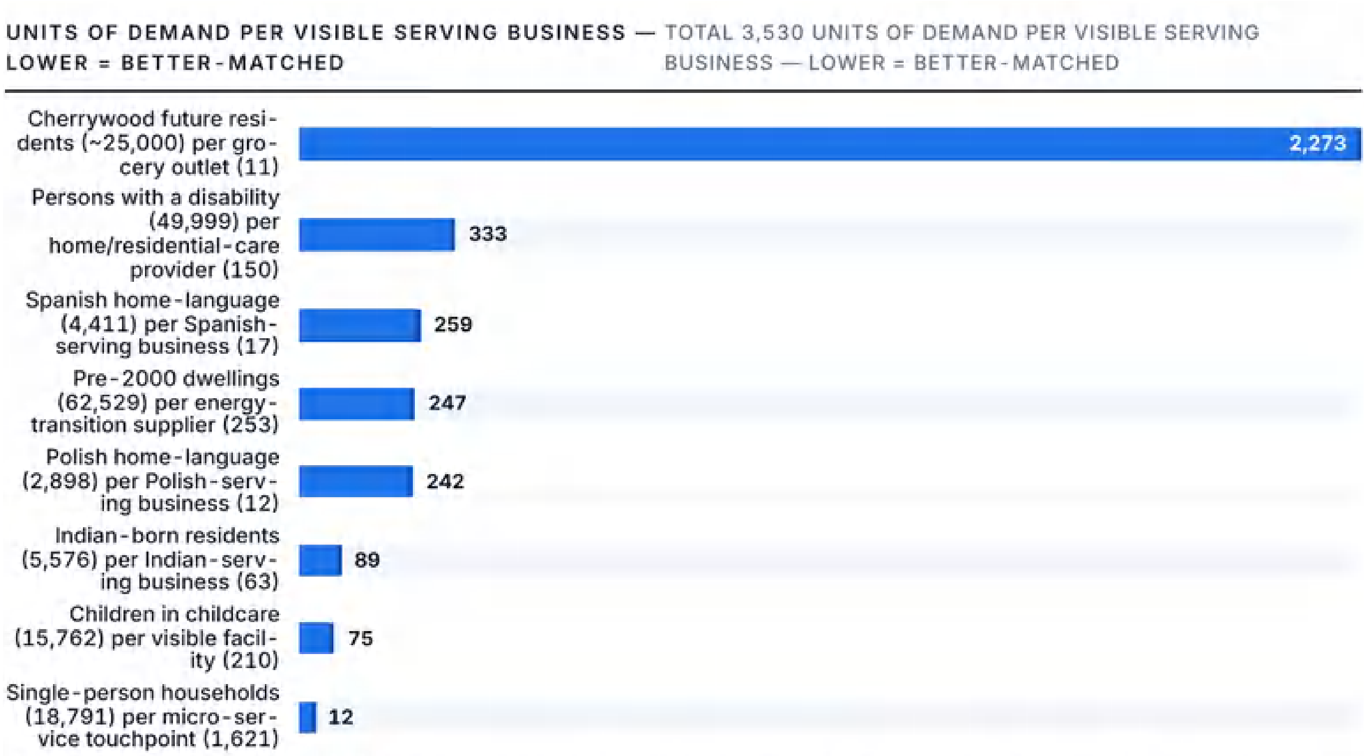
18,791
Single-person households (28.4% of all households)

€2.5bn
Indicative DLR retrofit market, lifetime

From 12 demand units per business to 2,273: where alignment is and isn't happening

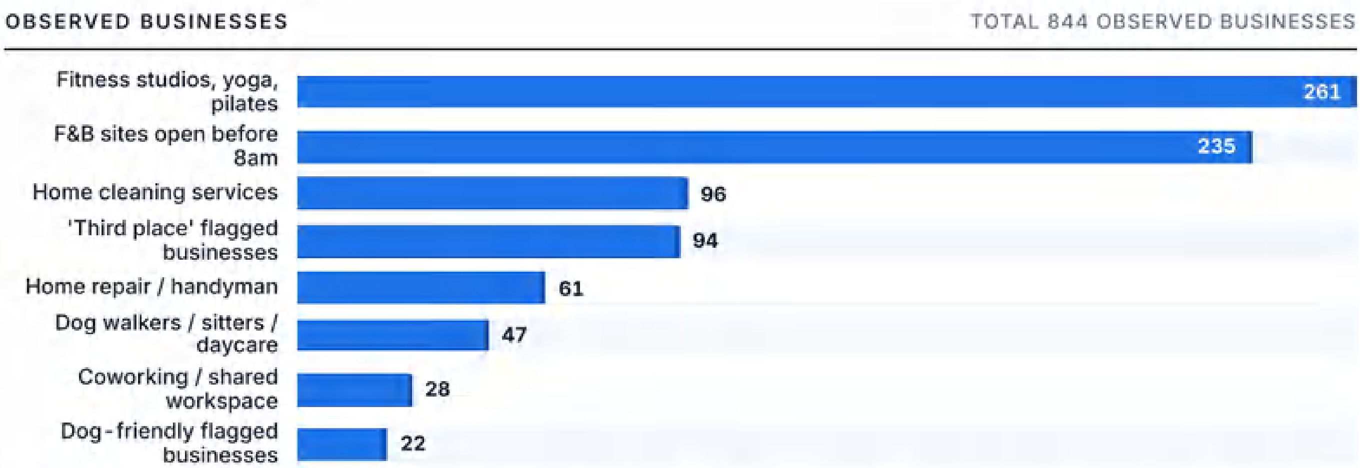
Each test compares a group of residents (from CSO Census 2022) with the businesses likely to serve them (from MAPs). The shared measure across all eight tests is how many residents, households, dwellings or workers each visible business has to serve. A lower number means a better-served area. The eight tests use different units because daily life uses different units. They work as a set of readings, with no single total to add up.

A single-person household for every dozen visible micro-service touchpoints, which is roughly what alignment looks like.



Solo households, hybrid workers and family rhythms, all met by the visible base

Three of the cohort tests come back with a clear functional fit. 18,791 single-person households (28.4% of all households) have 1,621 visible micro-service touchpoints across convenience grocery, pharmacies, dry cleaners and hairdressers. ~60,000 hybrid workers (CSO Place of Work, 43.4% WFH) are met by a parallel rhythm-economy of fitness studios, early-opening cafés, home services, dog-walkers and coworking. And 15,762 children in childcare are served by 210 visible facilities, a ratio of 75 places per business, which is the kind of ratio you'd expect a working sector to produce.

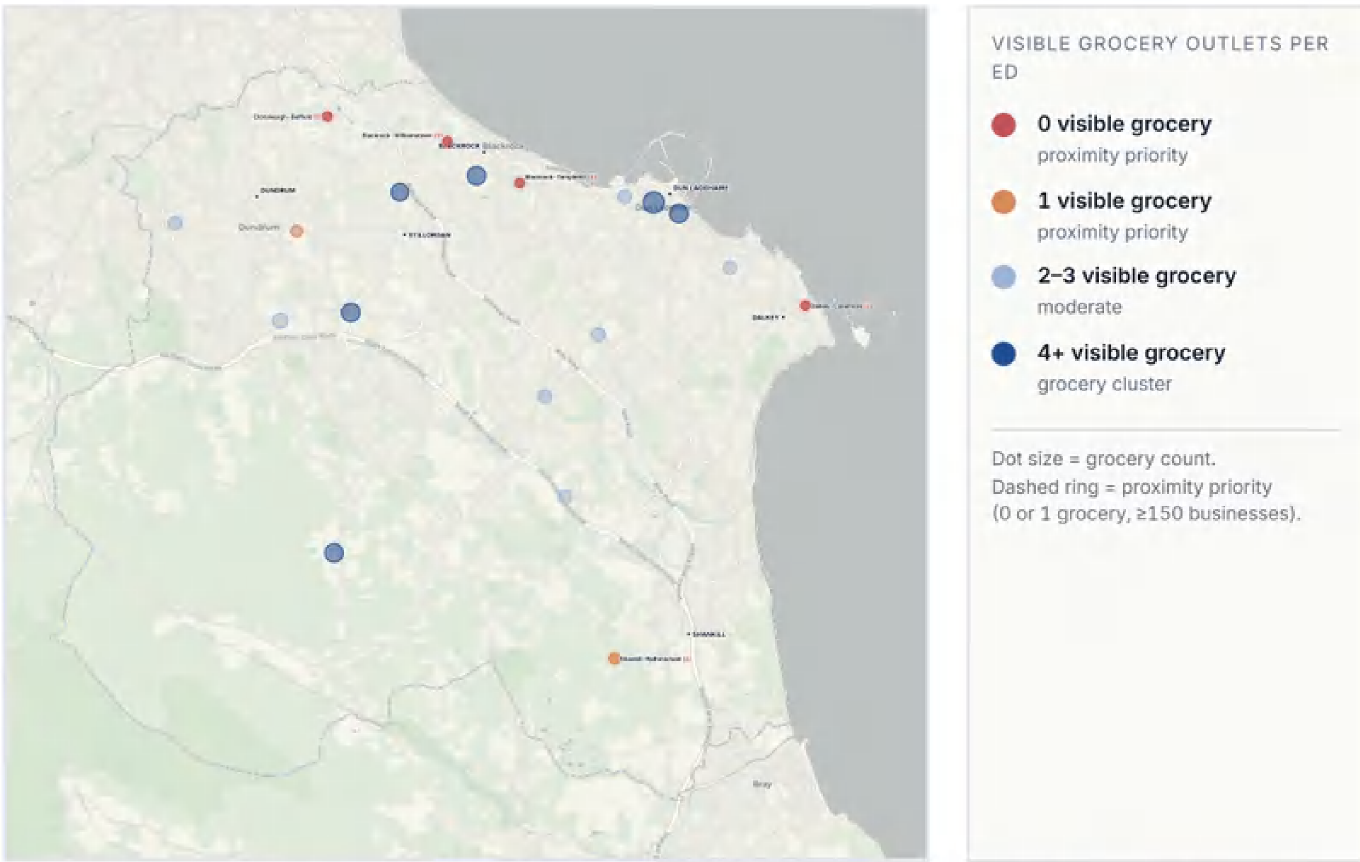


Eight visible micro-segments serving DLR's hybrid-work population. Categories are first-match keyword classifications and may overlap in practice; the totals describe visible capability, not registered capacity.

11,658 carless households are DLR's captive local-spend cohort

DLR's 11,658 carless households (13.7% of all private households) read together with 19,513 mainly-from-home workers and 13,234 walking and cycling commuters define a captive local-spend cohort. Every euro they spend on local services, food, fitness and hospitality stays inside the county. Set against the 35.1% of trading businesses operating across three or more digital channels, this is the natural customer base for click-and-collect, online ordering and home delivery as economic infrastructure.

The proximity test still bites in named places. Six electoral divisions show thin neighbourhood-grocery cover despite carrying at least 150 trading businesses each: Blackrock-Templehill, Blackrock-Williamstown, Dalkey-Coliemore and Clonskeagh-Belfield with none, Shankill-Rathmichael with one, and Dún Laoghaire-Salthill with two. Five of the six sit on the DART line, with Clonskeagh-Belfield the genuinely rail-thin case in the list.



Dot size = visible grocery outlets per ED. Dashed ring marks the carless-cohort proximity priorities — EDs with 0 or 1 visible grocery and ≥150 businesses overall. Centroid placement is the ED geographic centre, not a single store location.

Visible gaps that point to targeted opportunity

49,999 DLR residents report a long-lasting condition or difficulty (21.4% of the population), and 13,610 provide regular unpaid care. The MAPs trading layer shows 71 home-care providers and 79 residential or nursing-home settings, 150 visible private and observed providers between them. HSE-direct community care, public residential beds and informal carers sit alongside this count and are not visible to MAPs, so the real care estate is larger than 150. The visible ratio of 333 disabled persons per private provider remains a useful planning signal. Allied health at 257 reads healthier, and mobility-equipment retail at 37 is the thinnest category.

Disability and Carer ecology · DLR

49,999
DLR residents with a disability (CSO 2022)

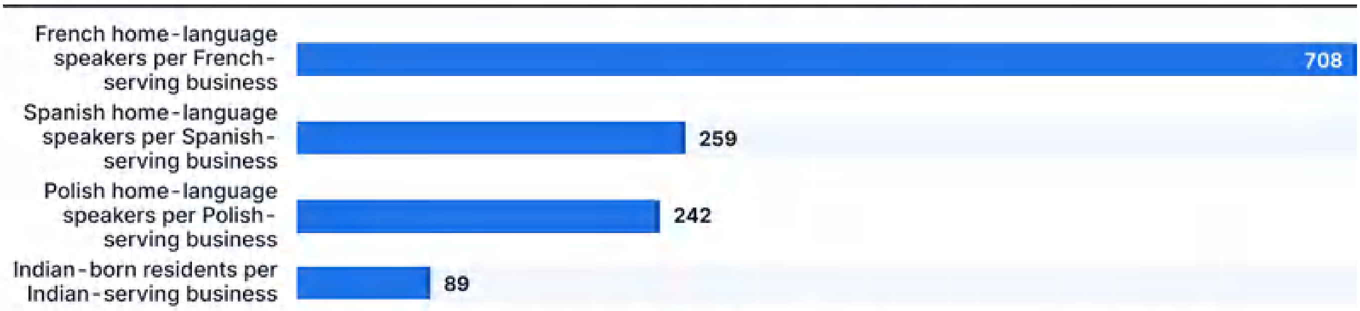
21,672
Carers recorded in CSO 2022

~150
Visible home / residential care providers (MAPs)

333
Persons with a disability per visible care provider

DLR has 42,363 residents speaking a non-English language at home and 3,412 reporting limited English. The MAPs trading layer identifies 196 minority-serving businesses across six tested clusters, with Indian-serving supply the most developed at 89 residents per visible business, Polish at 242, Spanish at 259 and French at 708. The keyword classification picks up food, grocery and wellness more readily than professional services or trades. Merged section 11+12 develops the per-sector multilingual legibility gap (5.1% in healthcare against 12.8% in retail) as the report's headline pressure.

RESIDENTS PER VISIBLE SERVING BUSINESS (LOWER = BETTER-SERVED) TOTAL 1,298 RESIDENTS PER VISIBLE SERVING BUSINESS (LOWER = BETTER-SERVED)



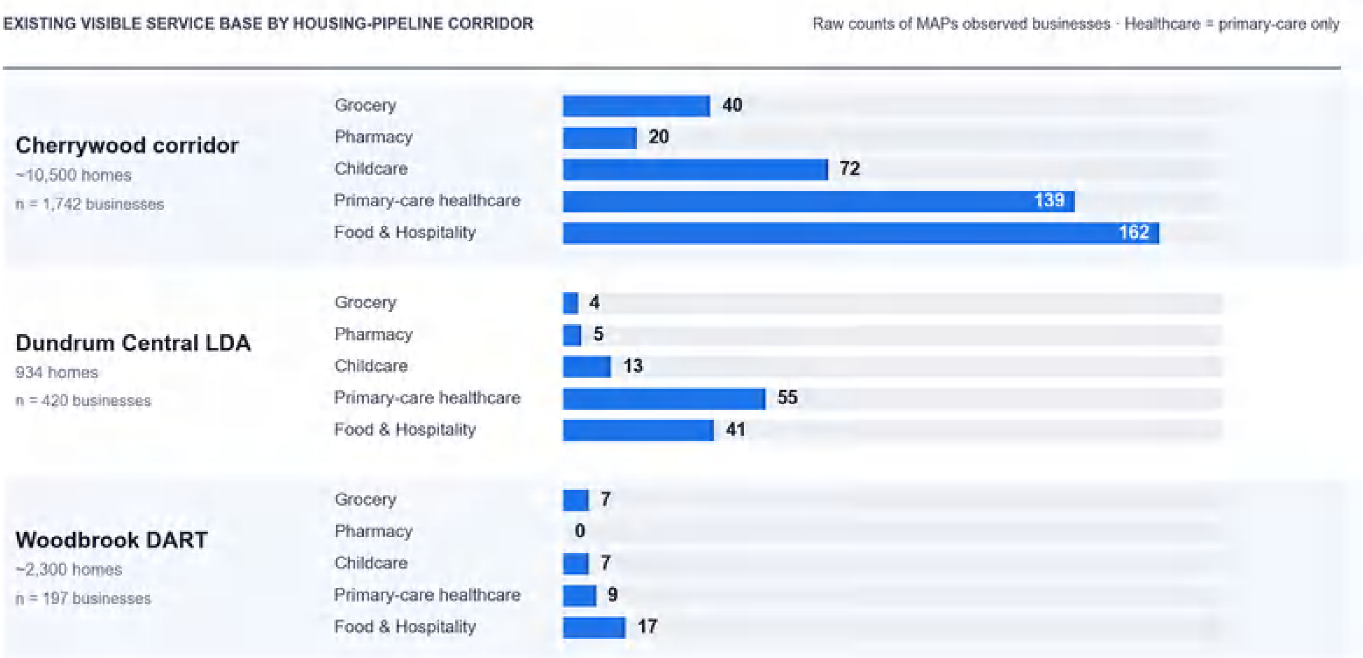
"Community-serving" identified through MAPs keyword classification of business names, descriptions and stated cuisine or language. Many residents will use mainstream businesses; this measures visible community-specific supply, not total addressable supply.

Cultural-fit supply is a thin but real category, and it sits closer to need than headline counts suggest.

Three corridors carrying ~13,700 future homes, with only one already supported by a service base

Three named pipelines together carry roughly 13,700 future homes. Cherrywood (~10,500) sits at the south end of the Sandyford spine and already has a partial service base in place: 11 grocery, 21 pharmacy, 48 childcare, 191 healthcare and wellness, and 177 F&B businesses. Dundrum Central LDA (934) sits inside an existing town-centre ecology served by Dundrum Town Centre. Woodbrook DART (~2,300) is the harder case, with the visible service base in the immediate corridor materially thinner. The 11 visible grocery outlets in Cherrywood, set against ~25,000 expected residents, gives the headline ratio of 2,273 future residents per visible grocery.

The 191 healthcare-and-wellness count combines GPs, dentists, allied health, gyms, beauty and alternative therapies, which is too broad to read as primary-care capacity for new households. A corridor-specific GP and pharmacy subset is the cleaner planning read, and it sits as a follow-up computation. section 9 owns the full pipeline employer geometry.



Healthcare = GPs, medical centres, dental, optometry, audiology, allied health (physio, OT, podiatry), mental health, hospitals. Excludes gyms, yoga, beauty, alternative therapies.

Sized against the corridor totals. Pipeline figures are planning targets, not delivered homes (see Annex A). Source: TradingDetails + geogates point-in-polygon.

Three Pipelines, Three Service Profiles

Cherrywood

~10,500 homes in delivery. Service base partially formed; grocery and pharmacy lag behind population trajectory.

Dundrum Central

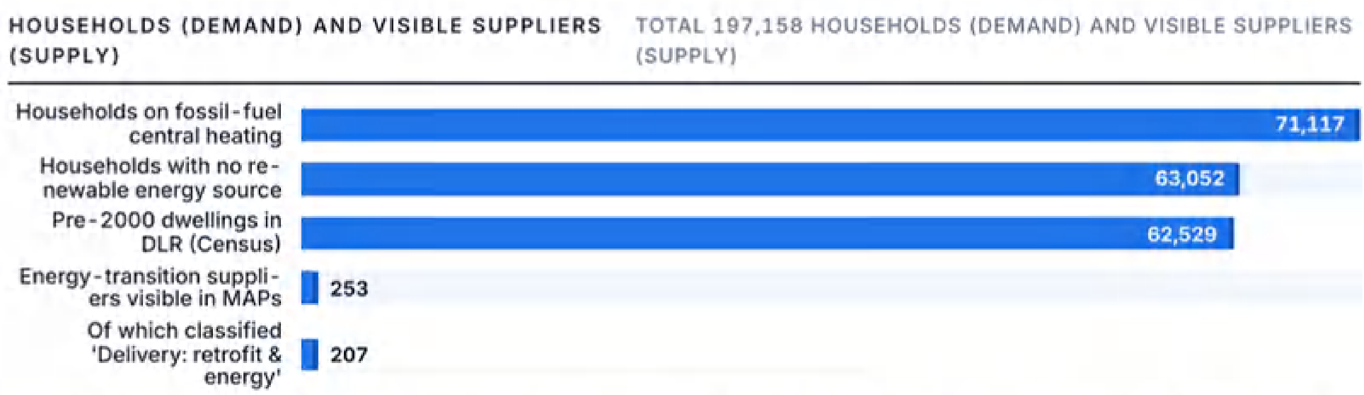
934 homes in an established towncentre with a working service ecology. The mixed-supply case.

Woodbrook DART

~2,300 homes with the thinnest immediate service base. Sequencing of services to homes is the operative question.

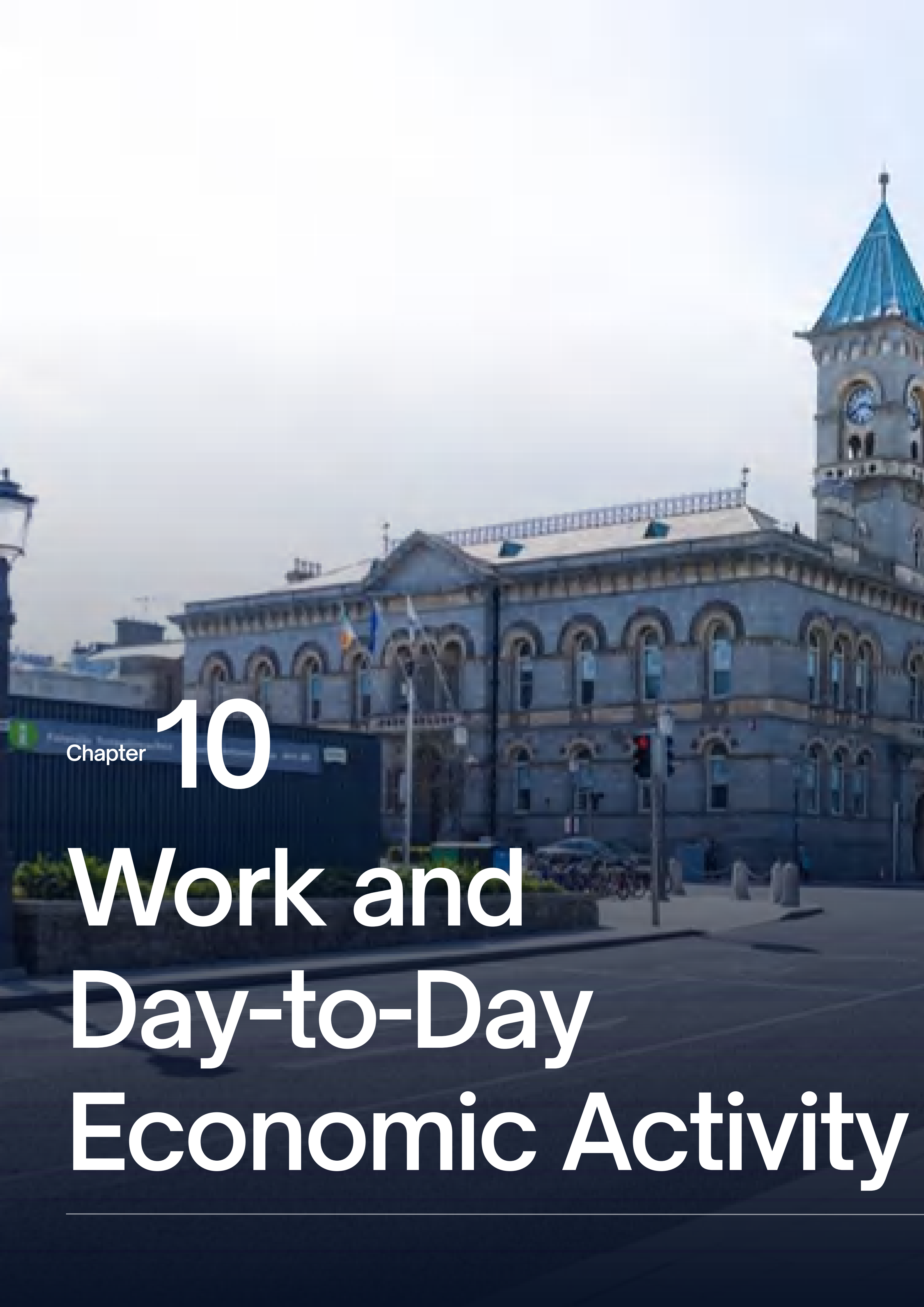
62,529 pre-2000 dwellings against 253 visible suppliers, a c.€2.5bn lifetime market

The retrofit test sits in a different scale class. CSO records 62,529 pre-2000 dwellings, 71,117 fossil-fuel central-heated households and 63,052 with no renewable energy source. MAPs identifies 253 visible energy-transition suppliers, of which 207 are in delivery. At the SEAI median deep-retrofit cost of c.€60k applied to roughly two-thirds of the pre-2000 stock, the indicative addressable market is c.€2.5bn lifetime, or c.€250m per year at a 10%/decade run-rate, by far the largest quantifiable cohort and supply signal in the report. Retrofit is roughly ten times larger than the next-biggest cohort opportunity in this section, and the only one where local supply, local demand, public funding, trades, finance and town-centre SME development converge inside a single market.

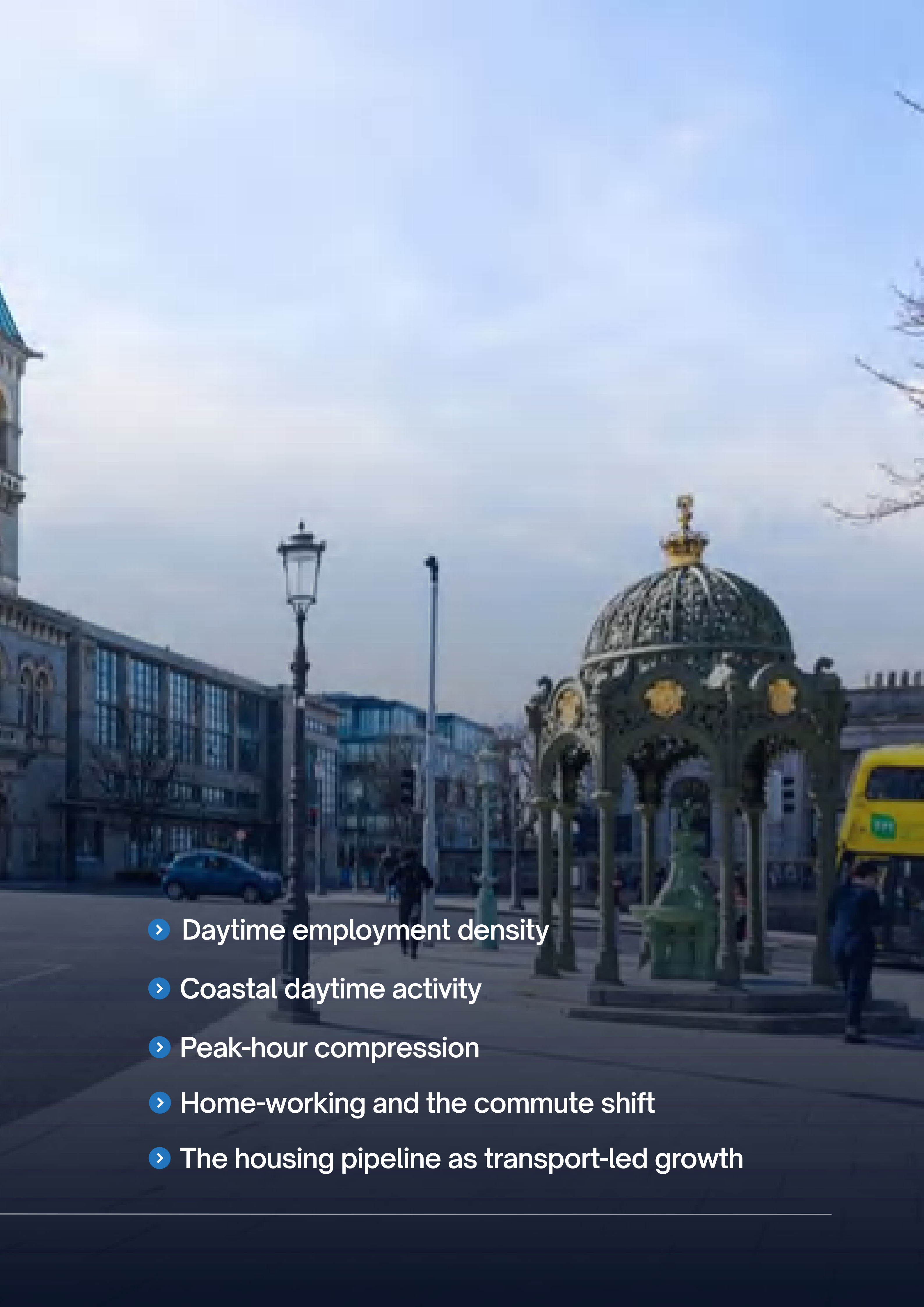


What to remember:

- Single-person households are well-served, at 12 households per visible micro-service business.
- Hybrid workers have a working rhythm-economy across eight micro-segments.
- Children have 210 visible childcare facilities, working out at 75 places per business.
- Carless electoral divisions reveal a proximity gap in five named places.
- Polish, Spanish community-serving supply sits 240+ residents per business.
- 49,999 disabled residents share ~150 home-care providers, working out at 333 residents per provider.
- Cherrywood faces the largest demand-supply ratio: 2,273 future residents per grocery.
- Retrofit is the largest signal in the report, at a c.€2.5bn lifetime market.



Chapter 10 Work and Day-to-Day Economic Activity



- Daytime employment density
- Coastal daytime activity
- Peak-hour compression
- Home-working and the commute shift
- The housing pipeline as transport-led growth

Several working days at once, with a housing wave that lands unevenly on them

DLR's commute peaks hard at 8am while a 56% hybrid base reshapes daytime demand. The next housing wave lands unevenly on that geography.

Half of DLR's daily commute leaves home in a single hour, and car remains the dominant mode. A 56% hybrid base anchors daytime activity inland on the Sandyford spine, while the harbour town runs a second rhythm. Cherrywood housing lands on the existing employment spine; Dundrum Central and Woodbrook are housing-led corridors that will rely on DART, Luas and bus to carry the flows.

Key Findings:

51% of DLR's daily commute leaves home in a single 60-minute window between 7:30 and 8:30. The next housing wave will land on the same hour. Cherrywood meets the existing employment spine; Dundrum Central and Woodbrook are housing-led pipelines off it.

70,602

Commuters leaving home between 7:30 and 8:30, with 51% of all daily flow concentrated in that hour

59,580

DLR resident workers working from home at least sometimes, at 56.6%

42,886

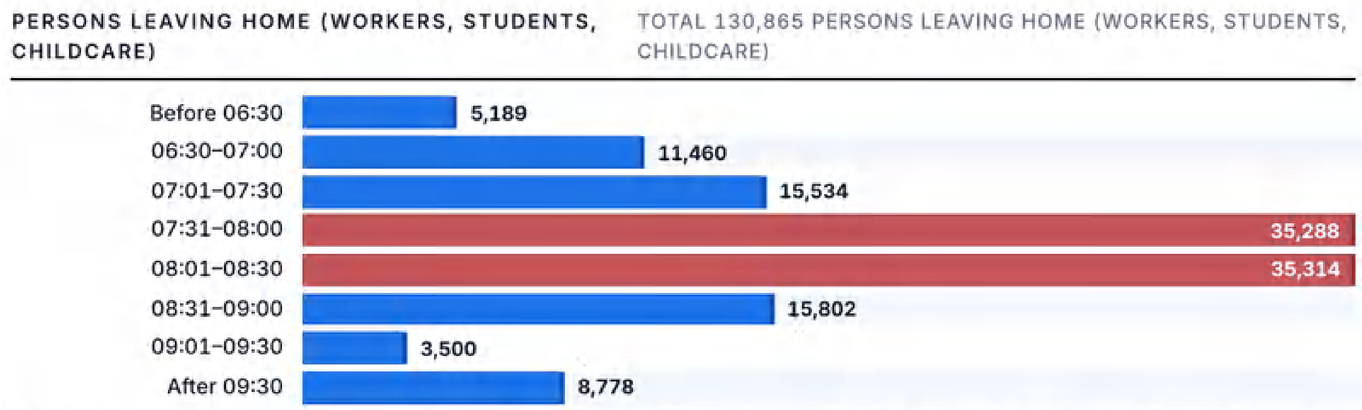
Car-driver commuters, 40.7% of resident workers, still the dominant mode

~13,700

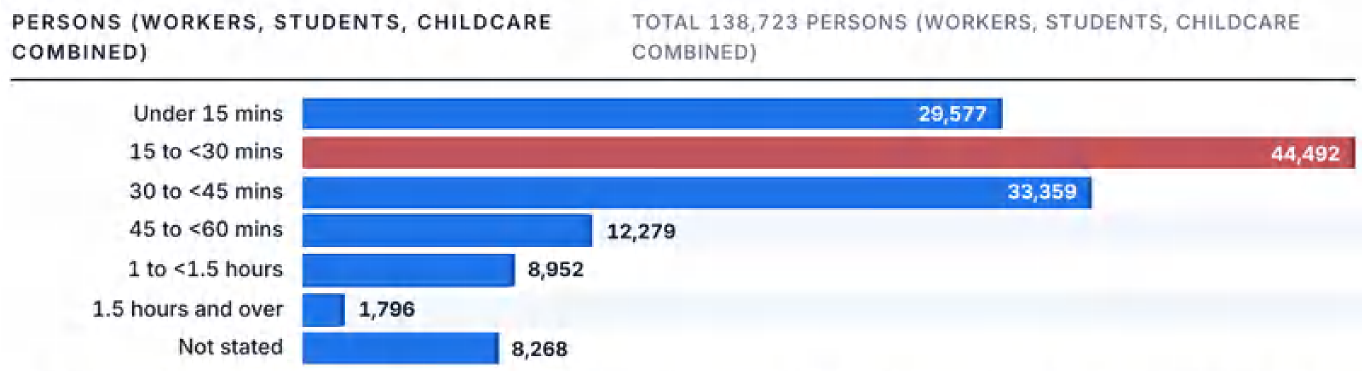
Future homes across three named pipelines: Cherrywood, Dundrum Central and Woodbrook

Half of DLR's daily commute leaves home in a single hour

Census 2022 records that 70,602 of DLR's 138,723 daily commuter departures (workers, students and childcare journeys combined) leave home in the single hour between 7:30 and 8:30. That puts 51% of daily flow inside a 60-minute window. The sharp peak is the load test for the network. A transport system can look adequate across the day and still feel tight at peak hour.



Census 2022 Table T11T2,combined workers, students and childcare departures from home. The post-09:30 bucket (8,778) is small but visible and fits the WFH / hybrid / part-time pattern.

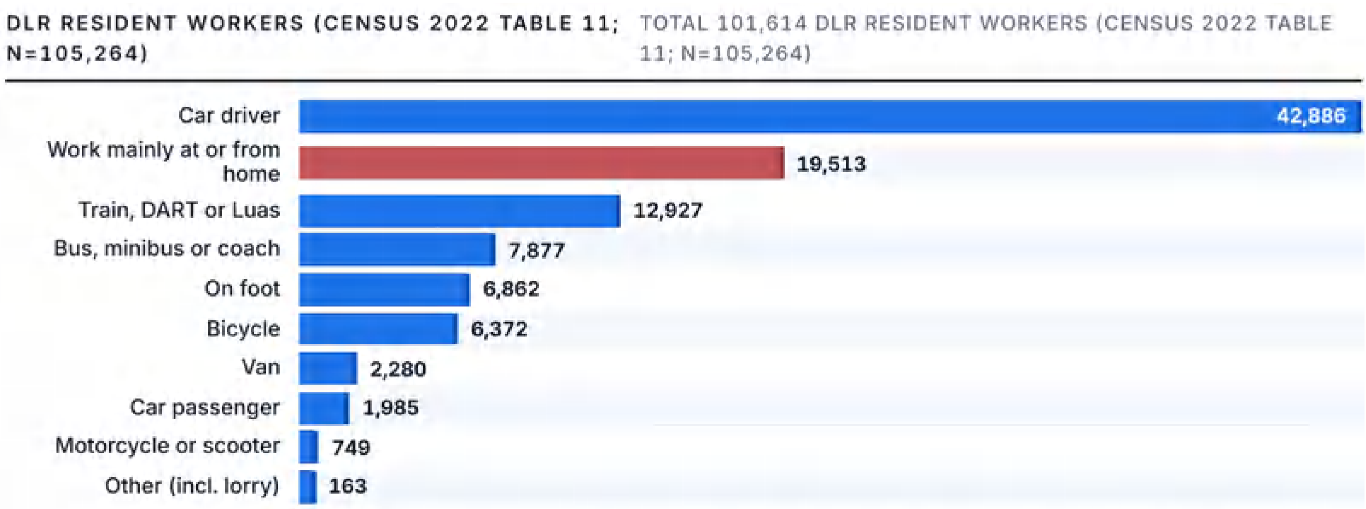


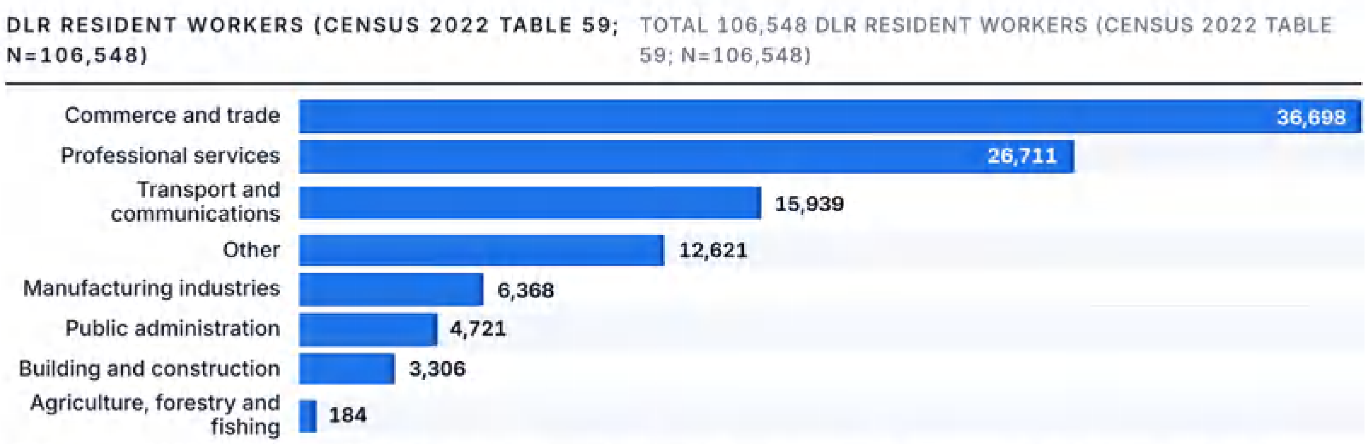
Most daily journeys still finish inside 45 minutes,77% of recorded journeys. The distribution matters as much as the average; the next phase of housing will add pressure at particular points in the network rather than evenly across the county.

Mainly-from-home is now the second largest commute mode in the county

Car driver remains the dominant resident-worker mode at 42,886 of 105,264 workers (40.7%). 19,513 (18.5%) now work mainly from home, ahead of rail (12,927), bus (7,877) and active travel (foot plus bicycle, 13,234).

The wider hybrid base is much larger: 59,580 resident workers (56.6%) work from home at least sometimes per Census Table 50. Three in four resident workers sit in commerce, professional services or transport and communications, the office and knowledge sectors most adapted to home and hybrid work.



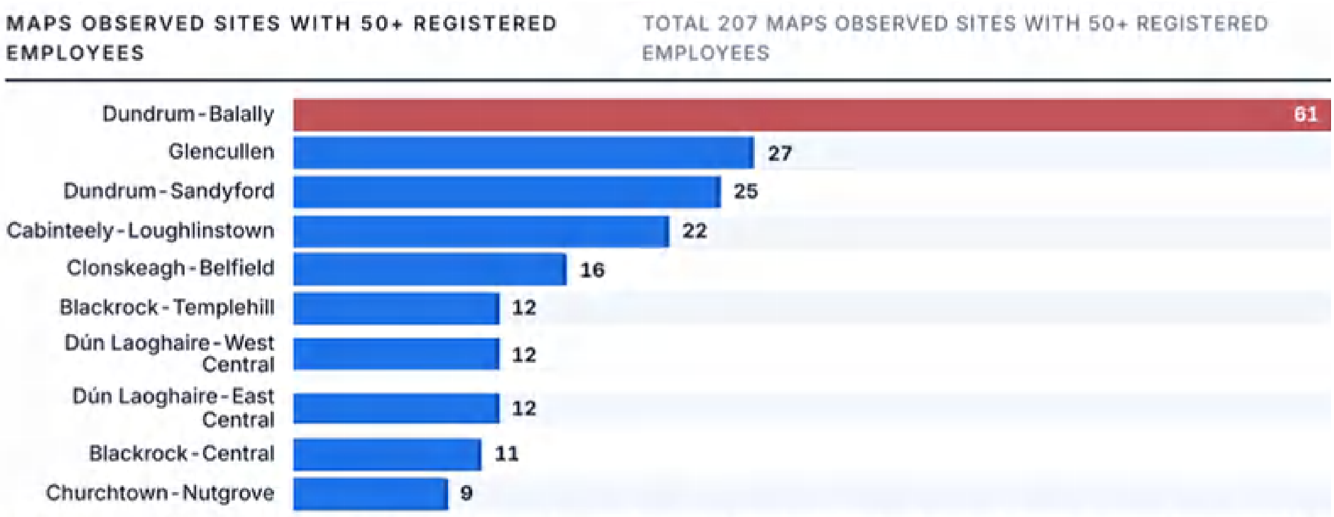


CSO Census 2022 Tables 11 and 59. The industry mix explains the high hybrid share,commerce + professional services + transport/communications together account for nearly 75% of DLR resident workers.

Inland daytime density: Dundrum-Balally carries 61 large-employer sites

Today's daytime employment density sits inland on the Sandyford spine. Dundrum-Balally, the electoral division covering most of Sandyford Business District, carries 61 large-employer sites of 50 or more employees, which is 2.3 times the next electoral division (Glencullen at 27).

The wider Sandyford and Cherrywood employment macro-zone holds 3,485 trading businesses and the highest aggregated registered employee count of any DLR macro-zone at 99,989, ahead of the Dún Laoghaire and Dalkey coast at 1,885 businesses and 93,788 registered employees.



Top 10 Electoral Divisions by count of MAPs observed sites whose linked registered record carries 50+ employees. Dundrum-Balally alone holds 1,737 observed businesses,about one in seven of the entire DLR observed base.

Sandyford / Cherrywood Employment Macro-zone

3,485
Observed businesses in the macro-zone

99,989
Aggregated registered employees (linked MAPs ↔ CRO)

1,737
Observed businesses in Dundrum-Balally alone

2.3×
Dundrum-Balally large-site lead over the next ED

Mainly-from-home is now the second largest commute mode in the county, ahead of rail, bus and active travel.

A harbour-town rhythm that runs from morning coffee to weekend visitor use

A second pole of daytime activity sits on the coast. Its rhythm is closer to a harbour town with a wider economic role than to a business park.

Dún Laoghaire town's four electoral divisions (East Central, West Central, Salthill and Sandycove) hold 1,538 trading businesses, with the two core electoral divisions accounting for 1,162. The town-centre sector lead is Healthcare and Wellness (156), Retail (150) and Food and Hospitality (133).

The evening offer is concentrated in F&B, with 35.8% of town F&B businesses open after 8pm, modestly above the county average. 41% of identified blue-economy businesses sit in the three Dún Laoghaire town electoral divisions, rising to ~56% once Dalkey and Sandycove are added.

Town-Centre Sector Mix - Top 5

Sector	Count
Healthcare & Wellness	156
Retail	150
Food & Hospitality	133
Media, Marketing & Creative	95
Technology & Software	66

MAPs observed businesses across the two core Dún Laoghaire town EDs (East & West Central, n=1,162).

A Second Daytime + Evening Rythm

35.8%
Town-centre F&B open after 8pm

26.2%
Town-centre F&B open Sunday

41%
Blue-economy businesses in 3 town-centre EDs

~56%
Blue-economy share once Dalkey + Sandycove added

The coast runs through morning coffee and commuting, daytime services and marine activity, evening food and hospitality and weekend visitor use.

~13,700 future homes across three corridors, with one landing on the existing employment belt

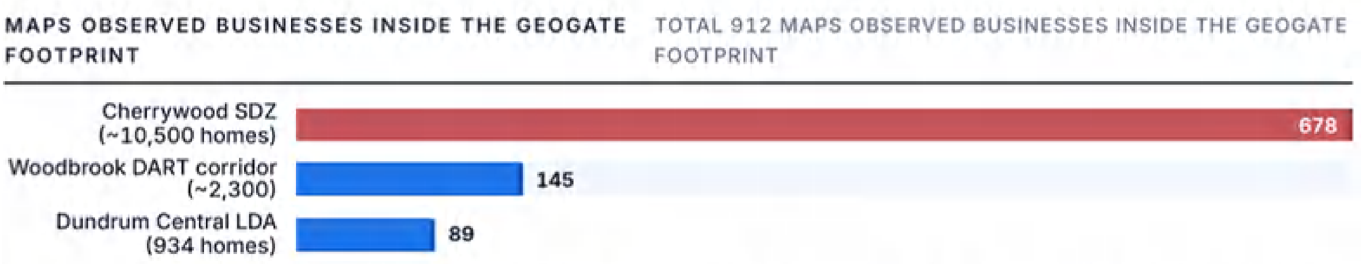
The three named housing pipelines land unevenly on DLR's two-pole geography.

Cherrywood is the case where housing lands directly on the existing employment belt: the SDZ already has 678 trading businesses on its footprint and the corridor carries ~23,421 registered employees, with the Luas Green Line running through it.

Dundrum Central LDA (934 homes) sits beside an established town centre, though the LDA red line itself counts only 89 trading businesses.

Woodbrook DART (~2,300 homes) is the corridor unlocked by the August 2025 station opening, with 145 trading businesses on the immediate footprint today.

Cherrywood is housing on the spine, with Luas, the M50 and an existing employment base already in place.



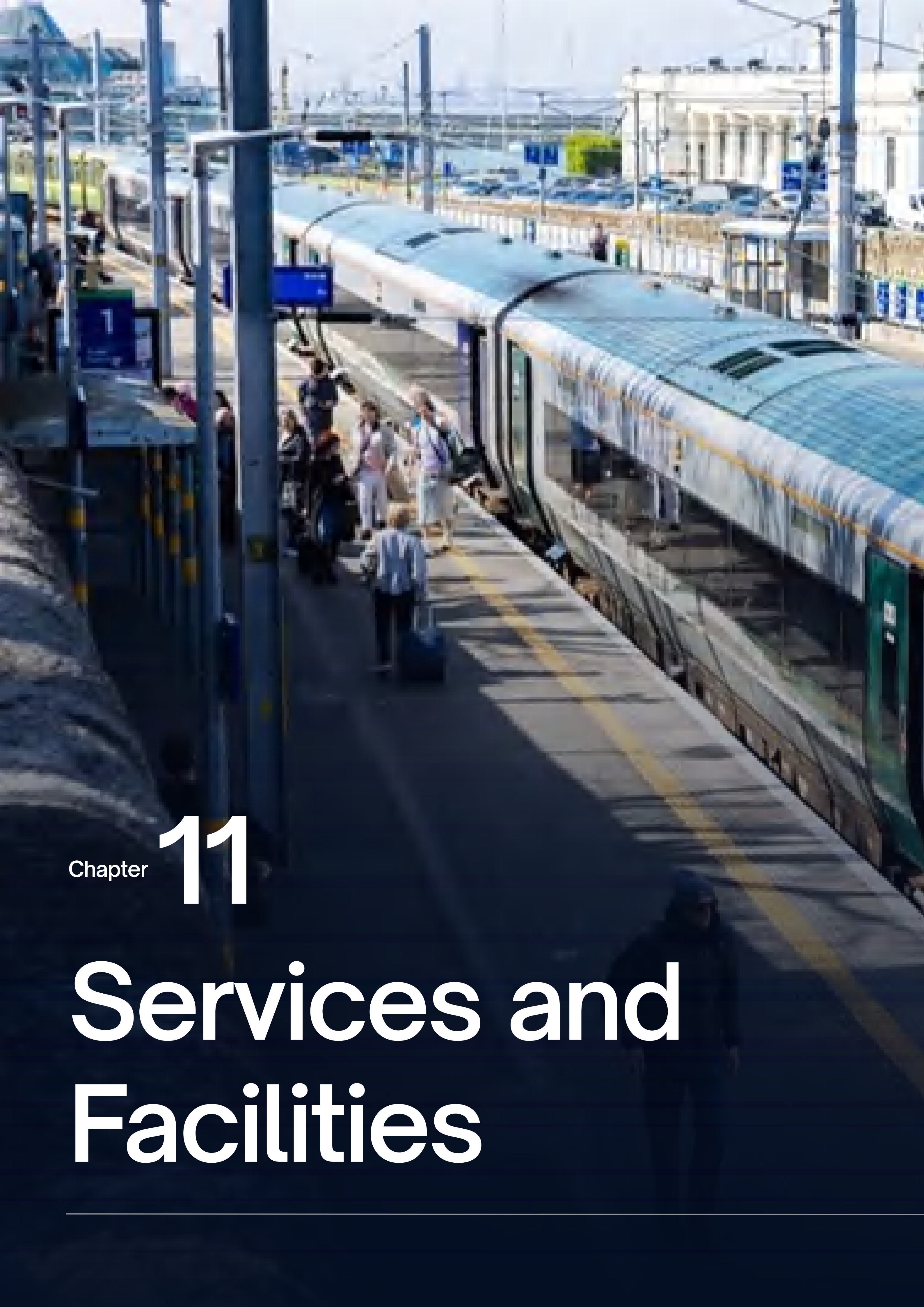
MAPs observed businesses on the geogate footprint of each named pipeline. Service capacity will continue to grow with the pipeline; this is a snapshot of the starting position, not an end-state forecast.

What the three pipelines test:

- Cherrywood: how housing, employment and public-transport-led growth can reinforce each other on the existing employment belt.
- Dundrum Central: how a large new residential community plugs into a town centre, a Luas corridor and nearby employment.
- Woodbrook: how the coastal DART axis can carry new daily flows while building enough local services that not every trip becomes a commute.

Caveats and read

- Commute mode and journey-time figures describe DLR resident workers, not jobs based in DLR. DLR is a major net importer of workers via DART, Luas Green Line and the M50, and that inbound flow isn't measured here.
- Macro-zones are author-defined groupings of electoral divisions, where rank order matters more than precise totals.



Chapter 11

Services and Facilities

- The platform beneath everything
- Schools, childcare and allied health
- Home care and the disability/carer load
- Public realm and active-identity signals

The platform beneath everything

DLR's front-line service estate is substantial. The pressure points are where targeted action would visibly help.

DLR has a strong service base: 210 visible early-years and afterschool facilities serving 15,762 children under 15 in childcare (7,677 aged 0-to-4, 8,085 aged 5-to-14), 117 pharmacies, ~130 primary and secondary schools (DoE), 257 allied-health providers, and 150 home-care or residential providers.

Key Findings:

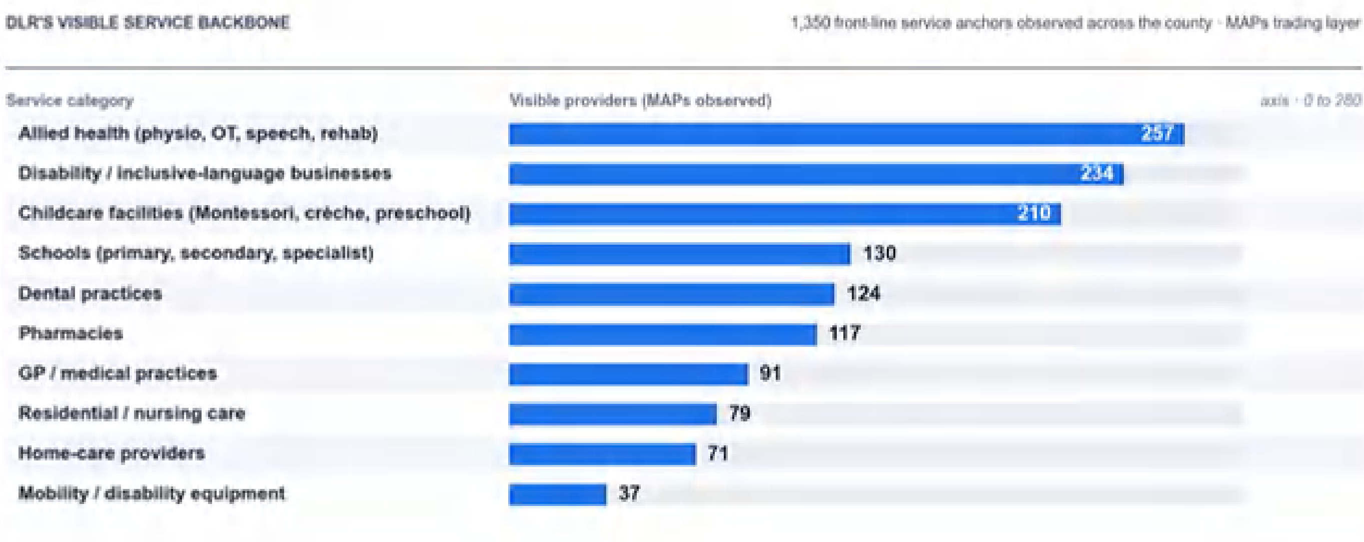
DLR has 210 visible early-years and afterschool facilities serving 15,762 children under 15 in childcare. The pressure isn't where the homes are now. It's where the next 13,734 will be.

130
Schools (primary and secondary) visible across DLR

210
Visible childcare facilities (montessori, crèche, nursery and preschool)

150
Home-care and residential-care providers (71 home care, 79 residential settings)

11,286
DLR women whose principal economic status is "looking after home/family"



Home care is where capacity pressure most clearly converts to a targeted-support route

49,999 DLR residents report at least one long-lasting condition or difficulty (21.4% of population), and 13,610 provide regular unpaid care. The county over-65 population is 39,918, at 17.1% of residents, visibly above the typical Irish county. The 71 home-care providers and 79 residential-care settings come to 150 visible providers, working out at roughly 333 disabled residents per provider.

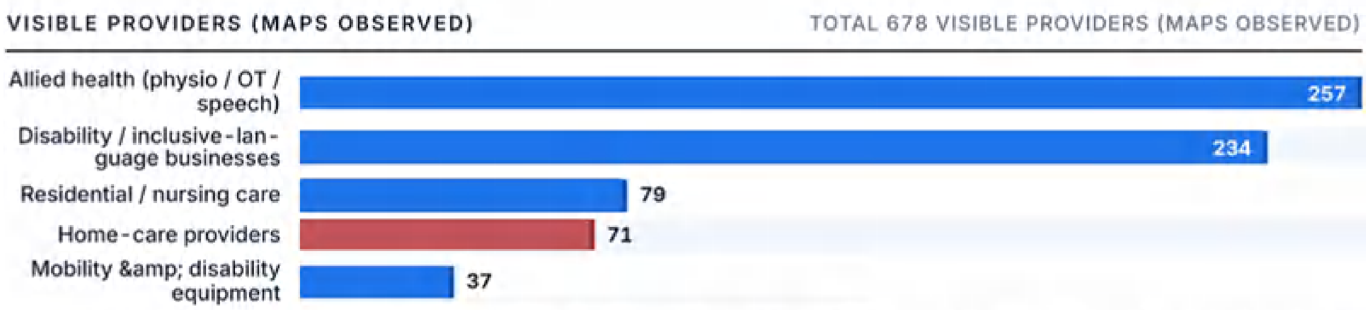
That count covers private and MAPs-observed home-care and residential settings only. HSE-direct community care, public residential beds and informal arrangements sit outside the figure, so the actual care estate in the county is larger than 150. Allied health at 257 reads healthier, although those firms also serve a wider patient base. Mobility-equipment retail at 37 is the thinnest category.

49,999
Residents with a long-lasting condition or difficulty (21.4%)

13,610
DLR residents providing regular unpaid care (8,469 women, 5,141 men)

39,918
Population over 65 (17.1% of residents, visibly above average)

333
Disabled persons per visible home-care or residential-care provider



Allied-health capability supports a broad patient base. Home care, respite, accessible transport and equipment determine whether disabled residents and carers can sustain daily life with less friction,which is why home care is the clearest expansion priority.

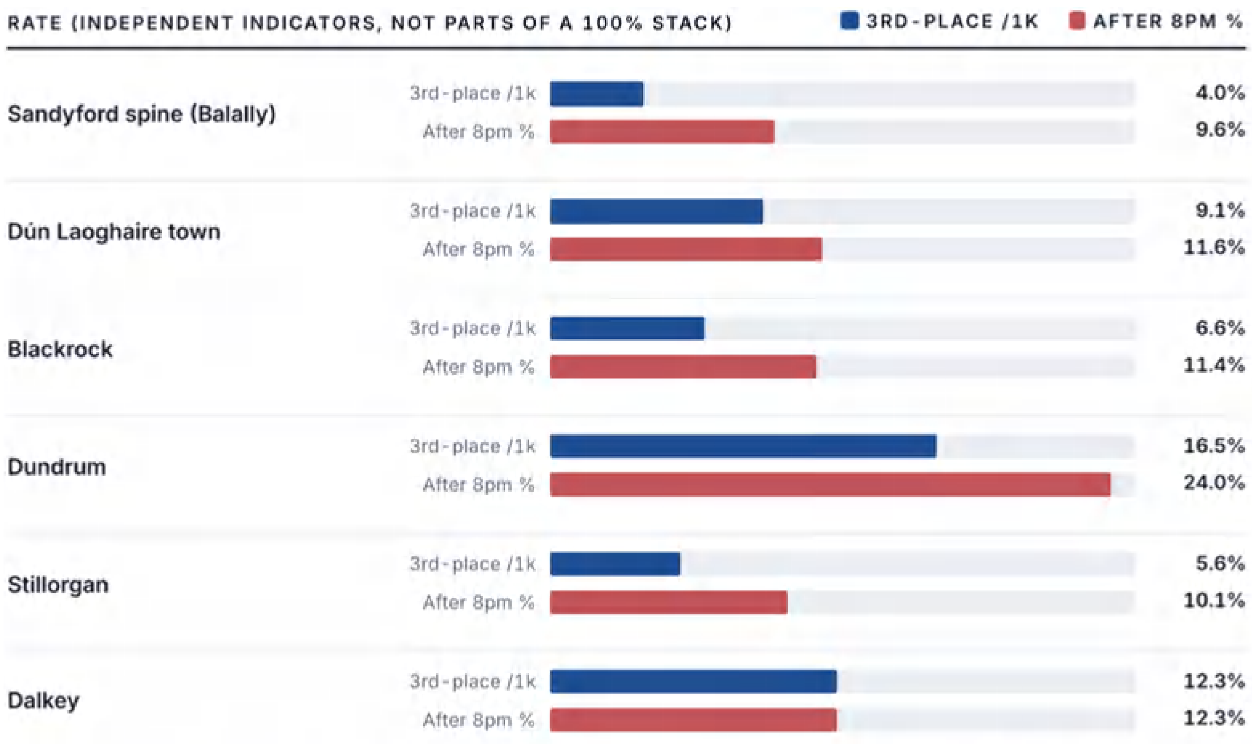
Public realm is service infrastructure

A centre's basics are the same everywhere: benches, walkable streets, safe crossings, evening lighting, accessible toilets, third places and late-opening hospitality. They decide whether the centre works for older residents, families, workers, visitors and people without cars.

The four Dún Laoghaire town electoral divisions hold 1,538 trading businesses. 14 carry the third-place flag and 178 open after 8pm, giving the town a third-place density of 9.1 per 1,000 businesses, more than double Sandyford's 4.0. Within Food and Hospitality specifically, 54.1% of the town's 187 establishments open after 8pm, the operating backbone of the town's Purple Flag accreditation.

The other side of the picture is what businesses themselves say about where they are. Across DLR's trading base, 252 mention the harbour and the piers, 36 reference the Council, 31 carry sponsorship or charity cues, 23 name-check IADT and 7 mention local festivals.

These are the businesses presenting themselves as part of their place. §7 develops the deeper voice-pride layer (per-business voice score and per-village identity work) that sits underneath this public-realm read.



Two independent indicators per centre,third-place flagged businesses per 1,000, and the share open after 8pm. Dundrum tops both because its town centre carries a heavier hospitality and leisure base; Dún Laoghaire reads strongly on third-place density at second place behind Dundrum.

Place Pride Signals - Dún Laoghaire town

1,065 mention "Dún Laoghaire"

252 mention "harbour" or "pier"

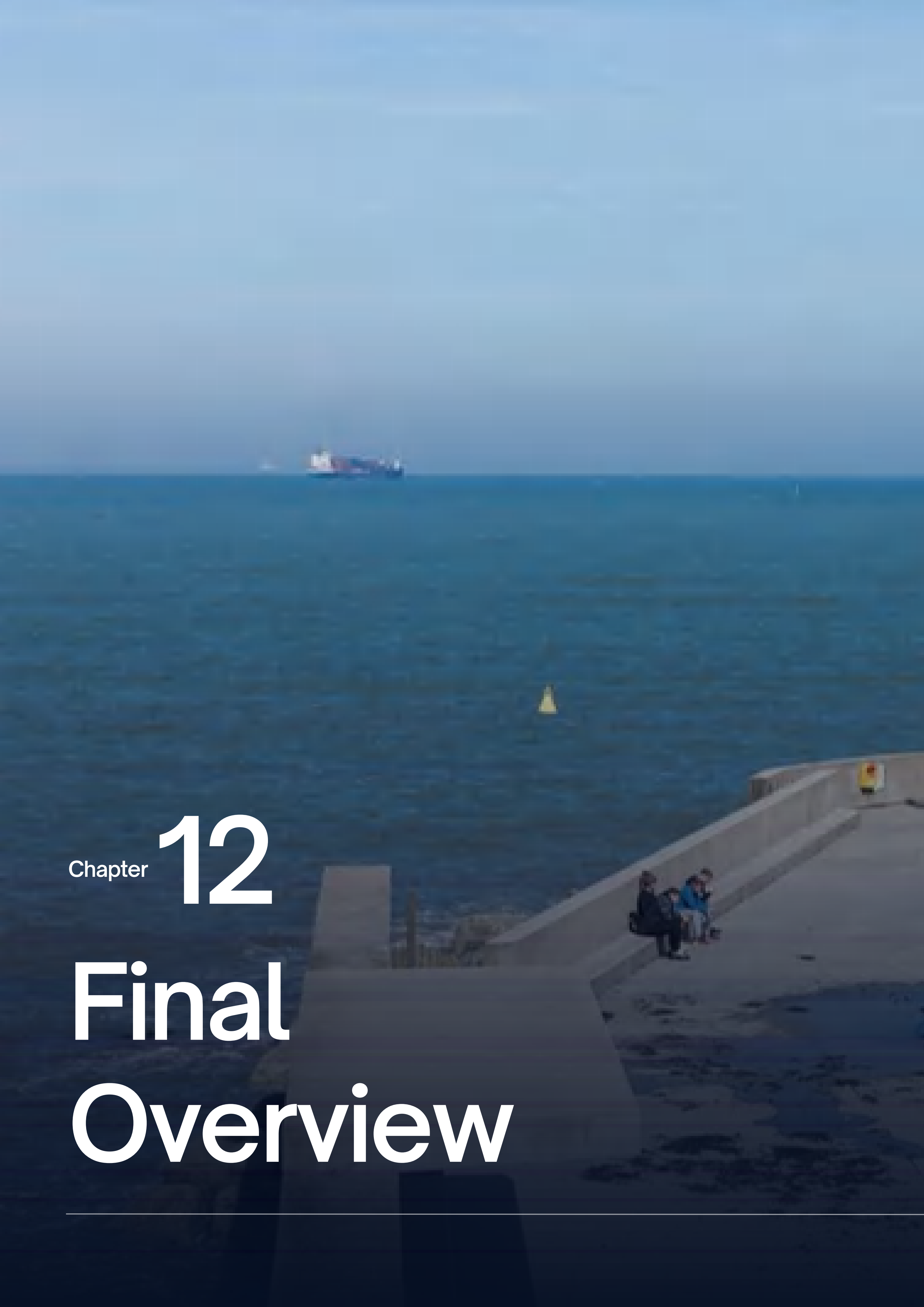
36 mention "Council"

31 sponsorship / charity flag

28 mention "DART"

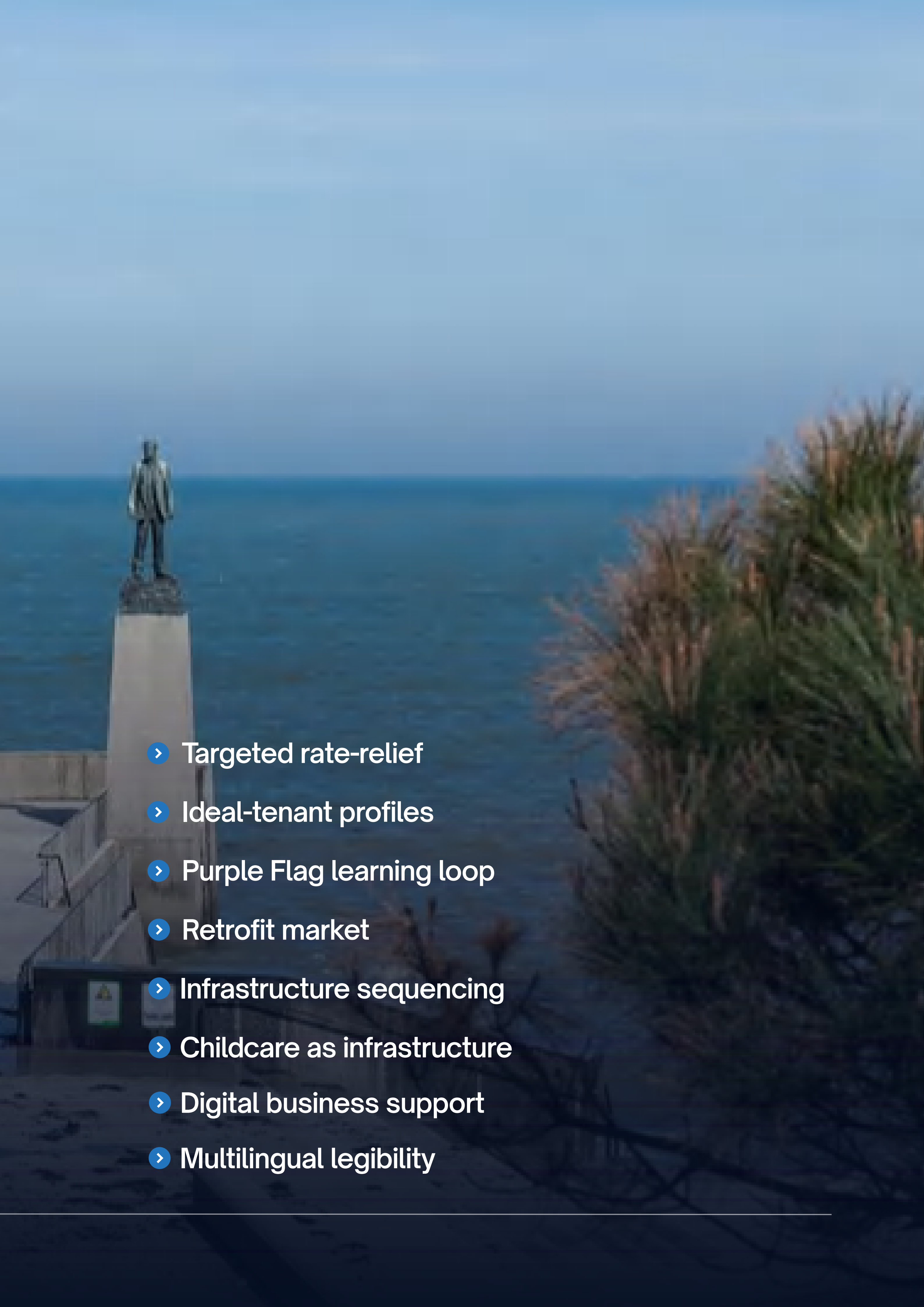
7 festival mentions

Of 1,538 observed businesses across the four DL town EDs. The public-language footprint of place-pride and town-centre stewardship,the partnership texture Section 12 tenanting work picks up.



Chapter 12

Final Overview



- Targeted rate-relief
- Ideal-tenant profiles
- Purple Flag learning loop
- Retrofit market
- Infrastructure sequencing
- Childcare as infrastructure
- Digital business support
- Multilingual legibility

From data to opportunity, read across the county

DLR works as an active local economy with two poles.

Inland, the Sandyford employment belt holds the tech, healthcare and professional services cluster, tied into the Luas Green Line. On the coast, Dún Laoghaire functions as the harbour town, with its 2026 Purple Flag accreditation and a real evening offer. Between the two sit Blackrock, Stillorgan, Dundrum and the Cabinteely-Carrickmines retail-park arc, each with its own rhythm.

Underneath sit 17,896 registered entities, 12,087 visibly trading businesses and 233,860 residents, a strong base with specific pressures. Eight action areas read directly off the data.

17,896
Registered Entities

12,087
Visibly trading businesses

233,860
Residents

8 action areas read directly off the data:

1 Targeted rate-relief

Chamber instruments against 160 trading-SME stress sites

Trading-SME stress in DLR is concentrated, with the sharpest signal in Beauty and Personal Care, Retail and Food and Hospitality, the categories rate-relief discussions tend to centre on.

The 160 visibly stressed sites cluster along three named arcs: the Sandyford employment belt, the Blackrock corridor, and the Cabinteely-Carrickmines retail-park arc. That gives rate-relief work a clear targeting geography.

The opportunity is to move from county-wide instruments to Chamber-led tools that put a named place behind every euro spent.

2 Ideal-tenant profiles

Five centre-specific attraction strategies

DLR's principal centres each carry a different operating signature. Dundrum reads as a destination retail and leisure hub, and Dún Laoghaire town runs as a working harbour town with a real evening offer. Blackrock-Stillorgan trades strongly online and on the high street. Sandyford anchors the daytime employment economy. Dalkey is the coastal village. Treating them as one would flatten what makes each one work.

The opportunity is to write five centre-specific ideal-tenant profiles, one for each, so landlord conversations, vacancy work and Chamber tenanting sit on a documented brief instead of a generic one.

3 Purple Flag learning loop

Stewardship lessons travel; the accreditation does not

Dún Laoghaire town's 2026 Purple Flag accreditation is real evidence that the county can run an evening economy on partnership. Council, Chamber, An Garda Síochána, hospitality operators, transport providers and residents' groups already pull in the same direction. Dundrum, Stillorgan, Blackrock and Sandyford each have the bones of a similar case,Council relationship, hospitality core, transport interchange, residents' base.

The opportunity is structural: the stewardship lessons travel even where the accreditation does not. A Purple Flag learning loop applies that partnership texture across the four other principal centres, one centre at a time.

4 Retro-fit market

Local demand, local delivery

62,529 pre-2000 DLR dwellings sit against 253 visible energy-transition suppliers, a c.€2.5bn lifetime market and the largest quantifiable signal in the report. The opportunity is supplier development with the 207-firm delivery cohort, paired with street-level demand aggregation.

5 Infrastructure Sequencing

Connect homes, jobs and services

Cherrywood lands directly on the existing employment belt, while Dundrum Central LDA and Woodbrook DART need their service base to grow with delivery. The opportunity is treating the employment belt and the housing wave as a single sequencing question across all three corridors.

6 Childcare as infrastructure

11,286 women, 75 children per visible facility

Childcare in DLR works for the population it serves today. The pressure isn't where the homes are now,it's where the next 13,734 will be. The visible facility base meets existing demand at a working ratio, and 11,286 DLR women already give "looking after home/family" as their principal economic status, a labour-participation signal sitting underneath any childcare conversation.

The opportunity is to treat childcare capacity as economic infrastructure on the same footing as transport and digital, sequenced into the Cherrywood, Dundrum Central and Woodbrook pipelines before the residents arrive rather than after.

7 Digital business support

Basic → Intermediate is the decisive step

Most DLR businesses are already online, and over half operate above basic digital sophistication,sitting roughly in line with the EU baseline measured against the Digital Decade target of 90% of SMEs at basic digital intensity by 2030. The headroom sits with the Basic-tier and no-website firms, concentrated in town-centre hospitality and SME service categories, where the move to Intermediate unlocks discovery, booking and online trading,and counts directly toward the 2030 target. A small but visible AI cluster anchored in Technology & Software is the next lift above, reading against the parallel 2030 target on cloud, AI and big-data uptake.

The opportunity is a Basic-to-Intermediate support programme that takes roughly five thousand addressable firms one tier up the ladder,operating dividends and policy alignment in the same move.

8 Multilingual legibility

Healthcare, Pro Services, Education thinnest

Roughly a quarter of DLR's residents are overseas-born, and a sizeable cohort speaks a non-English language at home or reports limited English. The trading layer that serves them is real but incomplete,retail meets demand more readily than healthcare, professional services or education. The legibility gap is sharpest where it matters most: healthcare in particular sits well below the retail benchmark on multilingual content.

The opportunity is targeted multilingual support for those three thinnest categories, so visible supply moves into line with the resident demand already in place.

What this all adds up to

DLR is a county already positioned to act. Its residents are engaged, educated and well-served, and excellence is the visible norm rather than the exception across the trading economy.

The operating base runs deep, businesses that have been trading for more than a century sit on the same register as the firms most ready to scale next. The opportunities ahead are real, sized, and within reach.

The action areas don't ask DLR to be something it isn't. They lay out routes the data has already drawn, each one sized to an instrument the county already has.

Closing the picture

This report set out to give Dún Laoghaire-Rathdown a clearer view of its own economy. It was built for the people who already work inside that economy day-to-day: the Chamber, the Council, the businesses, the community groups, the partners who shape what the county becomes next. The aim was to put a working evidence base in front of them, in a form they could use directly.

The approach has been deliberately practical. By reading the registered, the trading and the resident lenses together, the report tries to surface what each one can show that the others cannot, and to make the picture between them more visible than any single source on its own.

The work has been collaborative throughout. The Chamber set the questions that mattered, and Sunstone brought the data infrastructure and the methodological approach to answer them. The wider partnerships across DLR have provided the context and texture that this kind of work depends on. The picture that has emerged is one we hope feels recognisable to people who already know the county, while bringing some of the less visible parts of its economy into clearer view.

The hope is that this report supports the next stage of that work. Each part of it is meant to be useful, drawn at a level of detail where decisions can be taken and action can follow. Where it raises questions the data cannot fully answer, those questions are flagged honestly, in the spirit of work continuing rather than finishing. We look forward to seeing where DLR takes it from here.

"Dun Laoghaire Rathdown is a wonderful place. Rich, vibrant, and steeped in history.

Cycling the Metals with my family the other day, I could see centuries of life and commerce in one stretch: from the bold (ultimately unsuccessful) Atmospheric Railway, the AI of its day, to the ancient quarrying that built the literal foundations of our society.

I marvelled at the Dun Laoghaire Piers, thinking of the toil it took to haul stone from Dalkey Quarry to create safe harbour and connect us to trade across the sea.

To me, the Piers represent ingenuity, vision, and the conviction to build towards a future. A future the people who came before us made real, and that we now get to share. Thousands of lives, decade after decade, providing for their families and becoming part of the story of our town.

My fascination with economics comes from these coastal villages. I grew up in Glasthule and watched Dalkey transform from a small fishing village into one of Ireland's most sought-after destinations.

The sleepy Glasthule of my childhood would scarcely recognise its lively, music-filled streets today.

Now I get the chance to work with the Dun Laoghaire Rathdown Chamber of Commerce, under the fabulous leadership of Colette O'Sullivan.

There's a new energy in the Chamber, and this report shows a clear need for a great place to do business. I believe the Chamber is that place.

Working with Colette, I get to point the lens of Sunstone at my own hometown.

I've tried to recall every business I've worked at here over the years: Walter's (where I met my wife, both of us on duty!), the Royal Marine Hotel, Outlaws (sadly missed), eTailor, Music City, McDonagh's in Dalkey, Advance Vision, and Bloomfields Food Hall. To the people and guests of Dun Laoghaire, I've served delicious meals, creamy pints, cheese, websites, CDs, video rentals, landscape gardening, and fish.

Now I get to serve the very finest data.

I'm so proud of this place."

Roger Courtney

Founder and CEO, Sunstone

Glossary of terms

Glossary Terms: A-D

- Abridged accounts: A simplified set of statutory accounts that small companies can file with the CRO instead of full accounts. They typically omit a profit-and-loss statement, which is why turnover often has to be estimated for these firms (see Implied turnover).
- Active-identity signals: The public-facing language businesses use to identify with where they sit, including mentions of local landmarks, Council references, sponsorship cues, festival markers and named cultural institutions. Read alongside the voice pride score in §7 and §10 as a complementary place-attachment signal.
- Aggregated registered employee count: The total reported employees across all CRO-registered entities in a defined area. Used as a high-level scale measure for the Sandyford-Cherrywood employment belt and other macro-zones.
- Allied health: Health professionals working alongside doctors and nurses, including physiotherapists, occupational therapists, speech and language therapists, dietitians and similar regulated professions. The report counts 257 allied-health businesses across DLR.
- Anchor: A business or institution that defines the character and economic gravity of a place. Beacon Hospital and the Blackrock Clinic anchor DLR's two largest private-medicine sites; IADT anchors the creative cluster.
- Bangor corridor: The cross-border partnership between DLR Chamber and Bangor (Northern Ireland), part of the Shared Island Economic Corridor framework. The 187 DLR-registered entities with UK ultimate parents form the empirical base for that corridor work.
- BER (Building Energy Rating): Ireland's official energy efficiency rating for buildings, scored A to G. The National Retrofit Plan targets bringing pre-2000 dwellings to BER B2 or above through deep retrofit.
- Blue economy: The cluster of businesses operating in seafood and fisheries, sailing and boating, harbour and maritime operations, watersports and sea-swim, and marine science. The MAPS view captures 178 visible blue-economy businesses across DLR.
- Captive local-spend cohort: The combined group of carless households, mainly-from-home workers and walking and cycling commuters whose daily economic activity stays inside the county by physical necessity. Their spending on local services, food, fitness and hospitality is geographically captured.
- Census 2022: Ireland's most recent national census, conducted on 3 April 2022 by the Central Statistics Office (CSO). It covers usually-resident population, household structure, work, language, qualifications and other demographic indicators.
- Channel multiplicity: The number of distinct digital channels a business operates across (website, LinkedIn, Maps reviews, e-commerce platform). 35.1% of DLR trading businesses operate across three or more digital channels.
- Composite score: A multi-dimensional score combining several indicators into a single rating. The digital sophistication ladder is built from a twelve-point composite covering content management, e-commerce, booking, analytics, payment tooling, AI and internationalisation.
- County Development Plan (CDP): The statutory six-year plan setting out a local authority's land use and development strategy. The current DLR CDP runs to 2028, with the post-2028 ten-year CDP likely to require zoning for additional units.
- CRO (Companies Registration Office): Ireland's statutory register of companies. The report's CRO view holds 17,896 legal entities attached to DLR addresses, including holding companies, property vehicles and professional-service registrations.
- CSO (Central Statistics Office): Ireland's national statistics body, source of Census 2022 data.
- Current ratio: A standard accounting measure of short-term liquidity, calculated as current assets divided by current liabilities. A current ratio under 1 indicates short-term obligations exceed current assets.
- Customer voice: The fourth analytical layer inside the MAPS trading view, derived from public Google Maps reviews. DLR's customer voice captures 3,733 rated businesses, 355,587 reviews and a 4.8-star median rating, with a 5-star independent cohort of 456 businesses sitting inside that base.
- DART (Dublin Area Rapid Transit): The electrified suburban rail line running along Dublin's coast, including the harbour-town stretch through DLR. Woodbrook DART station opened in August 2025.
- Daytime economy: The economic activity present in a place during working hours, distinct from evening trade or residential consumption. The Sandyford-Cherrywood employment belt anchors DLR's largest daytime economy.
- Demand units per business: The shared measure across the eight cohort and supply tests in §9. Different units (people, households, dwellings, workers) sit on a single ratio so areas can be compared on how many of each demand type each visible business has to serve. A lower number means a better-served area.

Glossary Terms: D-I

- Diaspora-economy footprint: The 3,401-business cluster across DLR carrying at least one diaspora-economy marker, whether through ownership cues, language signals, named overseas connections or sector concentrations associated with diaspora trade. Indicative supply-side participation, not a founder-origin count.
- Directional signal: A measure read for the rough scale or direction it points to, without claiming precision at the entity level. The retrofit demand-supply ratio of 247 dwellings per visible supplier is a directional signal at the county scale.
- DoE (Department of Education): Ireland's government department for education, source of the ~130 primary and secondary schools count used in the report.
- Dual stress signal: A combined indicator of trading-SME financial pressure: a current ratio under 1 alongside negative net worth on the same registered record.
- Electoral division: The small statutory areas the CSO uses for census breakdowns. DLR contains 69 electoral divisions; MAPS assigns trading businesses across them to give the report its working spatial geography.
- Employment belt: The inland Sandyford-Cherrywood corridor running along the Luas Green Line, holding DLR's largest concentration of trading businesses and registered employees.
- Energy-transition suppliers: Businesses operating in solar, heat pumps, retrofit, insulation, EV charging, energy efficiency and renewables. The MAPS view captures 253 visible energy-transition suppliers across DLR.
- EU Digital Decade: The European Union's policy framework setting digital targets to 2030, including a 90% target for SMEs reaching basic digital intensity. DLR's digital base sits comfortably past that basic floor.
- Excellent-share: The proportion of a place's rated businesses sitting at 4.7 stars or higher. Used as a quality indicator, with Dalkey, Sandycove and Dún Laoghaire town leading by excellent-share.
- First-match-wins keyword classification: The MAPS classification approach where each business is assigned to a single primary category based on the first matching keyword found in its public-facing text. Buckets are mutually exclusive, which can understate the breadth of capability for individual firms operating across multiple categories.
- Floor figure: A count understood to understate the true total because of methodology limits. The report flags several MAPS-derived figures as floors, including the 909-business private-medicine cluster.
- Footfall proxy: A measure used in place of direct footfall counts, since shop-level footfall data is not publicly available. The report uses total Google Maps review volume per centre as a footfall proxy.
- Geogate: A defined corridor footprint (typically a housing pipeline corridor) that may overlap with adjacent electoral divisions. The report counts businesses inside each geogate without double-counting overlaps.
- Heritage cohort: The 365 DLR-registered entities incorporated before 1980, 878 before 1990, and 2,044 before 2000. Includes still-trading firms such as Smurfit Kappa Ireland (1898), Heitons (1896), Findlaters (1904) and Chadwicks (1909).
- HSE (Health Service Executive): Ireland's public health service. HSE-direct community care, public residential beds and informal arrangements sit outside the MAPS view, so visible care provider counts are floor figures.
- Hybrid worker: A resident worker who works some of the week from home and some from a workplace. The report identifies ~60,000 hybrid workers across DLR, with 43.4% of resident workers reporting working from home at least sometimes.
- IADT (Institute of Art, Design and Technology): DLR-based higher education institution in Dún Laoghaire-Sallynoggin West, anchoring the county's education-led creative cluster. Includes the National Film School at IADT and the Media Cube business incubator.
- Ideal-tenant profile: A documented brief describing the type of business that best fits a specific town centre's economic and social character. The report flags ideal-tenant profiles as the next step for landlord conversations and Chamber tenanting work.
- Implied turnover: Sunstone's model that approximates annualised turnover for companies filing abridged accounts, derived from receivables, debtor days and other balance-sheet information. Used where reported P&L turnover is not available.

Glossary Terms: I-P

- Inactive-signal rate: The share of trading businesses in a given area carrying no detectable website, Maps reviews or LinkedIn footprint. Used in the report as the closest available proxy for shopfront vacancy, since DLR doesn't publish a vacancy register.
- Inferential signal: A signal derived indirectly from data rather than reported directly by the entity itself. The dual stress signal is inferential; firms don't declare distress, but the combination of current ratio under 1 and negative net worth is read off their accounts as a stress indicator.
- LDA (Land Development Agency): Ireland's state agency responsible for activating public-sector land for housing. The Dundrum Central LDA site is the former Central Mental Hospital site, with 934 planned homes.
- LEO (Local Enterprise Office): Ireland's first-stop shop for small business support, working alongside Chamber and SEAI on enterprise development.
- Live hiring footprint: The 33 DLR businesses actively advertising open roles on their own websites or LinkedIn pages, plus a wider 114-business cohort carrying live-hiring signals such as careers pages or recruiter contacts. Indicative because most hiring runs through job boards not surfaced in the MAPS scrape.
- Luas: Dublin's tram network. The Green Line runs through Dundrum, Sandyford and Cherrywood, anchoring DLR's inland employment belt.
- Macro-zones: Author-defined groupings of electoral divisions used in the report to read the county at a higher spatial level. Rank order matters more than precise totals.
- Mainly-from-home: The CSO Census 2022 commute mode covering residents who report working from home most of the time. 19,513 DLR resident workers (18.5%) record mainly-from-home, the second-largest commute mode after car drivers.
- MAPS (Market Activity Profiling System): Sunstone's proprietary machine learning engine. MAPS reads thousands of data sources per company, including websites, digital footprints, news and market signals, and translates them into structured insight on products, services, sector positioning, values and recent activity. Goes beyond traditional NACE codes by capturing how modern businesses actually trade. The MAPS view of DLR captures 12,087 visibly trading businesses.
- NACE codes: The standard European industry classification system. NACE groups companies into broad, generalised categories that miss the nuance of how modern businesses operate in practice.
- National Retrofit Plan: Ireland's policy framework for upgrading the residential building stock to higher energy ratings. The plan targets BER B2 upgrades for the pre-2000 dwelling cohort, of which DLR holds 62,529.
- Net worth (negative): A registered company's total liabilities exceeding its total assets, an indicator of balance-sheet pressure.
- NMCI (National Maritime College of Ireland): A higher education institution providing maritime training. Several DLR harbour-town businesses name-check NMCI directly in their public-facing copy.
- P&L (profit and loss): A standard financial statement showing revenue, costs and profit. Companies filing abridged accounts often don't include a P&L, which is why the report uses implied turnover as a proxy for those firms.
- Pipeline corridor: A defined geographic corridor scheduled for substantial new housing delivery. DLR's three named pipeline corridors are Cherrywood SDZ, Dundrum Central LDA and Woodbrook-Shankill-Bray DART.
- Place-economy: A local economic system shaped by the distinctive identity, public realm and community of a specific place, beyond just business density. Dún Laoghaire town reads as a place-economy supported by IADT, the National Film School, NMCI and the Purple Flag accreditation.
- Place-pride: The degree to which local businesses identify with and reference the place they sit in, captured through the voice pride score and the active-identity signals layer.
- Principal economic status: The single dominant role a CSO Census respondent reports as their main activity (e.g., at work, looking after home or family, retired, student). Captures only the respondent's dominant role, with secondary or part-time activity not separately recorded.
- Property SPV (Special Purpose Vehicle): A registered company set up to hold a specific property asset, typically financed through intercompany loans. SPVs commonly show distress signals on standard financial measures despite not being in trading distress, which is why the report excludes Real Estate from the headline stress cohort.
- Purple Flag: An international accreditation for town centres that demonstrate well-managed, vibrant and safe evening and night-time economies. Dún Laoghaire town received the 2026 Purple Flag accreditation.

Glossary Terms: S-Z

- SDZ (Strategic Development Zone): A planning designation for high-priority development sites with streamlined approval processes. Cherrywood SDZ covers ~360 hectares and ~10,500 planned homes around five Luas stops.
- SEAI (Sustainable Energy Authority of Ireland): Ireland's sustainable energy agency, source of the deep-retrofit median cost figure used in the report's c.€2.5bn lifetime retrofit market estimate.
- Service backbone: The combined infrastructure of childcare, education, healthcare, allied health, home care, residential care, pharmacies and similar facilities that supports day-to-day life across DLR.
- Shared Island Economic Corridor: The Chamber-led partnership with Bangor (Northern Ireland) using DLR's existing UK trading and ownership ties as the empirical anchor. The 187 DLR-registered entities with UK ultimate parents form the working base for that corridor.
- Sophistication tiers: The four-level digital maturity classification used in the report, from Basic through Intermediate, Advanced, and Leading-edge. Built from the twelve-point composite covering content management, e-commerce, analytics and AI tooling.
- Specialist cluster: A defined sub-grouping of trading businesses sharing a common sector or capability profile that runs through the wider trading base. The report identifies five specialist clusters in DLR: blue economy, private medicine, creative cluster, diaspora economy and energy-transition supply.
- Stress-flagged: A registered entity carrying the dual stress signal of current ratio under 1 alongside negative net worth. The report uses 3,167 stress-flagged trading-eligible entities as the headline cohort, with Real Estate excluded.
- Sub-domain markers: Identifiers in a business's web presence (such as URL components, page titles or named offerings) used by MAPS to classify the business's sector and capability.
- Talk-and-walk gap: The 409 DLR business websites carrying innovation language but no detectable AI or innovation evidence in their actual stack. A measure of the gap between innovation marketing and innovation practice.
- Third-place venues: Shared spaces people use as part of daily life beyond home and work, including cafés, libraries, gyms, community centres, parks and similar venues.
- Trading-eligible: Registered entities filing both a current ratio and a net-worth figure in their latest accounts. Used as the denominator for the report's SME stress analysis.
- Trading layer: The MAPS view of businesses operating visibly in DLR, distinct from the CRO registered view. The trading layer captures 12,087 visibly trading businesses, of which 8,092 link to a record on the CRO.
- Tusla: Ireland's Child and Family Agency, which sets the regulated child-to-staff ratios for early-years facilities. Referenced in the report's childcare capacity analysis.
- Ultimate parent / Immediate parent: Two levels of corporate ownership. The ultimate parent is the top of the ownership chain, with no further owner above it. The immediate parent is the direct owner, which itself may be owned by a higher entity. The report tracks both for cross-border ownership analysis.
- Usually-resident population: The CSO Census measure of people whose usual residence is in a given area, regardless of where they were on Census night. DLR's usually-resident population was 233,860 at Census 2022.
- Visibility counts: Counts derived from what is publicly visible in business-facing data (websites, sub-domains, public copy), distinct from registered or self-reported counts. The 196 minority-serving businesses figure is a visibility count.
- Voice pride score: A derived 0-to-5 metric reading each DLR business's website for the language of place attachment, naming of local landmarks, framing of community ties and explicit identification with the village or town where the business sits. Businesses without websites are scored 0 by definition.

A new lens on the Dún Laoghaire–Rathdown economy

The Dún Laoghaire–Rathdown Economic Intelligence Report brings together public datasets, local business intelligence and Sunstone's MAPS framework to provide a detailed view of the county's business base, spatial economy, sector strengths and future growth opportunities.

Produced by Sunstone in partnership with Dún Laoghaire–Rathdown Chamber.

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