Comhairle Contae
Fhine Gall
Fingal County
Council

FINGAL DEVELOPMENT PLAN 2023–2029

DRAFT PLAN
SUPPLEMENTARY INFORMATION

SOCIOECONOMIC PROFILE TRAVEL TRENDS ANALYSIS

FEBRUARY 2022

1 Introduction

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1.1 Overview

This report has been prepared by KPMG Future Analytics on behalf of Fingal County Council to describe the socioeconomic profile and travel trends within Fingal and all contained settlements based on the latest data. The report has been prepared in support of the ongoing preparation of the Fingal Development Plan 2023 - 2029. It provides desk-based quantitative analysis based on the published data and literature in relation to the social and economic indicators, travel trends and emerging trends in relation to the same over recent years.

1.2 Scope

The report provides the results of an analytical and qualitative bespoke study utilising the best available data on socio-economic, demography and households, economic activity and employment, travel patterns and connectivity. The intention of this analysis is to inform and support the ongoing preparation of the Fingal Development Plan 2023 – 2029.

This report focuses on distribution and pattern of statistical trends across Fingal primarily using the 2016 Census and associated data supplemented by documentation as published to February 2021. The data covers a wide range of spatial levels including Fingal itself, Dublin (i.e. the four local authorities of Dublin City, Dun-Laoghaire Rathdown, South Dublin and Fingal), regional (i.e. Eastern and Midlands region) and national (i.e. State-wide) context. Settlement level analysis has also been undertaken for the metropolitan area, key towns, other metropolitan areas, self-sustaining growth towns and self-sustaining towns.

More specifically, the socio-economic indicators relate to demography, economy and associated employment, education, health, deprivation, affluence and industry. In addition, to provide context of transport and commuting, research has been conducted relating to travel trends, issues surrounding transport and land use and travel patterns have been analysed as relates to movement and connectivity.

1 Introduction

1.3 Structure

This report provides the wider context across Fingal as well as settlement-specific analysis and as such has been structured to address the following

- Chapter 2 describes the approach to this assessment including the geographic scope of the Study Area (Section 2.1), the methodology (Section 2.2) and any relevant limitations and assumptions that have influenced the analysis (Section 2.3);
- Chapter 3 provides the socioeconomic profile including the social indicators across Fingal (Section 3.1), economic indicators across Fingal (3.2) and an overview of emerging trends of relevance (Section 3.3);
- Chapter 4 sets out the analysis of travel trends including the profile across Fingal (Section 4.1) and an overview of emerging trends of relevance (Section 4.2);
- Chapter 5 describes the settlement-specific profiles in relation to socio-economic and travel trends; and
- Chapter 6 provides the concluding commentary.

2 Approach

2 Approach

2.1 The Study Area

Fingal County Council is on the eastern coast of Ireland within County Dublin and the administrative boundary of the Eastern and Midland Regional Assembly. Fingal is one of four local authorities within County Dublin and is situated within the north stretching from the outskirts of Dublin City in the south, as far north as Balbriggan, with the eastern coast stretching from the Irish Sea and up to the Louth border. Fingal shares a western border with Meath as far as Ashbourne in the northwest and Leixlip in the southwest. This is illustrated in Figure 2-1.

Nationally and traditionally inland settlements have developed along river waterways historically, however much of the urban development in Fingal has been along the eastern coast including Howth, Sutton, Portmarnock, Malahide, Donabate, Portrane Rush, Skerries and Balbriggan. Swords has also developed as a central hub of population and employment along the M1 motorway leading from Dublin City to the North and next to Dublin Airport. The development of such settlements has been typified by the landscape and proximity to Dublin City which has influenced movement of people, development of industry and smaller settlements.

An overview of the settlement hierarchy within Fingal is set out in Table 2-1 including identification of those settlements that have been considered as part of the settlement-specific analysis in Section 5.

2 Approach

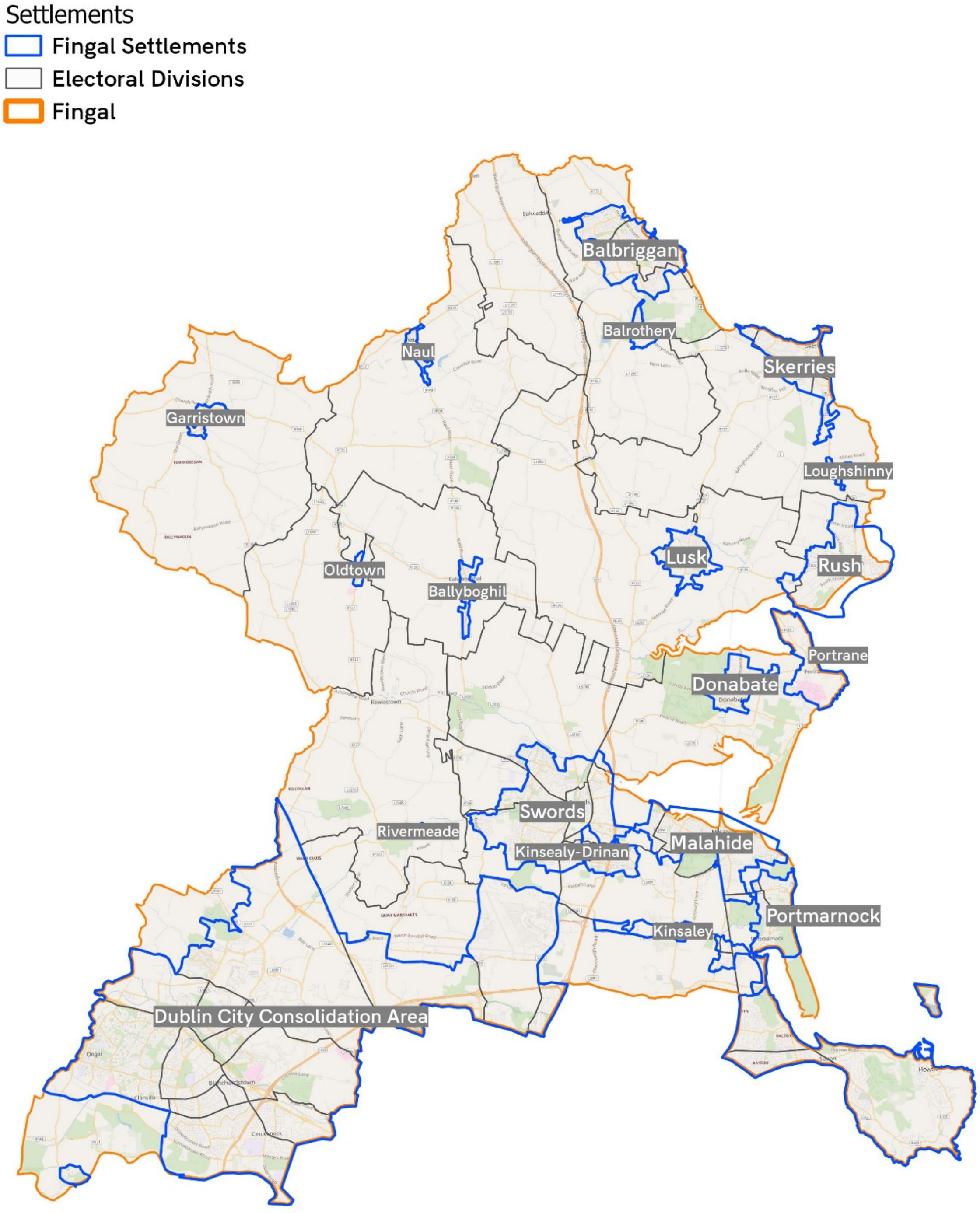

Figure 2-1: Overview of Fingal County Council

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Table 2-1: Settlement hierarchy in Fingal as per Variation 2 of the Fingal Development Plan 2017 – 2023

Settlement hierarchy	Settlement	Settlement-specific analysis undertaken
Metropolitan area	**Dublin City and Suburbs Consolidation Area:** Blanchardstown, Baldoyle, Castleknock, Clonsilla, Howth, Mulhuddart Village, Sutton, Santry (Incl. Ballymun), Balgriffin and Belcamp, Charlestown and Meakstown	Analysis undertaken
Key town	Swords	
Other metropolitan areas	Portmarnock, Baskin	
Self-sustaining growth towns	Donabate	
Self-sustaining towns	Malahide, Balbriggan, Lusk, Rush, Skerries	
Towns and villages	Portrane, Coolquay, Kinsealy, Rivermeade, Rolestown	No analysis undertaken
Other core towns and villages	Balrothery, Loughshinny, Ballyboughal, Naul, Balscadden, Oldtown, Garristown, Ballymadun	
Rural	Other areas	

2 Approach

2.2 Methodology

The social and economic indicators have been primarily sourced from the Central Statistics Office (CSO) census records. Specifically, data has been derived from the 2016 Census to serve as the socioeconomic baseline for the analysis (as it is the latest comprehensive dataset) with earlier releases such as 2002, 2006 and 2011 serving to indicate historic change such as population growth where relevant.

For the analysis of travel trends, the primary data source was the Census data along with the Place of Work, School or College - Census of Anonymised Records (POWSCAR) dataset from the CSO. This data provides an indication of movement of people and related socioeconomic indicators.

Specifically, the CSO has geocoded Small Area Profile (SAPS) data from the 2016 Census to understand relevant indicators as they relate to the socioeconomic metrics and the dynamic of flow of people. This enables detailed analysis of the socioeconomic profile of individual areas (i.e. Census SAPS data to support Section 3) and analysis of population by location of residence and by destination for work, school or college (i.e. POWSCAR data to support Section 4).

POWSCAR data includes all workers resident in Ireland and persons who work or attend education from the age of five and upwards on the Census night and it is accessible in two variants; microdata file and public. The POWSCAR microdata file provides full access to the socioeconomic data of commuters whilst public POWSCAR has a higher degree of anonymisation as it does not distinguish between those commuting for work or education and does not provide detailed socioeconomic breakdown.

GeoDirectory data, which is a complete database of all buildings in the Republic of Ireland and their use and geolocation, has also been analysed across Fingal. The GeoDirectory data used for this assessment is based on the final quarter of 2020 which is the latest complete dataset. This analysis has considered properties defined as commercial and both (i.e. both commercial and residential) and as categorised by NACE codes (which is the EU business activity operation classification scheme). This enables understanding and mapping of commercial properties by NACE codes to investigate business use, vacancies, industries etc.

Further published data, literature along with street and aerial mapping has been considered and documented where relevant to understand local characteristics, travel patterns, socioeconomic influences and emerging trends of relevance to the Study Area. It should be noted that there is a list of references provided at the end of this report which describes the literature and data sources that were reviewed and considered relevant to this assessment.

2.3 Limitations and Assumptions

All relevant assumptions and limitations in relation to data have been documented herein and the assessment has been undertaken using primarily secondary data (i.e. Census and POWSCAR 2016, Geodirectory etc.). Unless otherwise stated, it can be assumed that all data herein relates to April 2016 (i.e. the date of the latest Census).

Public POWSCAR has been used to determine commuter inflows and outflows for Fingal County Council, and it should be noted that this comprises a set of aggregate commuting figures by Electoral Division. Counts have been analysed by origin and destination to determine flow and dynamics of commuting. POWSCAR also provides counts of those who work from home and those with no fixed place of work. Those who commute to Northern Ireland and overseas are accounted for as a destination but not an origin. It should be noted that Electoral Divisions with fewer than 10 persons have not been disclosed and those who work and commute for education are aggregated.

3 Socioeconomic Profile

3 Socioeconomic Profile

This chapter describes the socioeconomic profile within and across Fingal. This has been determined through analysis of a series of social and economic indicators at the county and settlement level with reflections against Dublin, the region and State provided as appropriate herein.

Within the context of social indicators, Section 3.1 describes the profile in relation to demographics, housing, diversity, ethnicity and migration, affluence and deprivation, health status and education and skills. Within the context of economic indicators, Section 3.2 describes the profile of employment, industry and key sectors of the economy along with income analysis. Section 4.1 sets out the macroeconomic trends that have been emerging and affecting socioeconomic circumstances nationally including the impact of Coronavirus (COVID-19) and Brexit as of the new trade deal started at the outset of 2021.

It should be noted that Section 5 outlines the socioeconomic profile within the settlements of Fingal based on the settlement hierarchy as described in Table 2-1.

3.1 Social Indicators

3.1.1 Demographics

3.1.1.1 Population distribution

The population of Ireland was 4,761,865 in 2016 which represents 3.8% growth since 2011. Fingal is within the Eastern and Midland Regional Assembly which was the most populous region and fastest growing region in Ireland with growth of 5.4% over the intercensal period to a total of 2.3 million whilst Dublin had a total population of 1.35 million.

Fingal was the third most populous local authority in Ireland (after Dublin City and Cork County) with a total of 296,020 people. An overview of population distribution in Fingal County Council is indicated in Figure 3-1 to illustrate the geographic spread of people.

As illustrated in Figure 3-1, the distribution of population varied across Fingal with the highest population per Electoral Division concentrated along the outskirts of Dublin City (particularly in the western areas of Blanchardstown and Castleknock) and along the eastern coast (population is relatively evenly distributed from Howth up to Balbriggan). Naturally there were urban clusters of higher population such as Blanchardstown, Balbriggan and Swords whilst the north west of Fingal was the least populated area and indicative of the rural transition from north county Dublin towards Louth and Meath.

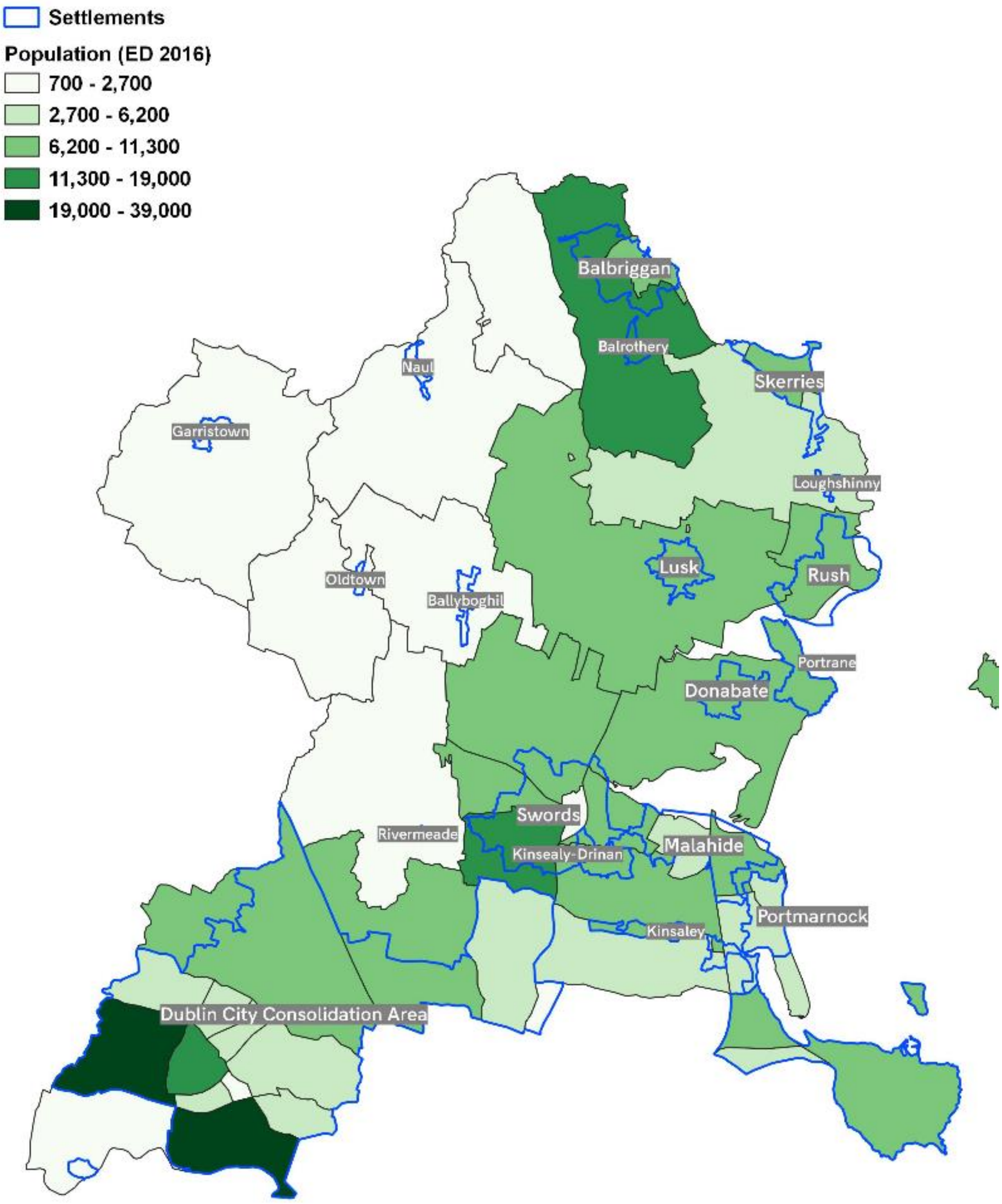

Figure 3-1: Population distribution (by Electoral District) within Fingal in 2016

3.1.1.2 Population growth

In terms of population change, Fingal demonstrated the highest population growth rate of any local authority in Ireland growing from 273,991 in 2011 by 8.0% (or 22,029 persons) to 296,020 people. This was significantly higher than the regional and national population growth rates (5.3% and 3.8% respectively).

3 Socioeconomic Profile

Within Fingal, 92.7% of the population lives within the Aggregate Town Area[1] (ATA) as defined by CSO whilst 7.3% reside in the Aggregate Rural Area (ARA). The population within the ATA grew by 8.5% during 2011-2016 whilst the ARA demonstrated a growth of just 2.1%. When analysed at the settlement level, population growth during 2011 – 2016 also varied greatly as illustrated in Table 3-1.

Table 3-1: Population Growth in Fingal Settlements 2011 – 2016 (Source: CSO)

Location	2011	2016	Absolute Change	Relative Change
Fingal County Council	273,991	296,020	22,909	8.0%
Settlements				
Balbriggan	19,960	21,722	1,762	8.8%
Ballyboghil	352	447	95	27.0%
Donabate	6,778	7,443	665	9.8%
Garristown	433	509	76	17.6%
Loughshinny	670	666	-4	-0.6%
Lusk	7,022	7,786	764	10.9%
Malahide	15,846	16,550	704	4.4%
Portmarnock	9,285	9,466	181	1.9%
Portrane	1,372	1,236	-136	-9.9%
Rivermeade	543	530	-13	-2.4%
Rush	9,231	9,943	712	7.7%
Skerries	9,671	10,043	372	3.8%
Swords	36,924	39,248	2,324	6.3%
Kinsealy-Drinan	5,814	6,643	829	14.3%
Oldtown	455	497	42	9.2%
Naul	445	568	123	27.6%
Balrothery	1,866	2,017	151	8.1%
Kinsaley	214	264	50	23.4%

The intercensal population growth in Fingal (Refer to Table 3-2) indicates the consistent high growth historically across Electoral Divisions. During that 35-year period, the population in Fingal grew from 114,951 to 296,020 people and 88.1% of the Electoral Divisions exhibited positive growth. Only five Electoral Divisions averaged negative change over the period (Blanchardstown-Corduff, Blanchardstown-Roselawn, Howth, Portmarnock North and Howth). However, of these Electoral Divisions all but Portmarnock North demonstrated population growth in the most recent intercensal period.

[1] The aggregate town area is defined as those persons living in population clusters of 1,500 or more inhabitants. The aggregate rural area contains the population residing in all areas outside clusters of 1,500 or more inhabitants. https://www.cso.ie/en/media/csoie/census/documents/vol3_appendix.pdf

3 Socioeconomic Profile

Table 3-2: Population growth (% change) in Fingal per Electoral District during 1981-2016 (Source: CSO)

Electoral Division	1981-1986	1986-1991	1991-1996	1996-2002	2002-2006	2006-2011	2011-2016	Mean Inter-censal
Airport	-45.2%	17.9%	37.5%	43.2%	236.3%	171.9%	24.5%	**69.4%**
Balbriggan Rural	28.2%	20.0%	16.5%	30.3%	110.8%	59.6%	8.9%	**39.2%**
Balbriggan Urban	1.8%	-4.7%	6.1%	15.5%	3.3%	10.2%	7.4%	**5.7%**
Baldoyle	5.7%	-1.2%	7.4%	-5.4%	-6.8%	18.6%	6.7%	**3.6%**
Balgriffin	-14.0%	0.5%	6.2%	-2.2%	54.4%	115.8%	58.3%	**31.3%**
Ballyboghil	11.9%	4.2%	5.6%	22.4%	12.0%	5.1%	14.9%	**10.9%**
Balscadden	1.5%	3.7%	19.4%	14.3%	13.2%	2.1%	6.0%	**8.6%**
Blanchardstown-Abbotstown	-8.7%	13.7%	-4.5%	65.7%	61.6%	18.8%	27.2%	**24.8%**
Blanchardstown-Blakestown	111.2%	20.0%	27.1%	61.3%	32.5%	11.5%	7.9%	**38.8%**
Blanchardstown-Coolmine	64.1%	2.8%	-0.8%	15.5%	16.6%	0.9%	4.6%	**14.8%**
Blanchardstown-Corduff	2.8%	-0.3%	-7.6%	-8.0%	-6.2%	-7.1%	2.2%	**-3.5%**
Blanchardstown-Delwood	4.1%	1.8%	-6.1%	8.4%	8.1%	1.7%	2.2%	**2.9%**
Blanchardstown-Mulhuddart	1495.6%	21.9%	-5.9%	47.2%	92.9%	9.4%	6.6%	**238.2%**
Blanchardstown-Roselawn	1.2%	-3.8%	-5.4%	-11.3%	-10.6%	-7.9%	0.4%	**-5.4%**
Blanchardstown-Tyrrelstown	339.3%	332.8%	27.0%	12.2%	-7.0%	37.3%	54.2%	**113.7%**
Castleknock-Knockmaroon	64.5%	33.7%	29.7%	33.9%	15.2%	5.6%	5.3%	**26.8%**
Castleknock-Park	22.3%	14.2%	4.1%	-5.8%	-3.7%	16.7%	4.0%	**7.4%**
Clonmethan	6.7%	2.9%	15.2%	23.0%	1.3%	28.9%	5.9%	**12.0%**
Donabate	0.2%	12.6%	12.8%	42.2%	23.8%	14.9%	7.6%	**16.3%**
Dubber	9.5%	-10.2%	-2.2%	45.2%	347.0%	69.8%	15.9%	**67.9%**
Garristown	8.8%	-0.5%	8.1%	9.6%	2.0%	21.4%	13.2%	**8.9%**
Hollywood	16.1%	3.8%	3.0%	5.8%	5.0%	25.9%	11.0%	**10.1%**
Holmpatrick	14.2%	1.3%	2.5%	2.5%	-5.2%	2.2%	7.3%	**3.5%**
Howth	1.5%	-1.7%	-1.8%	-3.4%	-5.8%	0.7%	0.5%	**-1.4%**
Kilsallaghan	7.8%	-0.6%	-1.4%	8.3%	2.3%	6.1%	2.6%	**3.6%**
Kinsaley	151.9%	52.2%	7.1%	7.5%	76.7%	35.9%	13.5%	**49.3%**
Lucan North	-13.6%	6.4%	7.3%	-0.6%	244.1%	16.8%	5.7%	**38.0%**
Lusk	17.8%	9.2%	6.8%	10.5%	70.4%	25.2%	9.2%	**21.3%**
Malahide East	3.9%	3.5%	7.8%	0.7%	17.8%	10.6%	8.0%	**7.5%**
Malahide West	6.6%	18.5%	8.0%	-2.0%	-2.5%	1.9%	-2.0%	**4.1%**
Portmarnock North	14.8%	1.2%	1.5%	-9.2%	-9.7%	-10.1%	-0.2%	**-1.6%**
Portmarnock South	3.7%	1.6%	-1.6%	-9.9%	6.0%	-2.0%	4.5%	**0.3%**
Rush	16.4%	7.5%	12.5%	24.4%	22.6%	11.0%	7.9%	**14.6%**

3 Socioeconomic Profile

Electoral Division	1981-1986	1986-1991	1991-1996	1996-2002	2002-2006	2006-2011	2011-2016	Mean Inter-censal
Skerries	16.2%	2.9%	6.4%	33.5%	7.3%	2.0%	2.0%	**10.0%**
Sutton	5.0%	2.4%	-2.8%	-4.7%	-4.7%	-5.1%	1.3%	**-1.2%**
Swords-Forrest	130.0%	36.1%	19.2%	23.8%	21.1%	17.1%	9.1%	**36.6%**
Swords-Glasmore	13.7%	-0.1%	46.3%	8.3%	1.5%	-0.6%	-0.5%	**9.8%**
Swords-Lissenhall	7.6%	11.4%	16.1%	88.7%	49.3%	6.5%	8.1%	**26.8%**
Swords-Seatown	96.0%	69.4%	35.5%	11.2%	20.1%	10.6%	7.1%	**35.7%**
Swords Village	-9.5%	3.0%	3.0%	11.8%	-2.2%	2.6%	3.6%	**1.8%**
The Ward	-4.8%	-0.2%	40.2%	62.3%	298.1%	58.3%	16.5%	**67.2%**
Turnapin	-4.4%	94.8%	3.0%	-7.7%	0.3%	-2.3%	1.0%	**12.1%**
Total	**20.5%**	**10.3%**	**9.8%**	**17.1%**	**22.1%**	**14.2%**	**8.0%**	**14.6%**

3.1.2 Population Structure and Age Profile

Fingal's age profile is illustrated in the population pyramid provided in Figure 3-2. There were 87,140 persons under 19 years of age with 24,899 children of pre-school age (0-4 years old). A further 39,349 children (13.3% of the population), were of primary school age (5-12 years old) and a further 22,892 (7.7% of the population) were of secondary school age (13-18 years old). This represents a relatively large proportion of younger people, whilst just 9.1% of the population are over 65 years of age which is significantly lower than the national average (13.0%).

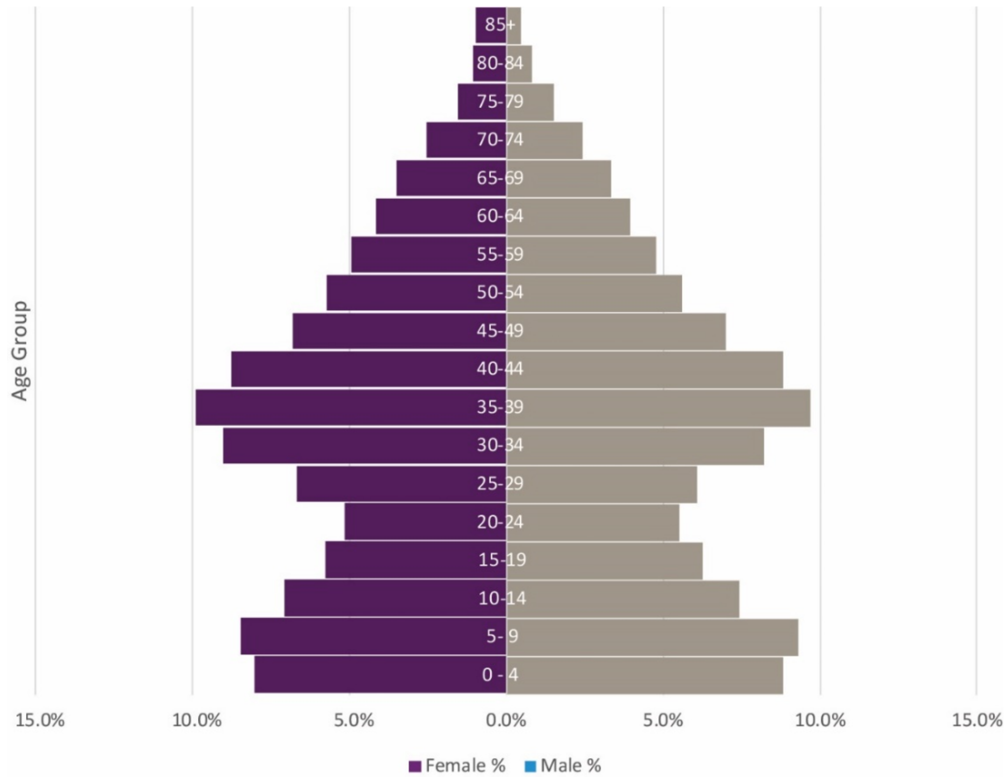

Figure 3-2: Population pyramid for Fingal (Source: CSO)

3 Socioeconomic Profile

Fingal County Council is the youngest local authority in the State (at 33.8 years) which is 3.7 years lower than the State, 2.2 years lower than the region and 2.5 years lower than Dublin average. Across Fingal, the average male is 33.1 years old, which was slightly younger than the average female at 34.4 years as illustrated in Table 3-3.

Table 3-3: Age and Cohort Structure for Fingal in 2016 (Source: CSO)

Age Structure	Fingal	Dublin	EMRA	State
Average Male	33.1 years	35.4 years	35.3 years	36.5 years
Average Female	34.4 years	37.1 years	36.6 years	38.3 years
Average Age	33.8 years	36.3 years	36.0 years	37.4 years
Cohort distribution and dependency in Fingal				
0-14	72,613	24.53%		
15-64	196,372	66.34%		
65+	27,035	9.13%		
Dependent Cohort	**99,648**	**33.66%**		

The age dependency ratio is the proportion of population in the young (0-14 years) and old (65 years and above) cohorts to the working population cohort (15-64 years). In the case of Fingal, the working cohort of Fingal equates to 66.3% of the population. Within Fingal, approximately 196,372 people are regarded as being of working age, of which this 162,865 (or 55.0% of the total population) are within the prime working age cohorts (25-64 years of age). In contrast, 33.7% of its population is dependent. This comprises 72,613 young persons (i.e. aged 0-14 years) and 27,035 older persons (i.e. aged 65 years and above).

Dependency ratios are used to indicate the balance between the working population and those that are dependent on them. Fingal's dependency (33.7%) is lower than the national average (34.5%) and comparable to the region (33.2%). 31.5% of the population across Dublin was dependent, however the latter was influenced by Dublin City which had a relatively low dependency rate of 28.1%. Fingal demonstrated the second lowest dependency rate of the four local authorities within Dublin.

3 Socioeconomic Profile

3.1.3 Family and household structures

3.1.3.1 Average Household Size

The average household size in Fingal County Council is 3.03 persons per household which is the highest of the local authorities in Dublin. Further, the average household size in Fingal is significantly higher than the regional and state average (2.75 and 2.80 respectively). A breakdown of average household size in Fingal compared to other relevant areas is set out in Table 3-4.

Table 3-4: Private Average Household Size in Fingal (Source: CSO)

Location	Private Households	Persons in Private Households	Average Household Size
State	1,702,289	4,676,648	2.75
Eastern and Midlands Region	815,557	2,282,857	2.80
All of Dublin	479,683	1,308,854	2.73
Dublin City	211,747	525,299	2.48
Dun Laoghaire-Rathdown	78,601	213,468	2.72
South Dublin	92,523	277,168	3.00
Fingal	**96,812**	**292,989**	**3.03**

3.1.3.2 Persons per Household

Specifically, the distribution of household size is more even in Fingal when compared to the State. Generally, Fingal has a much larger average household size given the proportion in households of at least two people. Just 15.8% of households in Fingal are single person households, which is less than Dublin, the region and the state (22.6%, 21.7% and 23.5% respectively). An overview of the population and number of households by size is provided in Table 3-5 with an illustrative comparison to the State set out in Figure 3-3.

Table 3-5: Number of persons per private household in Fingal County Council (Source: CSO)

Size of household	Households	Persons
1 person	15,257	15,257
2 persons	26,072	52,144
3 persons	19,104	57,312
4 persons	20,842	83,368
5 persons	10,464	52,320
6 persons	3,692	22,152
7 persons	914	6,398
8 or more persons	467	4,038
Total	**96,812**	**292,989**

3 Socioeconomic Profile

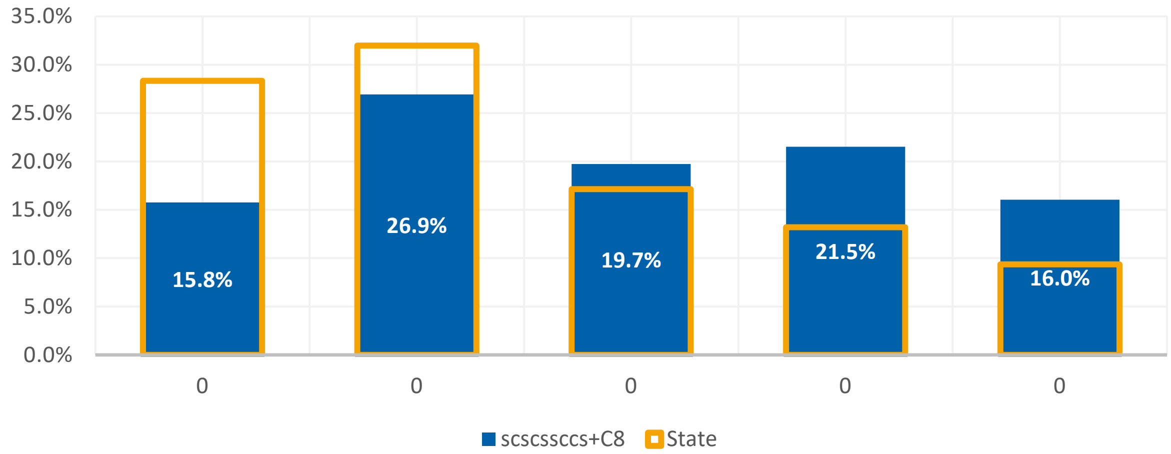

Figure 3-3: Proportion of households by size in Fingal and the State (Source: CSO)

3.1.3.3 Family Units

Fingal has a relatively high proportion of the population that are married and/or with children (86.4%) when compared to Dublin (78%), the region (81.8%) and the State (82.5%). Within Fingal 49.5% of persons are residing in households comprised of a married couple and children whilst just 5.2% of people are in one-person households which is significantly lower than the Dublin, regional and State comparisons (8.3%, 7.7% and 8.5%). An overview of the private households by type of family unit is described in Table 3-6.

Table 3-6: Persons per type of households by family unit type (Source: CSO)

Type of household	Persons in Fingal	% Fingal	% Dublin	% EMRA	% State
One person	15,257	5.2%	8.3%	7.7%	8.5%
Married couple	26,552	9.1%	9.8%	9.9%	10.9%
Cohabiting couple	8,380	2.9%	3.9%	3.3%	2.9%
Married couple and children	145,159	49.5%	40.6%	44.8%	46.5%
Cohabiting couple and children	17,406	5.9%	5.1%	5.8%	5.7%
Father and children	3,228	1.1%	1.2%	1.2%	1.3%
Mother and children	25,441	8.7%	9.3%	9.0%	8.9%
Couple and others	5,457	1.9%	2.2%	1.8%	1.5%
Couple children and others	14,898	5.1%	4.3%	4.1%	3.6%
Father children and others	936	0.3%	0.3%	0.3%	0.3%
Mother children and others	4,727	1.6%	1.9%	1.6%	1.4%
Two or more family units	9,278	3.2%	3.5%	3.2%	2.6%
Non-family households and relations	4,513	1.5%	2.5%	2.1%	1.9%
Two or more non-related persons	11,757	4.0%	7.2%	5.1%	4.1%
Total	**292,989**	**100%**	**100%**	**100%**	**100%**

3 Socioeconomic Profile

3.1.4 Diversity

3.1.4.1 Nationality and Citizenship

Fingal has a diverse population of different nationalities, citizens and ethnicities when compared to Dublin, the region and the State. 23.2% of the population defined their birthplace as outside of Ireland whilst 18.0% consider their nationality to be non-Irish.

Of the local authorities within Dublin, Fingal has the second highest proportion of the population that identify themselves as being of Irish nationality despite not being born in Ireland (5.2%). This is higher than all but Dun Laoghaire-Rathdown (6.4%) and higher than the regional (4.1%) and the state average (4.3%).

Within Fingal, the most common nationalities other than Irish are Polish, British, Lithuanian with a significant proportion coming from other EU countries and the rest of the world as demonstrated in Table 3-7.

Table 3-7: Usually resident population in Fingal by place of birth and nationality (Source: CSO)

Location	Birthplace	Nationality	Birthplace %	Nationality %
Ireland	224,521	239,648	76.8%	82.0%
UK	12,213	4,469	4.2%	1.5%
Poland	10,600	11,405	3.6%	3.9%
Lithuania	3,474	3,815	1.2%	1.3%
Other EU 28	16,365	16,642	5.6%	5.7%
Rest of World	25,154	10,578	8.6%	3.6%
Not stated	-	5,770	0.0%	2.0%
Total	292,327	292,327	100.0%	100.0%

As illustrated in Figure 3-4, the proportion of non-Irish by nationality is relatively high towards the south of the county, particularly in the Electoral Divisions of the Airport, the Ward, Dubber, Blanchardstown – Abbotstown and Blanchardstown – Corduff.

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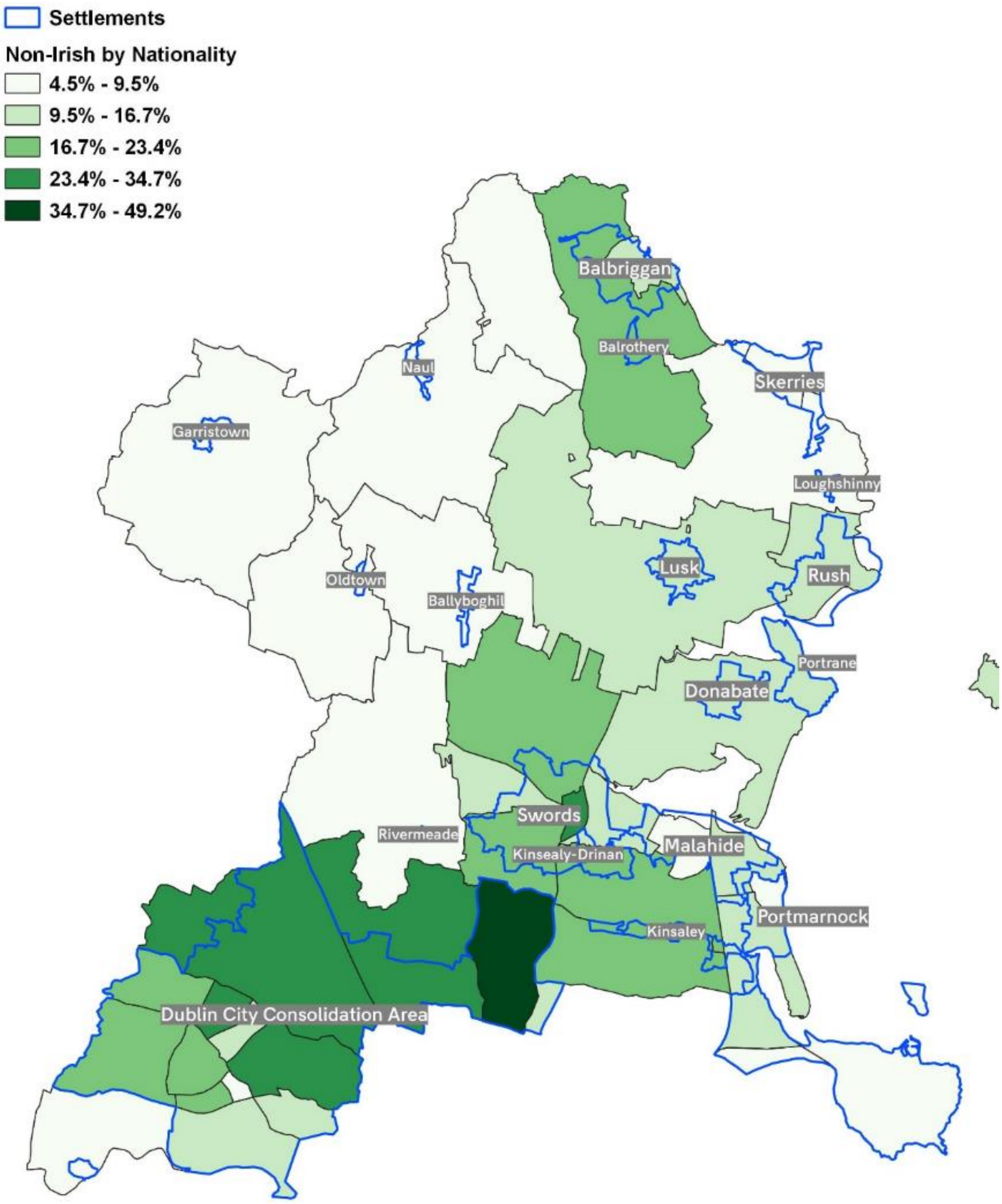


Figure 3-4: Proportion of non-Irish by nationality per Electoral District within Fingal

3.1.4.2 Ethnicity

The majority of the population categorised their ethnicity as 'White Irish' (71.5%) albeit this is slightly lower than the State (73.7%), region (79.1%) and Dublin (75.7%) illustrating diversity in Fingal. A further 14.5% of the population are categorised as 'Other Irish' with a further 3.9% categorised as 'Black or Black Irish' and 'Asian or Asian Irish' and smaller contributions to remaining ethnic groups as illustrated in Table 3-8. Specifically, the proportion of the population that categorise themselves as 'White Irish Traveller' is lower than the State (0.7%), region (0.6%) and Dublin (0.6%).

Table 3-8: Usually resident population by ethnic or cultural background in Fingal (Source: CSO)

Ethnic or Cultural Background	Persons	Total %
White Irish	208,942	71.5%
White Irish Traveller	1,315	0.4%
Other White	42,459	14.5%
Black or Black Irish	11,271	3.9%
Asian or Asian Irish	11,514	3.9%
Other	6,433	2.2%
Not stated	10,393	3.6%
Total	**292,327**	**100.0%**

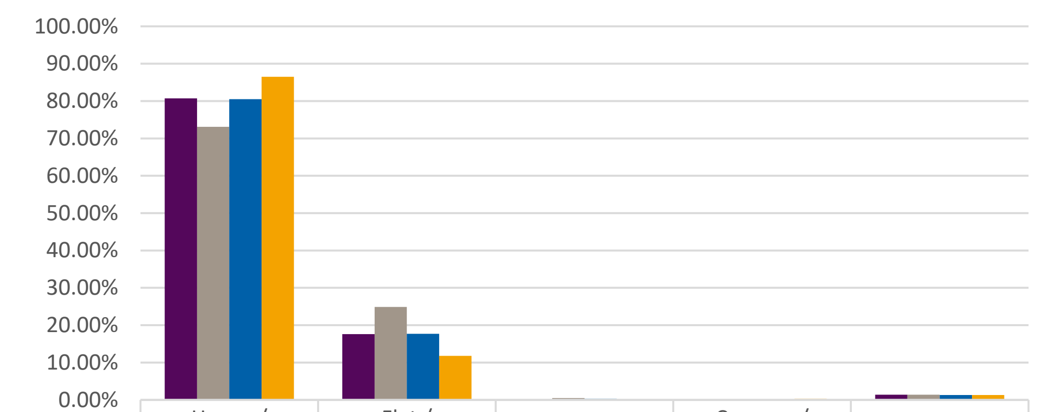
3.1.5 Housing

3.1.5.1 Types of Housing

The type of housing in Fingal is predominantly units associated with family living such as houses and bungalows which comprise 80.7% of all households. Of the remaining households 17.6% can be defined as apartment-living (i.e. flats, apartments and bed-sits[2]). The proportion of family unit types is lower that the State, (86.5%), higher than Dublin (73.1%) and generally comparable to the region (80.5%). Further detail on the proportion of private households by accommodation type is illustrated in Figure 3-5.

[2] It should be noted that it became illegal in 2013 for landlords to rent out bedsit-type accommodation over concerns that much of it was dilapidated, run-down and inadequate for modern habitation.

3 Socioeconomic Profile



	House / Bungalow	Flat / Apartment	Bed-sit	Caravan / Mobile Home	Not stated
Fingal	80.70%	17.60%	0.00%	0.20%	1.40%
Dublin	73.10%	24.90%	0.50%	0.10%	1.40%
EMRA	80.50%	17.70%	0.30%	0.20%	1.30%
State	86.50%	11.80%	0.20%	0.30%	1.30%

Figure 3-5: Private households (%) by type of accommodation (Source: CSO)

3.1.5.2 Age of Stock

Housing stock in Fingal is on average the youngest of the local authorities in Dublin with the average year a given unit was built in 1989 which is significantly lower than the Dublin average (1975). This is younger than Dublin City (1978), South Dublin (1983) and Dun Laoghaire Rathdown (1974) and significantly lower than the regional and national average year of construction (1978 and 1964 respectively).

3.1.5.3 Tenure

The majority of households in Fingal are owner occupied (67.6%) comprising of those occupied with a mortgage and those without (45.6% and 21.1% respectively). The other dominant tenure type is rental. 21.3% of households rent from a private landlord, 5.9% rent from a local authority and 0.8% rent from a voluntary body. The remaining 4.4% of households are occupied free of rent or not stated. A breakdown of tenure is set out in Table 3-9.

Table 3-9: Housing tenure in Fingal (Source: CSO)

Type of occupancy	Classification	Households	Households %
Owner occupied with mortgage	Owner Occupied (All)	39,983	41.4%
Owner occupied no mortgage		25,364	26.3%
Rented from Private Landlord	Rented (Privately)	20,558	21.3%
Rented from Local Authority	Social Housing	5,697	5.9%
Rented from Voluntary Body		761	0.8%
Occupied free of rent	Other	781	0.8%
Not stated		3,463	3.6%
Total		**96,607**	**100.0%**

3.1.5.4 Vacancy

7.6% of the permanent dwellings in Fingal were vacant comprising of 289 unoccupied holiday homes, 2,719 temporarily absent and 4,944 other vacant dwellings. Further, vacancy has declined by 17.5% in Fingal since the 2011 Census (9,643).

Comparatively Fingal is below the average vacancy rate for Dublin (9.2%), the Eastern and Midland Regional Assembly (9.9%) and the State (14.8%). The distribution of vacant households per Electoral Division is illustrated in Figure 3-6.

3 Socioeconomic Profile

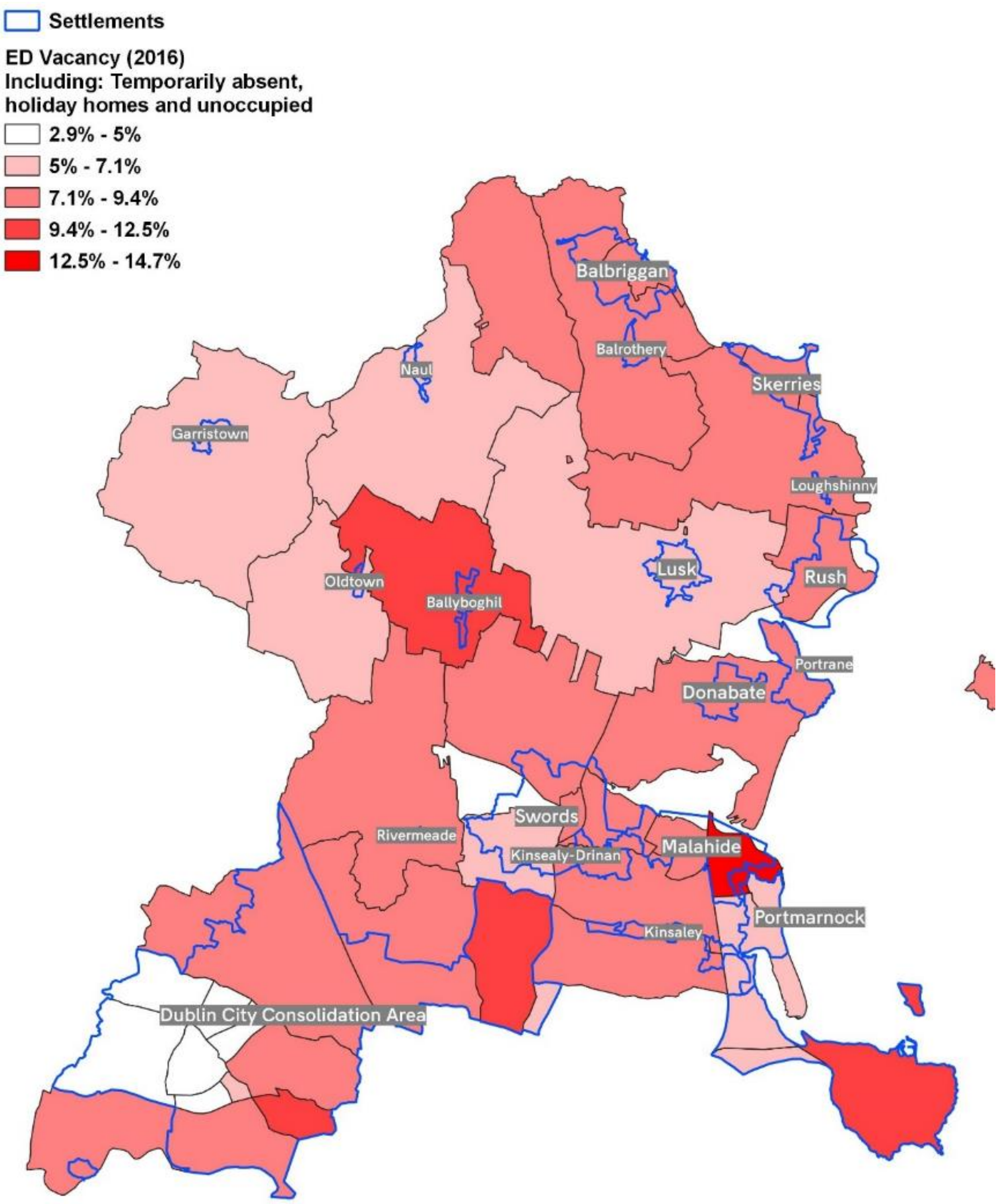


Figure 3-6: Vacancy of Housing Stock per Electoral Division in Fingal (Source: CSO)

3 Socioeconomic Profile

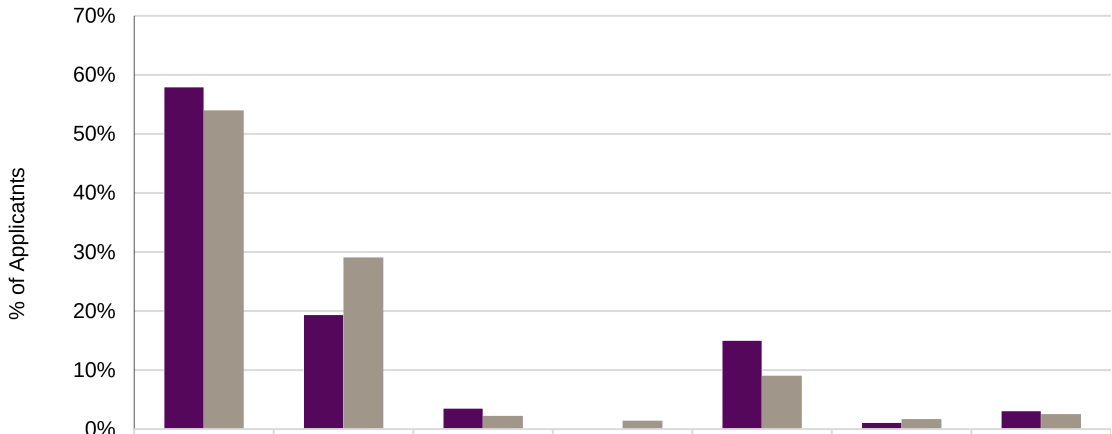
3.1.5.5 Social Housing

Social housing assessment data provided by Fingal County Council to the Housing Agency as part of the Rebuilding Ireland survey for 2019 has been analysed to understand the current status of social housing. This indicates that 5,607 households qualified for social housing support in Fingal. This represents a 19.8% decrease from 2018 which is the largest percentage decrease in social housing qualification across in Dublin as set out in Table 3-10 and largest overall decrease (by number) in the country.

Table 3-10: Number of households qualified for social housing support by Dublin local authority (2018-2019)

Local Authority	2018 Households Number and %		2019 Households Number and %		Change 2018-2019 Number and %	
Dublin City	16,514	23.0%	16,529	24.1	15	0.1%
Dún Laoghaire-Rathdown	2,843	4.0%	2,624	3.8	-219	-7.7%
South Dublin	4,846	6.7%	4,938	7.2	92	1.9%
Fingal	**6,993**	**9.7%**	**5,607**	**8.2**	**-1,386**	**-19.8%**

The employment status of applicants indicates that a vast majority (54.0%) across Dublin were unemployed and in receipt of social welfare. In Fingal 54.5% of applicants were unemployed and notably, Fingal had the lowest proportion of applicants who were employed at just 19.4% which was 10% lower than the Dublin average. Fingal also had the highest proportion of single parents on family supports at 15.0%, which was well above the Dublin average of 9.0%. This information is illustrated in Figure 3-7.



	Unemployed	Employed	Back-to-work/Solas scheme	Homemaker (no income)	One parent family supports	Other	Retired
Fingal	57.9%	19.4%	3.5%	0.0%	15.0%	1.1%	3.1%
All Dublin	54.0%	29.1%	2.2%	1.4%	9.0%	1.7%	2.5%

Figure 3-7: Social housing applicants by employment status in Dublin Local Authorities (2019)

The breakdown of specific requirements of applicants is set out in Figure 3-8. The vast majority of applicants across Fingal and Dublin (85.6% and 77.6%) are categorised as having general or unspecified needs. The largest remaining proportion of applicants are homeless (9.6% in Fingal) and it should be noted that Fingal has the second lowest number of applicants with disability and has the highest proportion of traveller applicants (2.3%) compared to the other local authorities in Dublin.

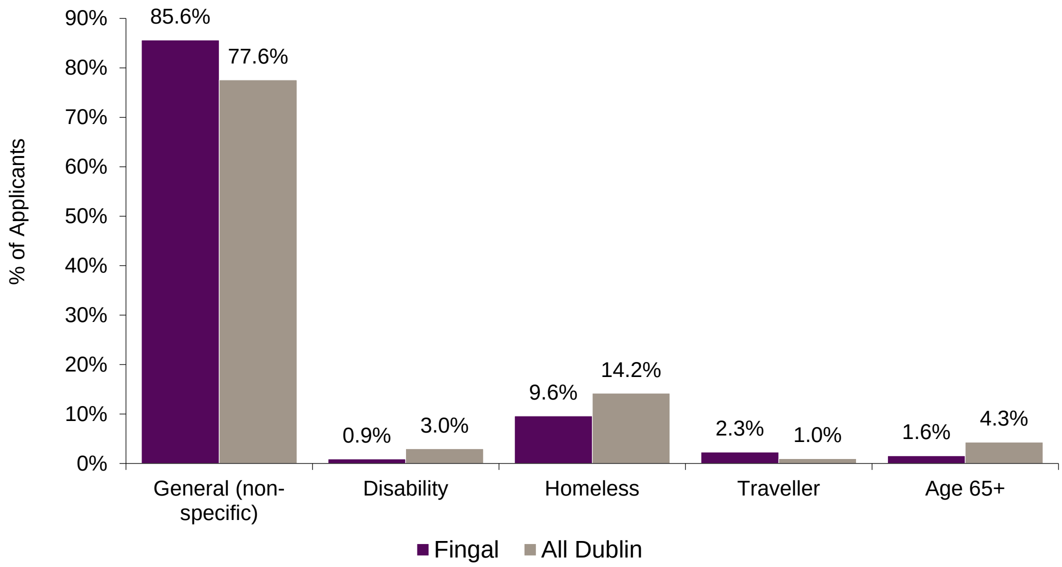


Figure 3-8: Social housing applicants by need (2019)

Fingal has a relatively large proportion (37.4%) of applicants who been waiting for more than seven years on the waiting list (compared to the Dublin average of 34.4%). The average duration on the waiting list has been illustrated using the upper range of the duration periods in Figure 3-9. Notably within Fingal and across Dublin there is a breakpoint after five years observed in duration on the list. In Fingal 49.1% of applicants wait up to five years and 50.9% wait more than five years whilst in Dublin 51.4% of applicants wait up to five years, and the remaining 48.6% wait for more than five years.

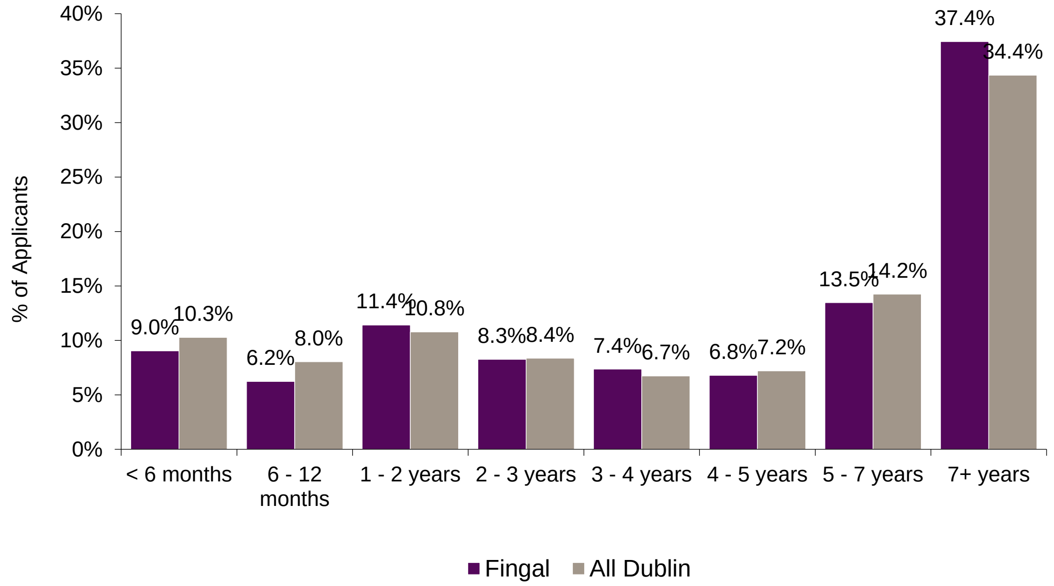


Figure 3-9: Social housing applicants by time on the waiting list (2019)

The majority of applicants for social housing are Irish citizens averaging 75.7% of applicants across Dublin and 81.9% in Fingal. Despite the diversity of its population, Fingal consistently has the second lowest proportion of non-Irish applicants in Dublin with only Dun Laoghaire-Rathdown recording less in 2019, however it is comparable proportion to many other local authorities across the state despite the relatively high proportion of non-nationals in Fingal.

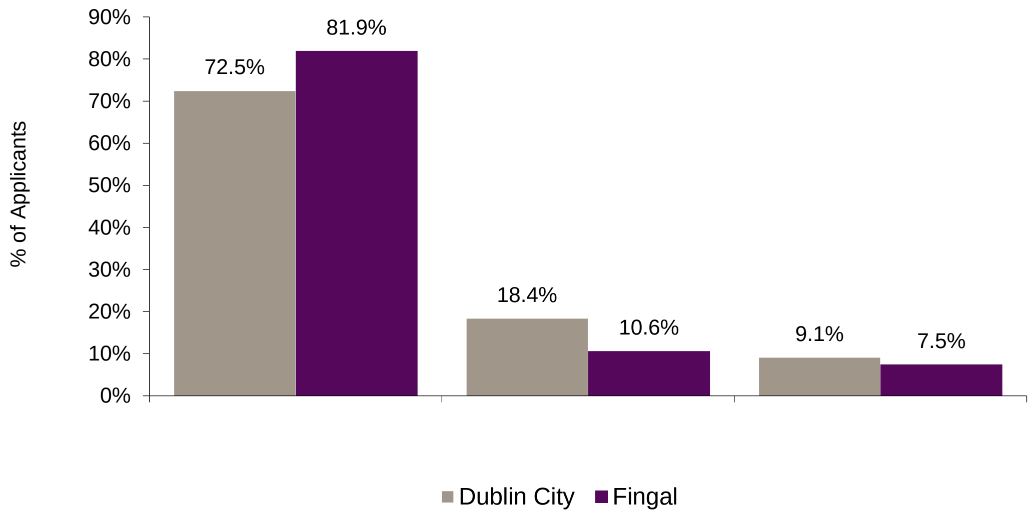


Figure 3-10: Social housing applicants by nationality (2019)

3 Socioeconomic Profile

The latest guidelines for planning authorities issued in December 2020 under Section 28 of the Planning and Development Act, 2000 (as amended) by the Department of Housing, Local Government and Heritage have determined unmet social housing needs per county. This existing unmet need has been further broken down to homelessness and overcrowding. Fingal has the third highest total existing unmet need nationally (after Dublin City and South Dublin), of which 568 are associated with overcrowding and 1,372 are associated with homelessness as illustrated in Table 3-11.

Table 3-11: Existing unmet need for social housing comprising overcrowding and homelessness by local authority in Dublin (Source: DHPLG)

	DCC	DLR	Fingal	SDCC	Dublin
Overcrowding and Concealed	1,929	220	**568**	541	3,258
Homelessness	3,705	274	**1,372**	1,509	6,861
Total Existing Unmet Need	5,634	494	**1,940**	2,050	10,119

3.1.6 Affluence and Deprivation

The Pobal Index provides a method of measuring the relative affluence or disadvantage of a particular geographical area using data compiled from various censuses. It is a recognised resource for identifying affluence and disadvantage, by providing local analysis of relevant metrics (i.e. the proportion of skilled professionals, education levels, employment levels, and single-parent households found in an area).

Within Fingal affluence is generally evident across most of the county with particular pockets (i.e. very affluent areas) evident around Castleknock, north Lucan, Malahide, to the south of Swords and Kinsealy (i.e. Airport and Balgriffin). In contrast pockets of Blanchardstown, Kilsallaghan and Balbriggan are considered to be below average and disadvantaged in the case of Blanchardstown-Corduff as illustrated in Figure 3-11.

3 Socioeconomic Profile

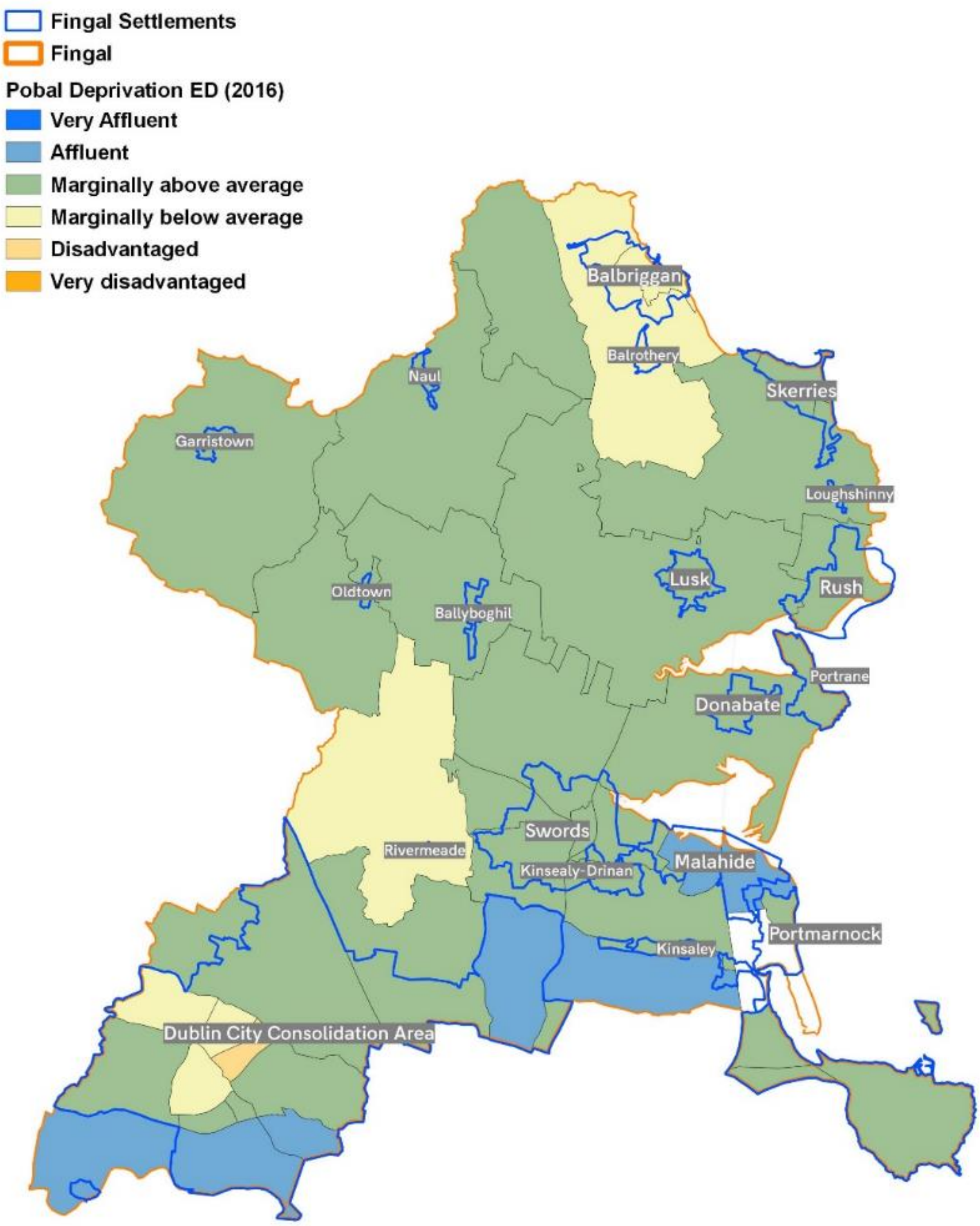


Figure 3-11: Pobal Index and relevant affluence/deprivation per Electoral Division in Fingal (Source: Pobal, 2017)

3.1.7 Health Status

88.5% of the population in Fingal considered themselves to be in Good Health and 1.3% considered themselves to be in Bad Health which is slightly better than Dublin (86.1% and 1.6% respectively) and comparable to the national and regional figures (87% and 1.6% respectively). It should be noted that this is specifically how the population considered their health status rather than a medical diagnosis in relation to their health.

Generally, those areas that are more affluent have a higher proportion of the population identifying as having Very Good Health whilst more deprived areas tended to have a higher proportion that identified themselves as being in Bad or Very Bad Health.

It should also be noted that the rate of disability rate in Fingal is relatively low when compared to Dublin, the region and State (10.8%, 13.1%, 13.1% and 13.5% respectively).

3.1.8 Education and Skills

3.1.8.1 Highest Level of Education Attainment

The population over 15 years of age in Fingal is well educated when compared to the national comparisons, generally aligned with the regional and slightly lower than Dublin as outlined in Table 3-12. Specifically, the proportion of the population above 15 years that has completed their second and third level education is much higher than the national and regional comparisons and the proportion of the population educated to primary level or less is relatively low in Fingal.

Table 3-12: Education (% persons) by Highest Level Achieved (Source: CSO)

Proportion	Number of persons in Fingal	Fingal	Dublin	EMRA	State
Third Level (Level 7)	22,716	12.6%	13.4%	12.0%	10.7%
Third Level (Level 6)	53,268	29.6%	24.7%	26.5%	27.3%
Up to Leaving Cert	56,037	31.1%	28.6%	31.2%	33.0%
Primary or Less	13,957	7.7%	10.6%	11.3%	12.5%
Masters or Higher	22,024	12.2%	14.7%	12.1%	10.1%

3.1.8.2 Field of Study

The field of study for the population over 15 years of age in Fingal is illustrated in Figure 3-12 and generally aligns with Dublin, the region and the State. There is a slightly higher proportion education in social sciences, business and law (19.6%) when compared to the region (17.5%) and State (14.7%), however this is slightly lower than the average for Dublin (20.1%). The same applies to science, mathematics and computing (6.1% in Fingal and Dublin, 5.3% in the region and 4.7% nationally) whilst the proportion that has not stated their field of study is relatively low in Fingal by comparison to other areas (43.9% in Fingal, 45.7% in Dublin, 47.7% in the region and 49.5% nationally).

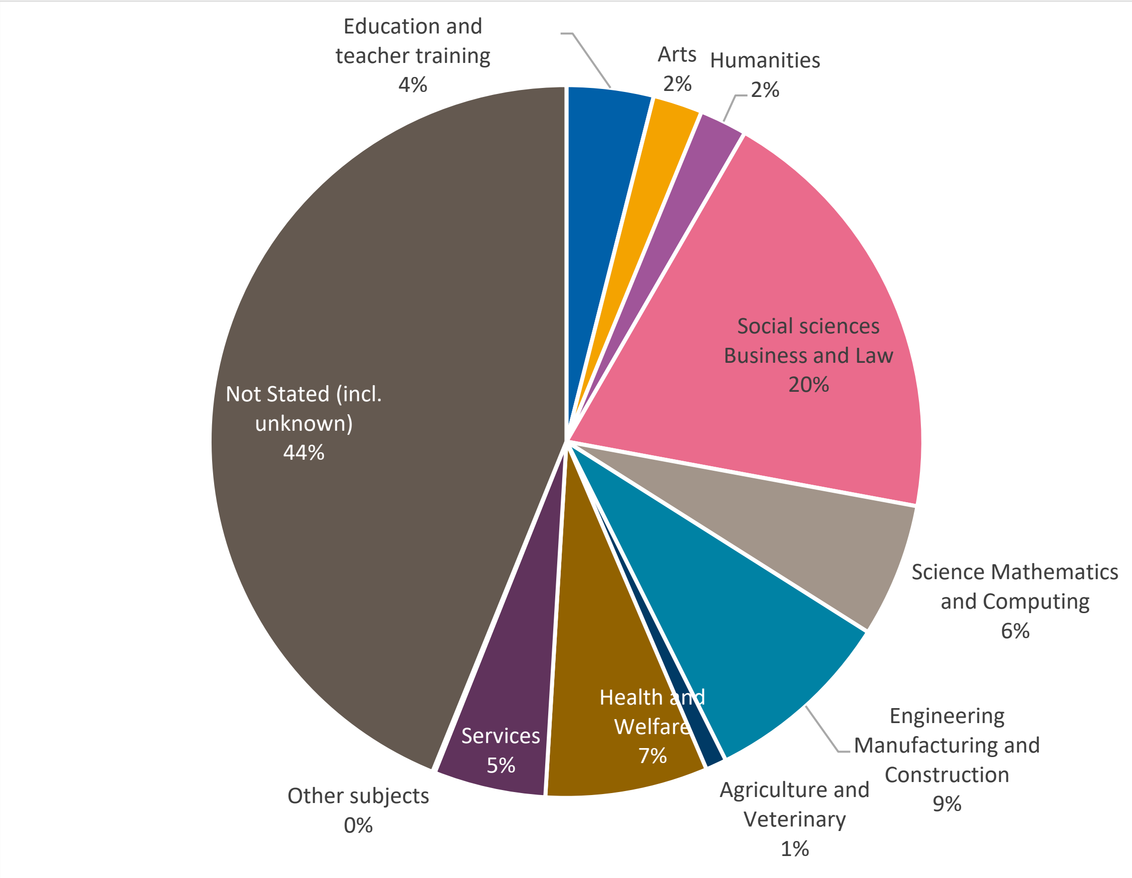


Figure 3-12: Field of Study (%) for the population over 15 years in Fingal (Source: CSO)

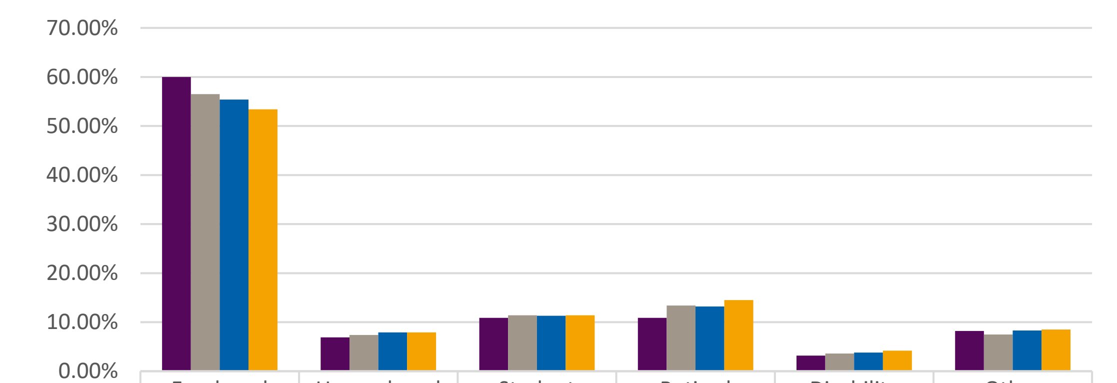
3 Socioeconomic Profile

3.2 Economic Indicators

3.2.1 Employment

3.2.1.1 Principal Economic Status

The principal economic status for the population over 15 years of age in Fingal is illustrated in Figure 3-13. Generally, the proportion in employment is slightly higher whilst the proportion unemployed, studying, disabled and retired is slightly lower than the Dublin, regional and national comparisons.



	Employed	Unemployed	Student	Retired	Disability	Other
Fingal	60.00%	6.90%	10.90%	10.90%	3.20%	8.20%
Dublin	56.50%	7.40%	11.40%	13.40%	3.60%	7.50%
EMRA	55.40%	7.90%	11.30%	13.20%	3.80%	8.30%
State	53.40%	7.90%	11.40%	14.50%	4.20%	8.50%

Figure 3-13: Principal Economic Status for the population over 15 years of age in Fingal (Source: CSO)

There is some gender disparity in relation to the principal economic status within Fingal as demonstrated by the following:

- There are 8,353 more males than females at work (i.e. 65.8% compared to 54.5% of females)
- There are 15,459 more females than males looking after the home or family (i.e. 14.5% of females compared to 1% of males)
- There are 860 more females than males unable to work due to permanent sickness or disability (i.e. 3.5% of females compared to 2.9% of males.

3.2.1.2 Social class

An overview of the social class of the population in Fingal, Dublin, the region and State is illustrated in Table 3-13. Generally managerial and technical, non-manual and skilled manual are the most dominant social classes which is consistent across all areas. However, the proportion of managerial and technical along with non-manual is higher in Fingal than Dublin, the region and State whilst the proportion of semi-skilled and unskilled is lower. This may be associated with relatively high levels of education which are further described in Section 3.1.8 and it is also generally indicative of affluence which is discussed in further detail in Section 3.1.6.

Table 3-13: Social class of the population (Source: CSO)

	Fingal	Dublin	EMRA	State
Professional workers	8.94%	10.08%	8.90%	8.12%
Managerial and technical	32.88%	30.44%	29.75%	28.08%
Non-manual	18.46%	17.36%	17.58%	17.58%
Skilled manual	12.87%	11.82%	13.23%	14.11%
Semi-skilled	8.52%	8.33%	9.31%	10.52%
Unskilled	2.80%	3.07%	3.34%	3.58%
All others gainfully occupied and unknown	15.55%	18.92%	17.89%	18.01%

3.2.1.3 Industries of employment

An overview of the persons at work by industry is provided in Figure 3-14. Overall, the proportional splits are relatively comparable to the national, regional and Dublin breakdown with dominance of commerce and trade and professional services.

Some notable distinctions include a slightly higher proportion working in transport and communications (potentially related to the presence of Dublin Airport and various IT companies in the area), public administration (potentially due to the presence of public bodies in Fingal and more generally in Dublin) along with a relatively higher proportion in agriculture, forestry and fishing when compared to Dublin (likely due to the extensive and historic industries in north county).

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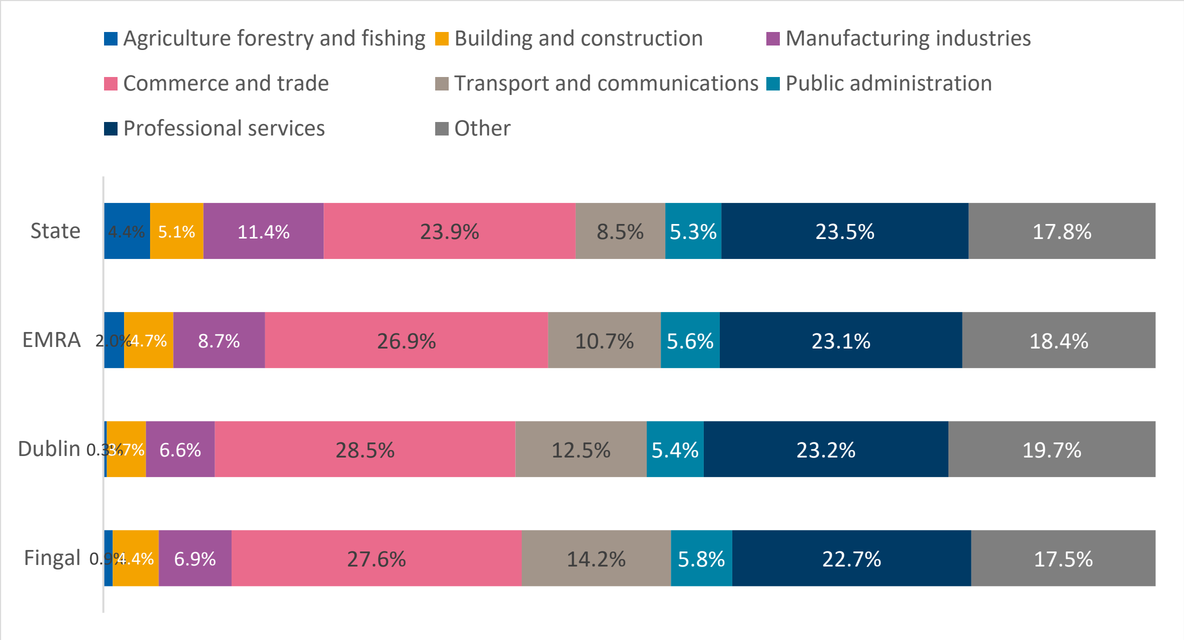

Figure 3-14: Persons at work (%) by industry (Source: CSO)

3.2.2 Unemployment

As outlined in Section 3.2.1.1, approximately 6.9% of the population over 15 years in Fingal (or 15,415 people) was unemployed in April 2016 and this was generally lower than Dublin, the region and State. Of those unemployed, 0.8% were looking for their first job whilst 6.1% were unemployed having given up or lost their previous job. It should be noted that gender disparity was evident in terms of unemployment in that 7.4% of males were unemployed in comparison to 6.5% of females.

Since then, unemployment has generally decreased in line with the regional and national trends as illustrated by the monthly live register data[3] per social welfare office in Figure 3-15. It should be noted that there was some overlap between those who met the criteria to be included on the Live Register and those who benefited from either of the two COVID-19 income support schemes during 2020 and this is discussed in further detail in Section 4.1.1.

[3] This relates to all persons under 65 years of age who are claiming Jobseekers Benefit, Jobseekers Allowance and Other registrants.

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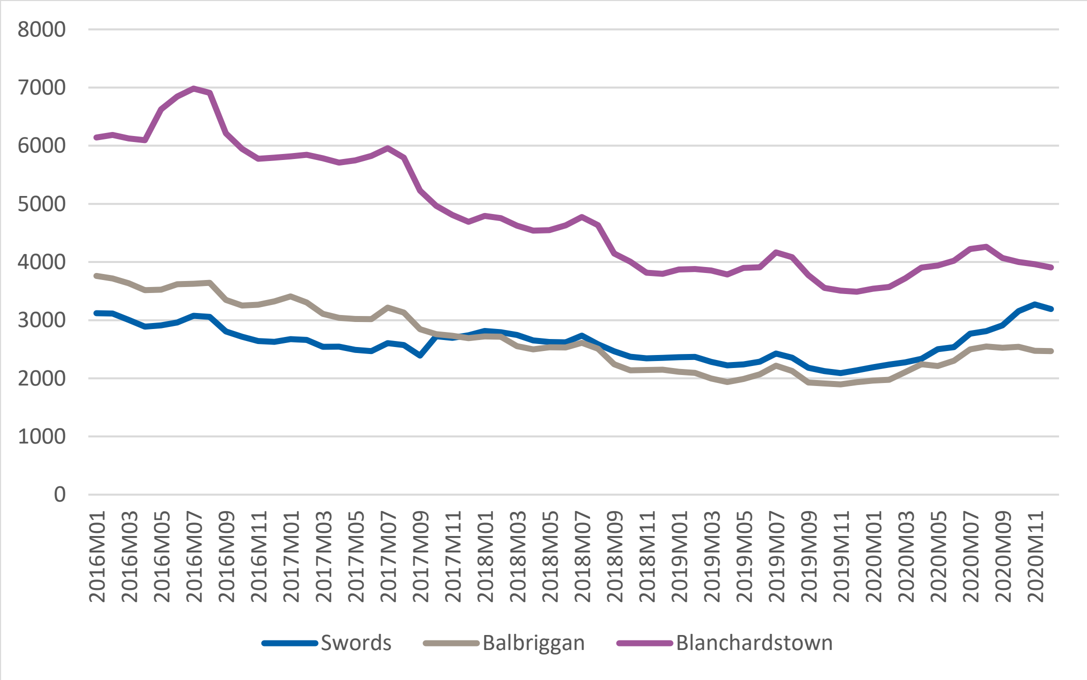

Figure 3-15: Live Register Data for offices within Fingal 2016 – 2020 (Source: CSO)

3.2.3 Commuting

The average journey time to work, school or college for those in Fingal is 32.4 minutes which is slightly higher than the Dublin, regional and national comparisons (30.8 minutes, 30.5 minutes and 27.4 minutes respectively). This can be associated with the fact that almost 25,000 people (or 12.5% of the population) spend over an hour commuting.

The means of travel for those commuting to education or employment is illustrated in Figure 3-16. Generally private car, public and active transport are the most popular modes with spatial differences along with differences between employees and students.

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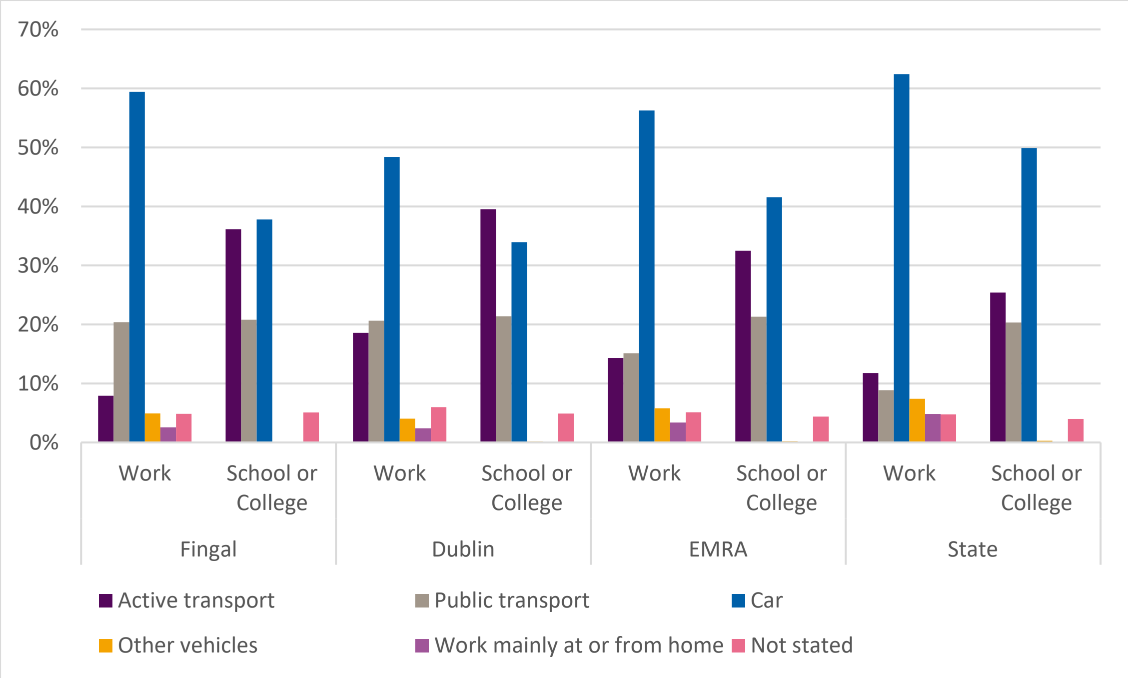

Figure 3-16: Means of travel (% population over 5 years) to education work, school or college (Source: CSO)

The proportion of students using active and public transport is relatively high (36.1% and 20.8%) and comparable to Dublin (39.5% and 21.4% respectively), most likely given proximity to schools and accessibility of the network in Fingal and Dublin more generally. This is particularly evident when compared to the region (32.5% and 21.3% respectively) and national comparisons (25.4% and 20.3% respectively). This results in a smaller reliance on private vehicles in Fingal when compared to the region and State (37.8%, 41.6% and 49.9% respectively).

For employees travelling to work in Fingal, private car is the dominant mode (59.4%) and it is higher than Dublin and the region (48.4% and 56.3%), but lower than the national comparison (62.4%). Public transport is also well used by employees in Fingal travelling to work (20.4%) which compares well with Dublin (20.6%) and is significantly higher than the regional and national comparisons (15.1% and 8.9%).

Car ownership in Fingal increased from 2011 – 2016. 1,707 (or 2.2%) fewer households had no cars which equated to just 10% of households in 2016. This is significantly lower than Dublin, the region and State (21.4%, 17.2% and 15.2% respectively) and overall the proportion of those households with one car and with two or more cars is higher than other areas as illustrated in Table 3-14.

Table 3-14: Car ownership in households (Source: CSO)

Cars per household	Fingal	Dublin	EMRA	State
No cars	10.0%	21.4%	17.2%	15.2%
One car	43.7%	42.1%	41.2%	41.0%
Two more cars	42.8%	32.3%	38.1%	40.8%

3.2.4 Industry Information

3.2.4.1 Enterprises

National and Dublin Context

In 2018, the CSO published data on Business Demography which provides the most comprehensive data on enterprises and associated employment at state and county level. It should be noted that this is only available across County Dublin rather than for Fingal. The Business Demography data relates to all active and registered enterprises as well as related persons employed and engaged. This data has been analysed for Dublin and comparatively for the State to provide broader context as set out in Table 3-15.

In 2018 the following key insights were evident in County Dublin:

- A total of 88,161 enterprises were active and 750,204 persons were engaged in enterprises across Dublin (i.e. owners, relatives and/or employees).
- 32.6% of all active enterprises and 46.7% of all owners and employees for enterprises within the State are located in Dublin.
- The rate of new business development in Dublin accelerated over the past decade. Specifically, 16.4% growth in new businesses was evident during 2014 - 2018.
- 90.8% of all active enterprises in Dublin are classified as micro (i.e. under 10 staff) and this comprises 15.8% of the total persons engaged with enterprises in Dublin.
- Enterprises with more than ten employees account for just 9.2% of all enterprises but represent 84.2% of the population engaged with enterprises in Dublin.

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- The main sectors that the Dublin enterprises contribute to (by quantum) are professional, scientific and technical activities (15.7%), wholesale and retail (10.8%) and construction (10.8%). These three sectors account for 37.3% of all active enterprises in total in Dublin and they generally align with the national comparison.
- The principal sector of employment for enterprises in Dublin are Wholesale and retail (17.2%), Human Health and Social (10.8%) and Financial and insurance (8.8%). that account for 36.8% of all employees. These three sectors account for 36.8% of all persons engaged with enterprises in Dublin.

Table 3-15: Business Demography in the State and Dublin in 2018 (Source: CSO)

Number of enterprises Total	**Dublin 88,161**	**State 270,344**
Total persons engaged - (owners and employees)	750,204	1,607,911
% Change		
2008-2010	-16.0%	-0.6%
2010-2012	-0.4%	0.7%
2012-2014	5.5%	-2.5%
2014-2016	10.8%	4.9%
2016-2018	8.8%	8.1%
Micro enterprises (less than 10 employees)		
% of all enterprises	91.9%	90.8%
% of all persons engaged in enterprises	15.8%	25.7%
Enterprises with 10+ employees		
% of all enterprises	9.2%	8.1%
% of all persons engaged in enterprises	84.2%	74.3%
Top Three Sectors By Number of Enterprises		
1	Professional, scientific and technical activities (15.7%)	Construction (16.5%)
2	Wholesale and retail (10.8%)	Wholesale and retail (13.7%)
3	Construction (10.8%)	Professional, scientific and technical activities (12.5%)
Top Three Sectors By Number of Persons Engaged		
1	Wholesale and retail (17.2%)	Wholesale and retail (16.8%)
2	Human Health and Social (10.8%)	Human Health and Social (10.3%)
3	Financial and insurance (8.8%)	Manufacturing (10.2%)

Source: CSO 2018 Tables BRA08 and BRA18

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Further analysis of the enterprises in County Dublin by size is presented in Table 3-16. There were only 388 large enterprises (of at least 250 employees) registered in the county (or 0.38% of the total), however they jointly employ 359,748 people. Small, medium and large enterprises combined only account for 9.2% of all enterprises registered in Dublin. 118,700 people worked in micro-enterprises registered in the county. However, as micro-enterprises employ fewer people each, their share of all persons engaged (15.8%) is considerably smaller than their share of enterprises (90.8%).

Many micro-enterprises are run by an owner/manager, therefore owners account for a larger share of the total workforce of micro-enterprises. Employees account for 67.7% of total persons engaged in microenterprises which means that 32.3% are owners. As such, micro-enterprises account for only 11.3% of all employees in enterprises. In total 88.7% of all employees work in the 8,133 enterprises with 10 or more staff.

Table 3-16: Number of active enterprises, persons engaged and employees by size in Dublin in 2018 (Source: CSO)

Employment Size	Active Enterprises	Employees	Persons Engaged	Employees as % of Persons Engaged
Under 10	80,028	80,374	118,700	67.7%
10 - 19	3,751	49,978	50,490	99.0%
20 - 49	2,548	76,959	77,171	99.7%
50 - 249	1,446	143,884	144,095	99.9%
250 and over	388	359,161	359,748	99.8%
Total	**88,161**	**710,356**	**750,204**	**94.7%**
% in Micro-Enterprise	90.8%	11.3%	15.8%	
% in Enterprise 10+	9.2%	88.7%	84.2%	

Enterprise Supports in Fingal

Analysis of the 2019 data for Fingal from the Local Enterprise Office (i.e. the latest available data) indicates a client portfolio of 242 businesses which created an additional 168 jobs (both full and part-time) during the year. Total employment in the Fingal LEO client portfolio was 1,085 employees (both full and part-time).

A net increase of 109 jobs was observed in 2019. The 2020 target was an increase of 110 jobs to be added to the total employment portfolio with no jobs lost from 2019. This would bring a balance to gross and net jobs created.

Performance of the client portfolio was also monitored via a series of metrics including; applications received, and funding approved, training and development programmes, mentoring and others. Overall, the performance against these metrics was generally positive and surpassed the targets that have been set for 2020. Specifically, 51 applications were received in 2019 for a variety of supports including feasibility, priming, business expansion and TAME (Technical Assistance for Micro Exporters) and 129 programmes for training and/or development were delivered to 2,695 participants and seven clients were transferred to Enterprise Ireland.

3.2.4.2 Distribution of Commercial Properties

Geodirectory data from the final quarter of 2020 has been analysed to understand commercial properties within Fingal. This analysis has considered properties defined as commercial and both (i.e. both commercial and residential) and as categorised by NACE codes (which is the EU business activity operation classification scheme).

Specifically, this analysis considers commercial properties with a NACE code and the distribution of properties by NACE code is set out in Table 3-17 and illustrated in Figure 3-17. Based on this information, the largest quantum of commercial properties by sector (i.e. NACE code) in Fingal are:

- (G) wholesale and retail trade; repair of motor vehicles and motorcycles
- accommodation and food service activities
- (Q) human health and social work activities
- (S) other service activities

Combined heatmap and cluster (point) maps of those sectors is provided in Figure 3-18 - Figure 3-21 to demonstrate the distribution of those commercial properties.

Table 3-17: Commercial properties by NACE sector in Fingal (2020 Q4)

NACE Classification of Activity	Number	%
A - AGRICULTURE, FORESTRY AND FISHING	414	5.9%
B - MINING AND QUARRYING	2	0.0%
C - MANUFACTURING	318	4.5%
D - ELECTRICITY, GAS, STEAM AND AIR CONDITIONING SUPPLY	13	0.2%
E - WATER SUPPLY; SEWERAGE, WASTE MANAGEMENT AND REMEDIATION ACTIVITIES	30	0.4%
F - CONSTRUCTION	231	3.3%
G - WHOLESALE AND RETAIL TRADE; REPAIR OF MOTOR VEHICLES AND MOTORCYCLES	1,536	21.9%
H - TRANSPORTATION AND STORAGE	375	5.3%
I - ACCOMMODATION AND FOOD SERVICE ACTIVITIES	754	10.7%
J - INFORMATION AND COMMUNICATION	174	2.5%
K - FINANCIAL AND INSURANCE ACTIVITIES	206	2.9%
L - REAL ESTATE ACTIVITIES	125	1.8%
M - PROFESSIONAL, SCIENTIFIC AND TECHNICAL ACTIVITIES	464	6.6%
N - ADMINISTRATIVE AND SUPPORT SERVICE ACTIVITIES	312	4.4%
O - PUBLIC ADMINISTRATION AND DEFENCE; COMPULSORY SOCIAL SECURITY	97	1.4%
P - EDUCATION	225	3.2%
Q - HUMAN HEALTH AND SOCIAL WORK ACTIVITIES	703	10.0%
R - ARTS, ENTERTAINMENT AND RECREATION	395	5.6%
S - OTHER SERVICE ACTIVITIES	655	9.3%
Total	**7,029**	**100%**

3 Socioeconomic Profile

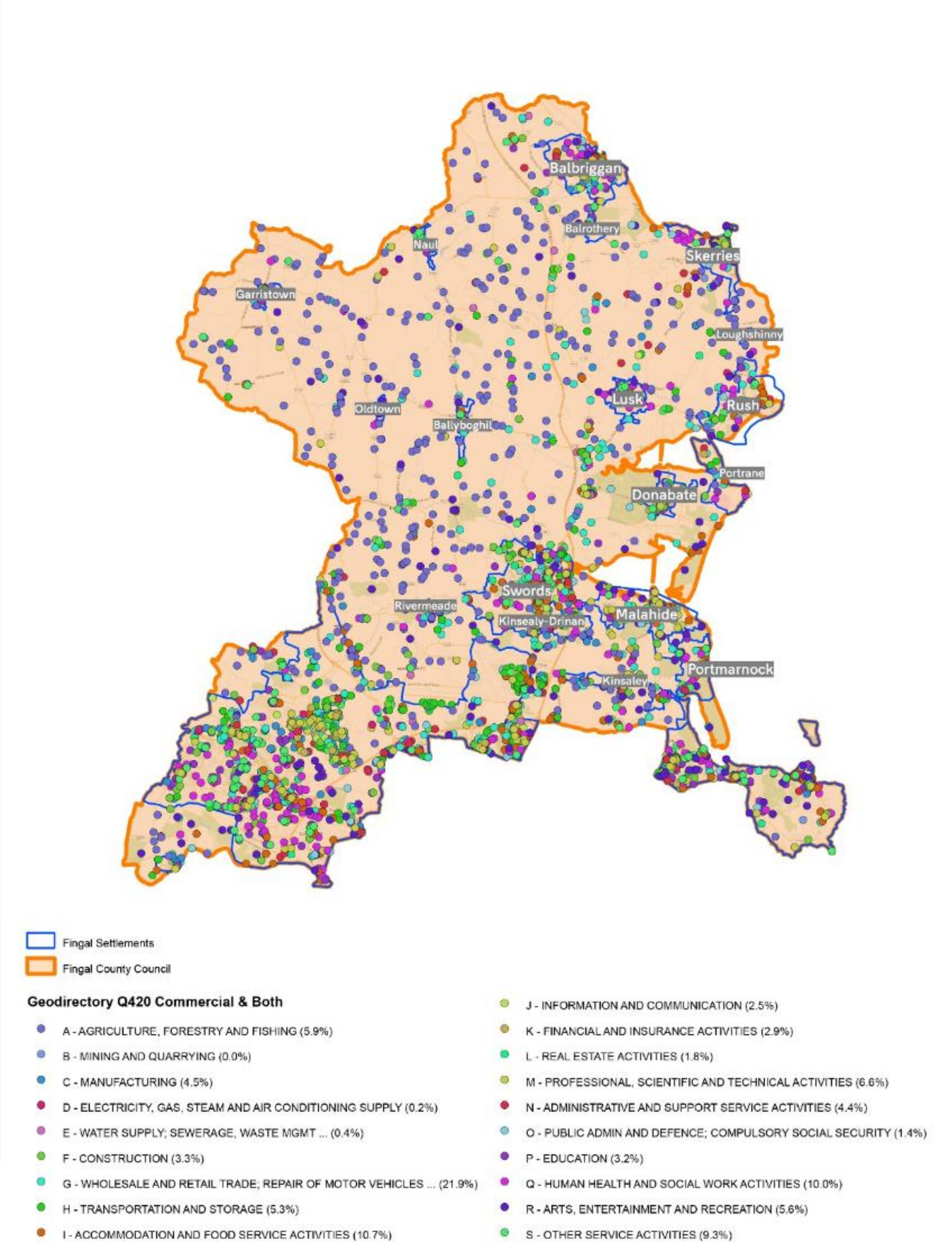

Figure 3-17: Commercial businesses by NACE code in Fingal (Source: Geodirectory)

3 Socioeconomic Profile

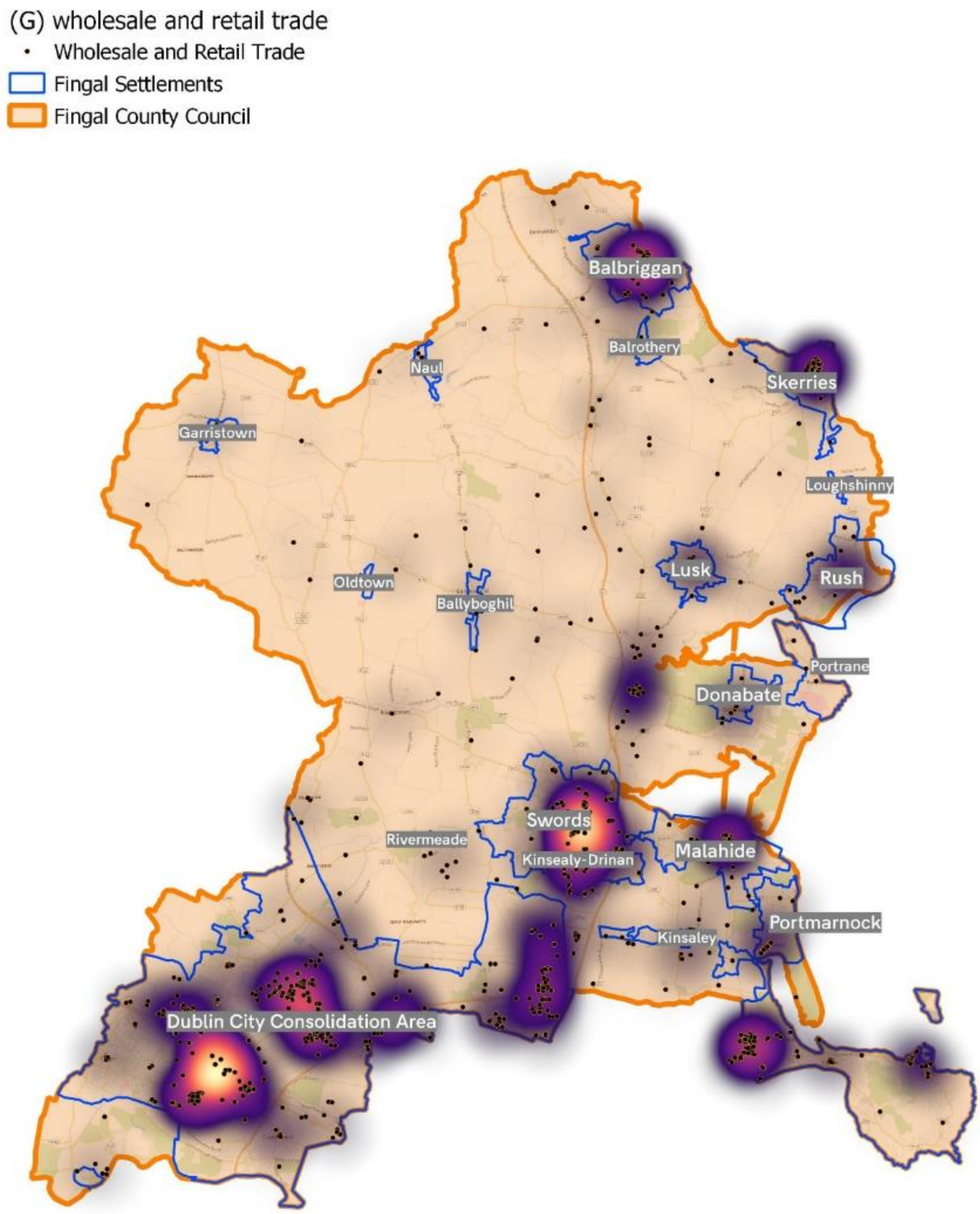

Figure 3-18: Wholesale and Retail Trade Properties in Fingal (Source: Geodirectory)

3 Socioeconomic Profile

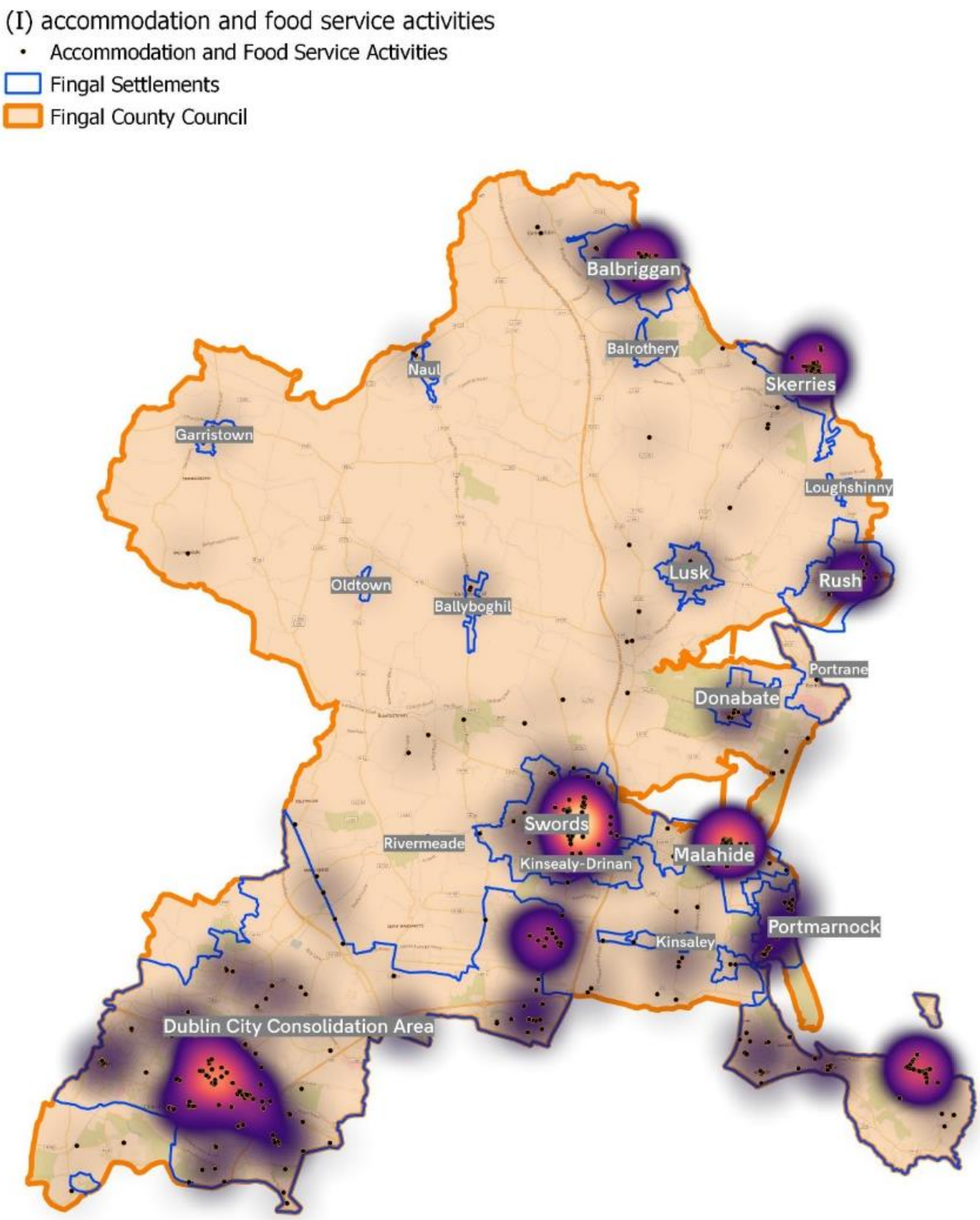

Figure 3-19: Accommodation and Food Service Activities Properties in Fingal (Source: Geodirectory)

3 Socioeconomic Profile

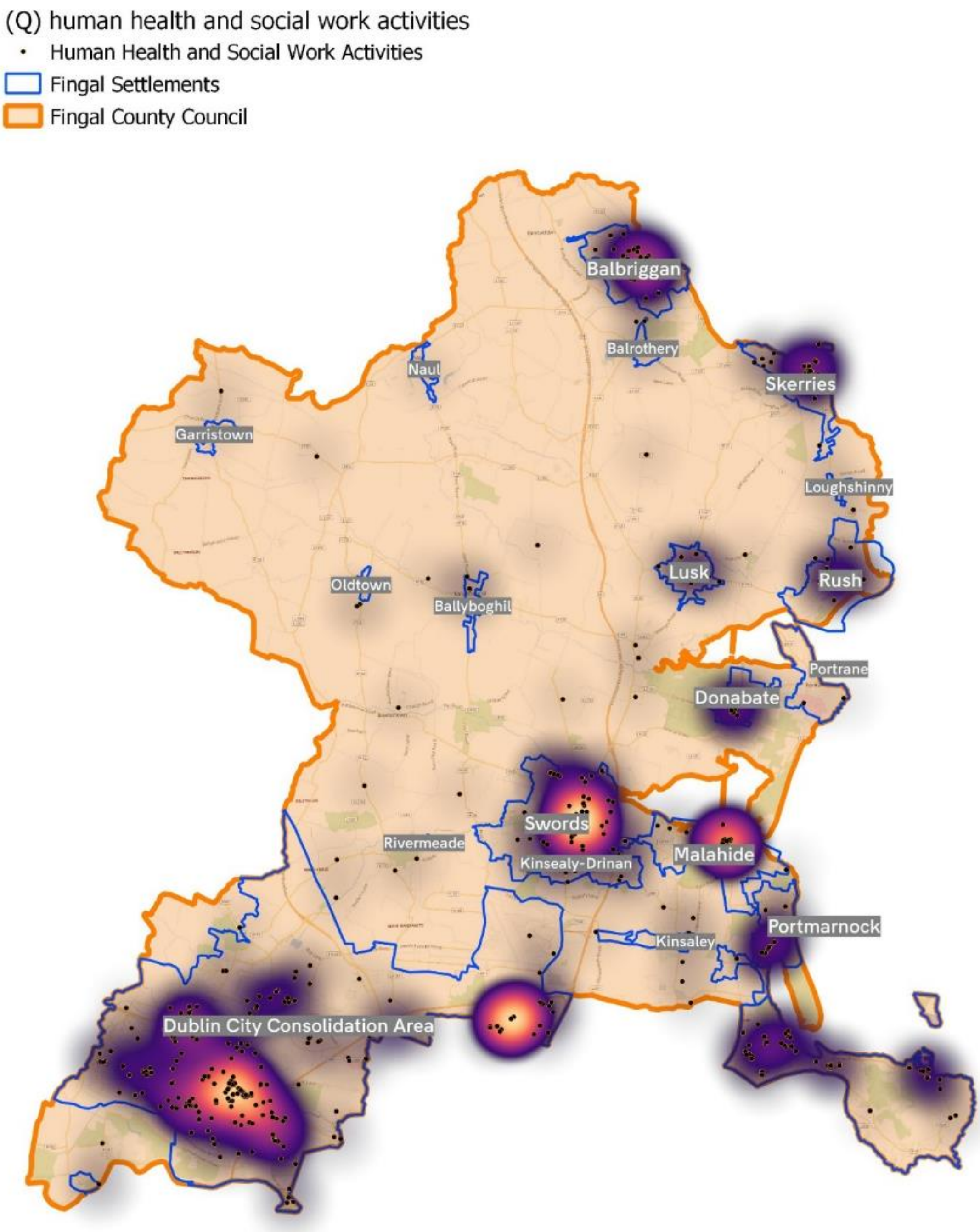

Figure 3-20: Human Health and Social Work Activities Properties in Fingal (Source: Geodirectory)

3 Socioeconomic Profile

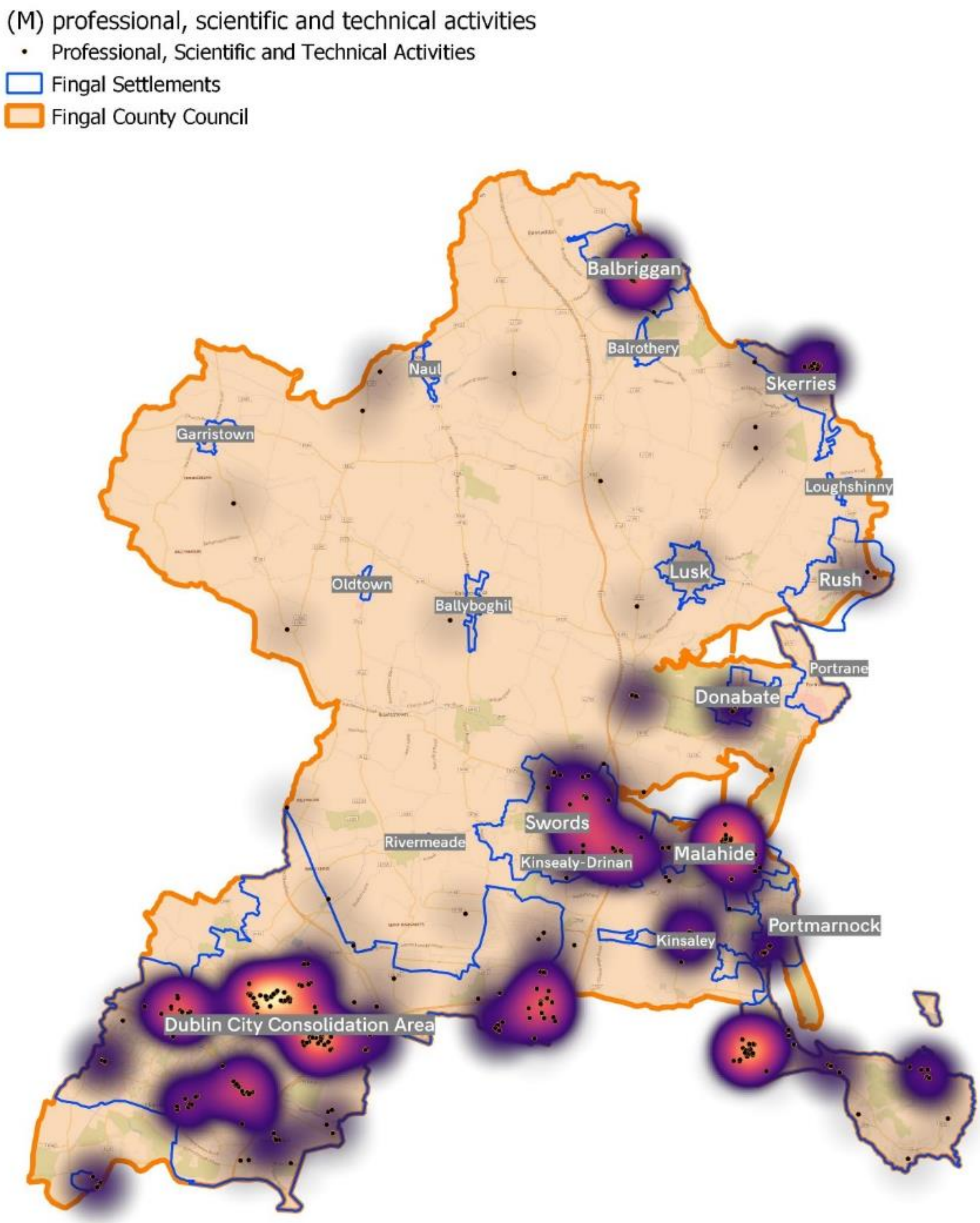

Figure 3-21: Professional, Scientific and Technical Activities (2020 Q4)

3.2.4.3 Context on Key Sectors

Overview

There are a number of key sectors and industries that contribute to employment and the economy as referenced in Sections 3.2.1.3 and 3.2.4.2 and summarised below. It should be noted that this will be discussed in further detail in the separate economic, employment and land use report.

Tourism

Dublin Airport is considered a significant employer within the transport industry and major contributor to the local and national economy. During 2019 Dublin Airport welcomed 32.9million passengers, supported 19,200 full time equivalent (FTE) jobs and contributed €1.7 billion Gross Value Added. Indirectly, Dublin Airport is estimated to facilitate 129,700 jobs and contribute €9.8billion Gross Value Added nationally in total which is equivalent to 3.1% of national Gross Domestic Product (InterVistas, 2019).

There are 565 Fáilte Ireland registered attraction assets within County Dublin, of which 58 are registered within Fingal (i.e. 10.3% of the total registered assets in Dublin). As illustrated in Figure 3-22, many are concentrated around the Dublin city consolidation area, Swords, Malahide, Dublin Airport and Howth.

Many of these attractions are associated with nature, heritage and the coastline particularly in Howth, Malahide, Skerries and Balbriggan. These are also a relatively high concentration around Dublin Airport (mostly associated with ground-based supporting services) and Blanchardstown (including the National Aquatic Centre, Draoícht theatre and Farmleigh House).

Retail and Hospitality

Given that Dublin Airport is Ireland's most important tourist entry point, Dublin overall and particularly parts of Fingal are a key destination in terms of national and international hospitality and retail. Activity in the retail, hospitality and the services sector has historically been in high demand across Dublin and within Fingal which is considered reflective of the national growth in this industry. Key retail establishments include the Pavilions in Swords and Blanchardstown Shopping Centre.

As illustrated in Figure 3-19, hospitality (by way of accommodation and food services) is strong in the settlements and in the vicinity of Dublin Airport. There are 331 Faílte Ireland registered accommodation assets within County Dublin, of which 63 are registered within Fingal County Council accounting for 19.0% of the total Dublin registered assets. A majority of accommodation points are concentrated around Swords, Dublin airport and the M1 leading into Dublin city.

3 Socioeconomic Profile

Two further clusters have been identified in Portmarnock-Malahide and Howth. The distribution of accommodation assets is illustrated in Figure 3-23.

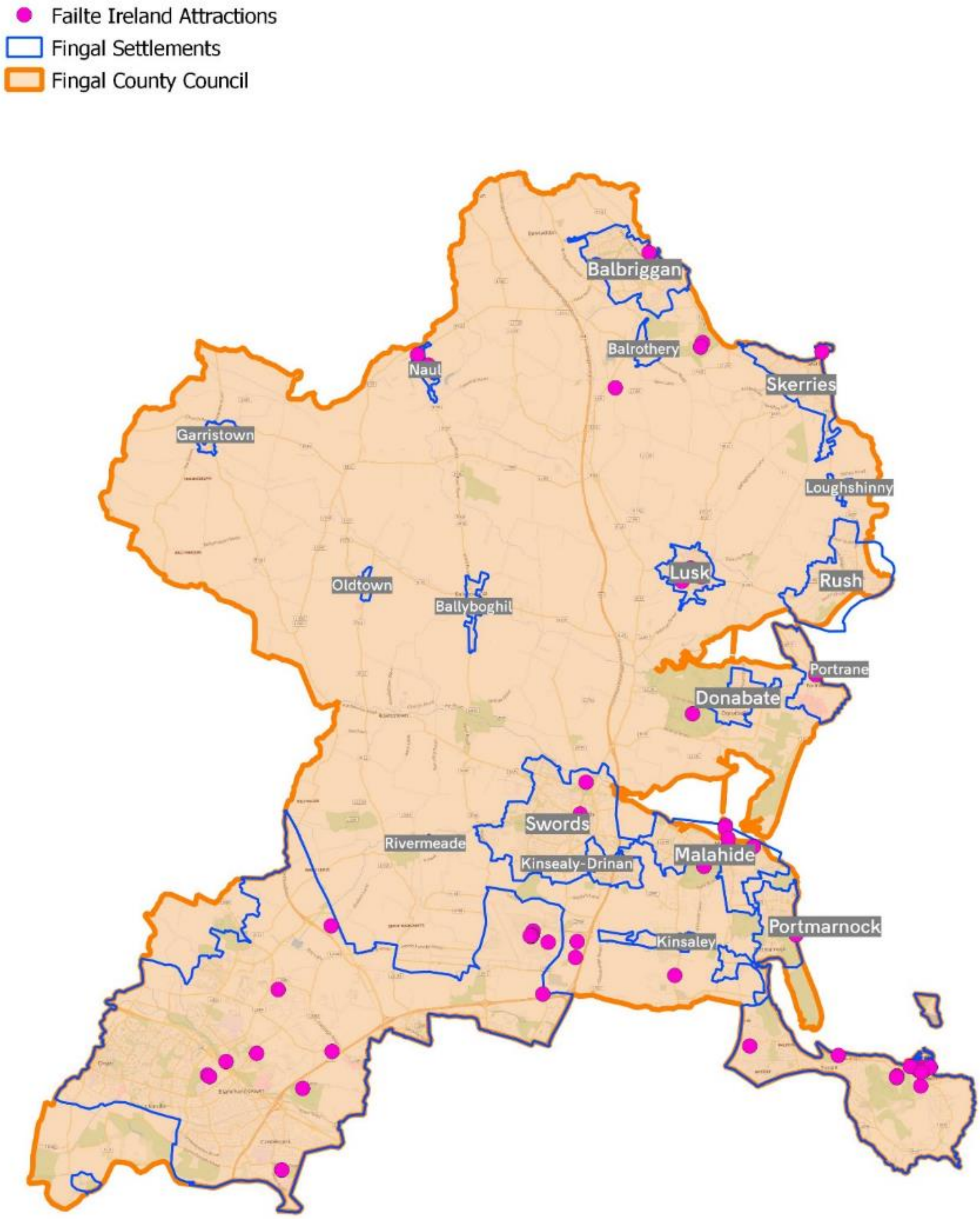

Figure 3-22: Attractions in Fingal (Source: Fáilte Ireland)

3 Socioeconomic Profile

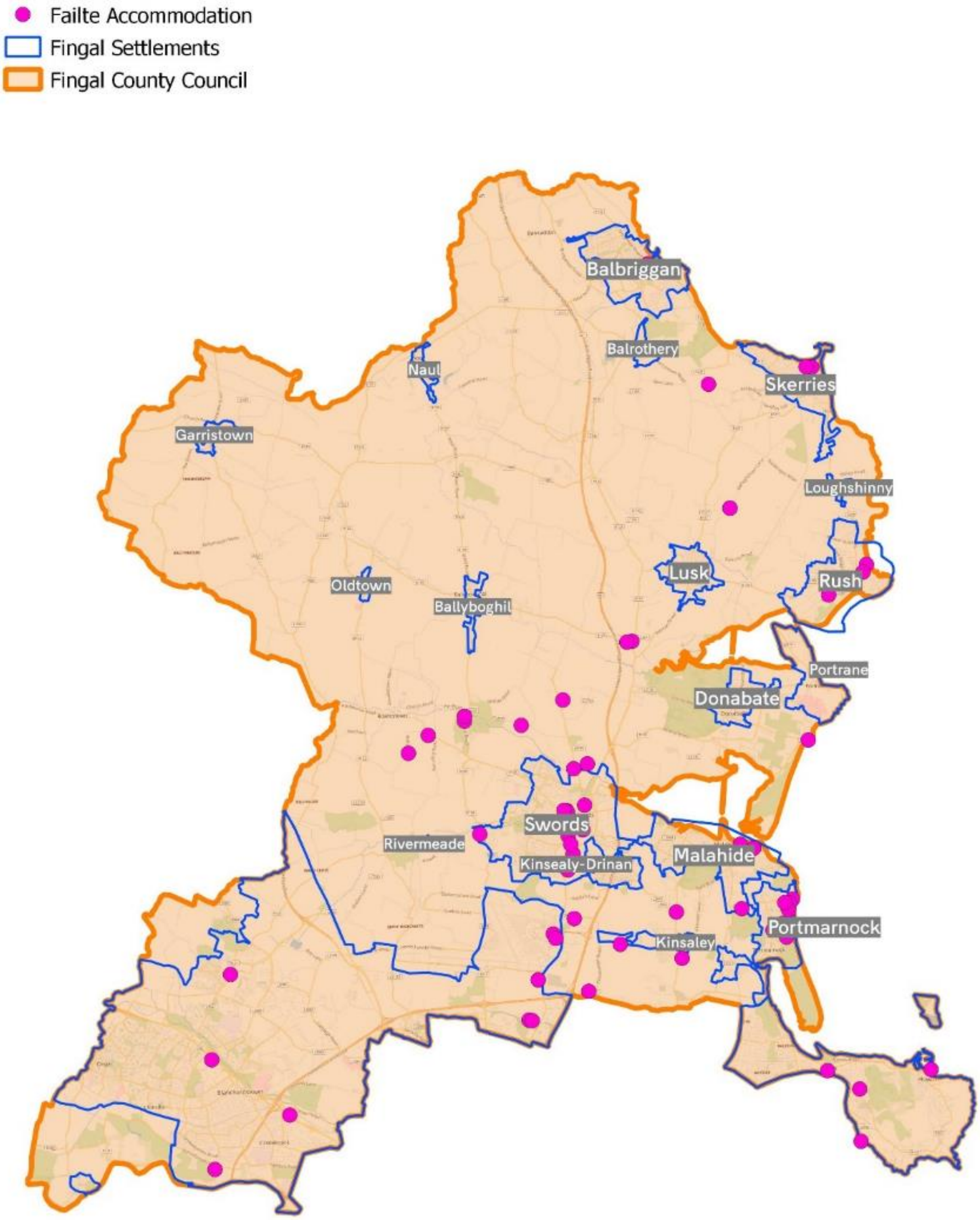

Figure 3-23: Accommodation in Fingal (Source: Fáilte Ireland)

3 Socioeconomic Profile

Information Technology and Communications

Technology and ICT industries are high value and well established across Ireland and Tech Ireland tracks a series of 2,700 technology related companies. As of the latest activity review report for 2020, a total of €707m in private funding across 243 companies was noted, although this represents a 25% decline in comparison to the previous year.

Within Dublin, 1,067 tech start-ups have been identified. The majority (almost two thirds) are located in Dublin City Council with approximately 50 start ups located in Fingal as illustrated in Figure 3-24. These are primarily distributed within the Dublin City consolidation area with notable clusters in Mulhuddart, Swords and around the airport along with the Howth – Malahide corridor.

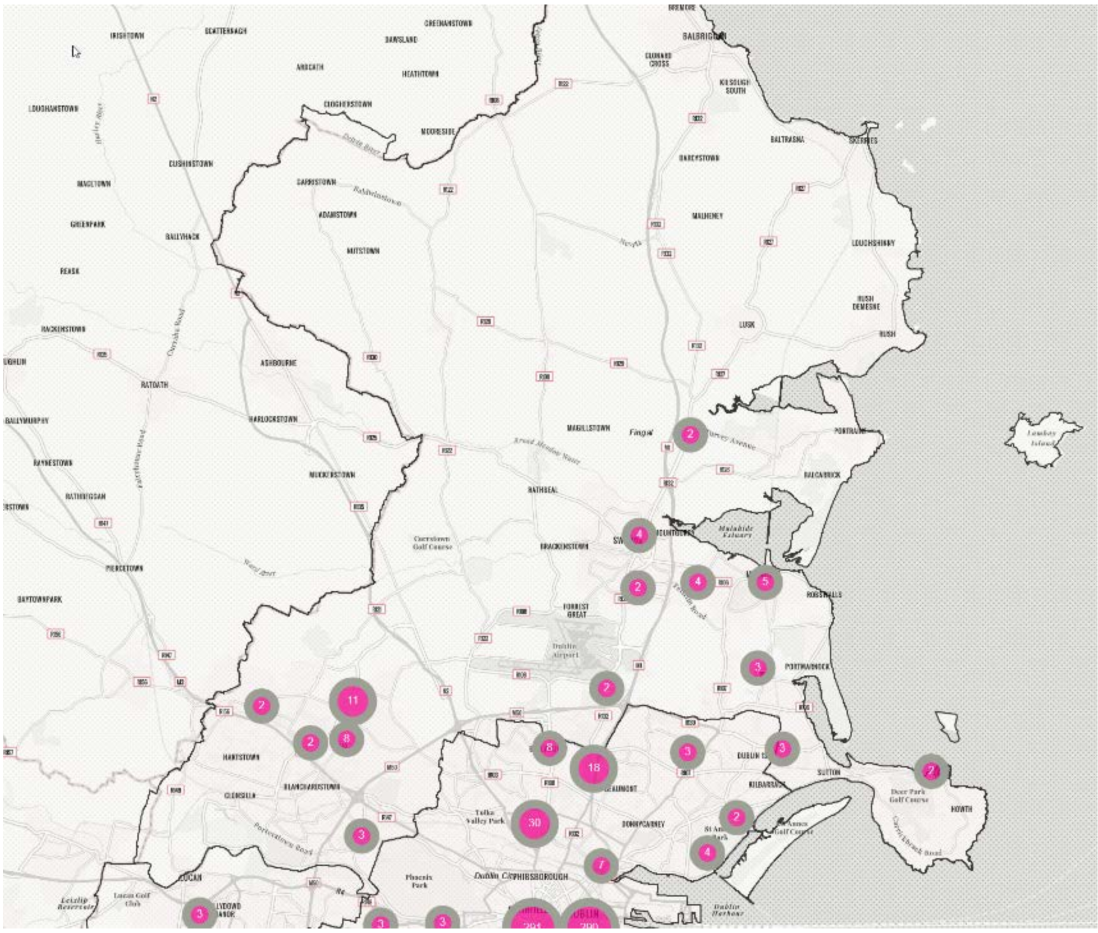

Figure 3-24: Start-ups in Dublin as identified by Tech Ireland

3 Socioeconomic Profile

Agriculture

There is over 176km^2 of agriculturally zoned lands in Fingal comprising over 177 zoned land parcels. The majority of agriculturally zoned lands are located in hinterland and rural areas within central and north western Fingal as shown in Figure 3-26.

The GeoDirectory data determined that there are 414 businesses within the agriculture, forestry and fishing sectors of which a vast majority have been identified as crop and animal production, hunting and related services activities (90.8%). Consistent with agricultural zoned lands, many of these properties are within central and north western Fingal as illustrated in Figure 3-25. A breakdown of sub-sectors within the Agriculture NACE code is provided in Table 3-18 to demonstrate the range of agriculture properties across Fingal.

Table 3-18: (A) Agriculture, Forestry and Fishing by sub-activity (2020 Q4)

Agriculture Sub-sector	Number	%
A - Crop and Animal Production, Hunting and Related Service Activities	376	90.8%
A - Growing of Other Non-Perennial Crops	1	0.2%
A - Growing of Other Tree and Bush Fruits and Nuts	4	1.0%
A - Growing of Spices, Aromatic, Drug and Pharmaceutical Crops	1	0.2%
A - Growing of Vegetables and Melons, Roots and Tubers	3	0.7%
A - Mixed Farming	1	0.2%
A - Plant Propagation	12	2.9%
A - Raising of Horses and Other Equines	11	2.7%
A - Raising of Poultry	1	0.2%
A - Support Activities for Crop Production	4	1.0%
A - Agriculture, Forestry and Fishing Total	414	100.0%

3 Socioeconomic Profile

Figure 3-25: Agriculture, Forestry and Fishing NACE codes by sub-sector (Source: Geodirectory)

3 Socioeconomic Profile

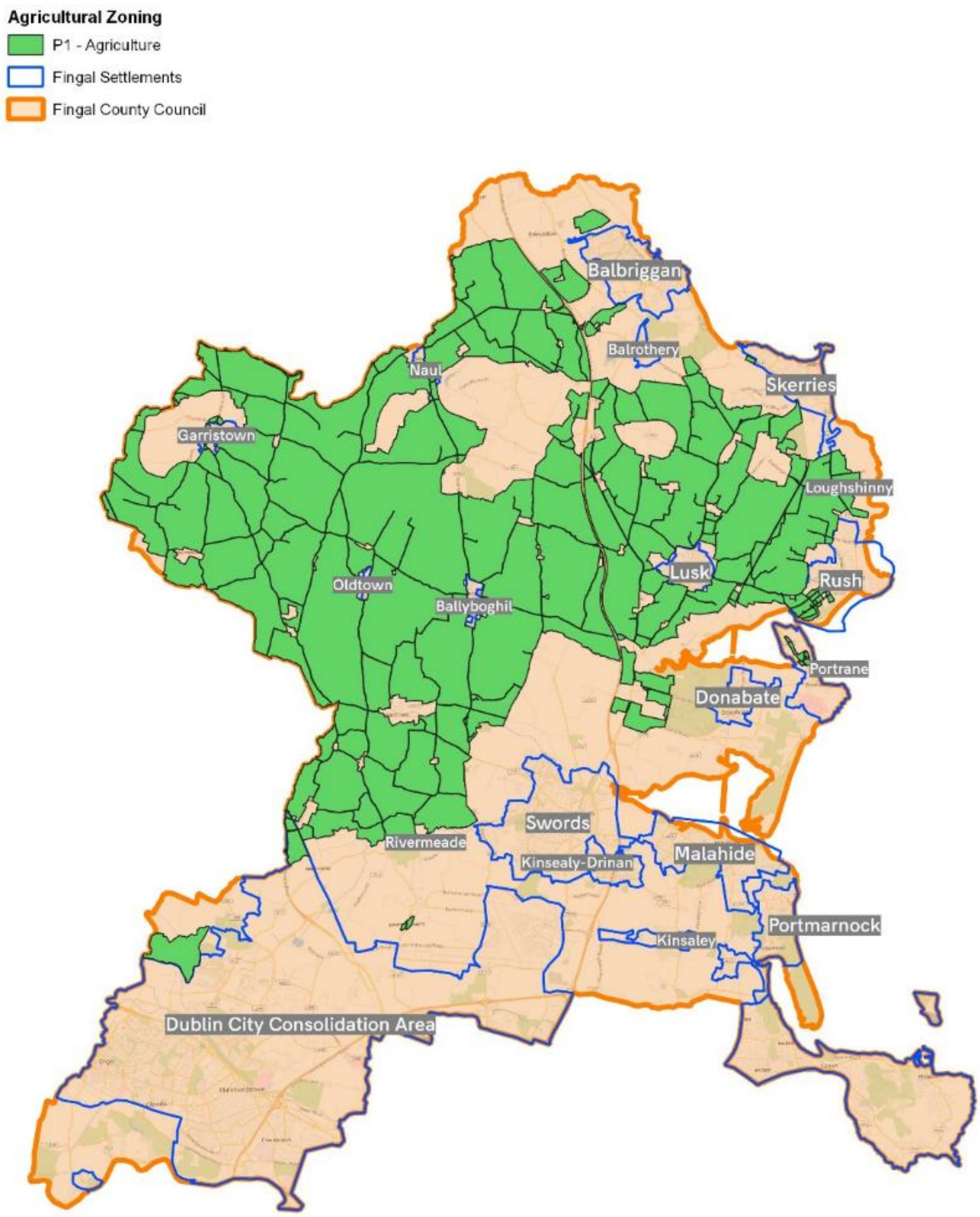

Figure 3-26: Agricultural zoned land in Fingal

Public Administration and Commerce and Trade

Public administration and commerce and trade are relatively large industries, particularly when compared to the State. Dublin is the administrative and commercial capital and as such it is a hub for employment in those industries. National and in some case multinational headquarters for administration, commerce and trade are evident and within Fingal specifically, these industries have developed in and around the motorway corridors, adjacent to retail and transport hubs and in proximity to the Airport.

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As evident from Figure 3-18 and Figure 3-20, the key settlements (particularly Blanchardstown and Swords) have larger proportions of wholesale and retail trade and human health and social work activities respectively. These may be considered relevant as hubs in the context of commerce and trade and public administration.

Valuations of Commercial Properties

Data from the Valuations Office is available in real time in relation to understanding commercial property prices in Fingal. This data was obtained in January 2021 and the categories of properties presented herein are defined by the Valuations Office. It should be noted that this will further be discussed in the separate economic, employment and land use report.

Valuations data per category is set out in Table 3-19 and illustrated by category in Figure 3-27. There are over 16,500 properties identified and valued in Fingal with particularly high density of properties evident within settlement boundaries. The majority are identified as industrial uses (48.4%), retail shops (30.5%) and office spaces (13.8%). The most valuable category is industrial uses, likely given the number of properties. However, the most valuable category on average (i.e. valuation per property) is utilities at €31,019,580 which may be attributable to the relatively low sample size. The next most valuable category on average is health at €373,393 per property whilst the lowest average was for retail shops at €81,133 per property.

Table 3-19: Valuations by Category

Category	No. properties	% of properties	Valuation
Industrial Uses	7,998	48.4%	€1,332,876,000
Retail (Shops)	5,044	30.5%	€409,236,630
Office	2,282	13.8%	€196,137,250
Retail (Warehouse)	366	2.2%	€113,914,770
Miscellaneous	269	1.6%	€96,385,060
Leisure	267	1.6%	€28,543,890
Hospitality	158	1.0%	€37,074,810
Fuel/Depot	63	0.4%	€19,247,700
Health	56	0.3%	€20,910,000
Minerals	11	0.1%	€2,776,500
Utility	5	0.0%	€155,097,900
Total	16,519	100.0%	€2,412,200,510
Of all valuations with valid categorisation			

3 Socioeconomic Profile

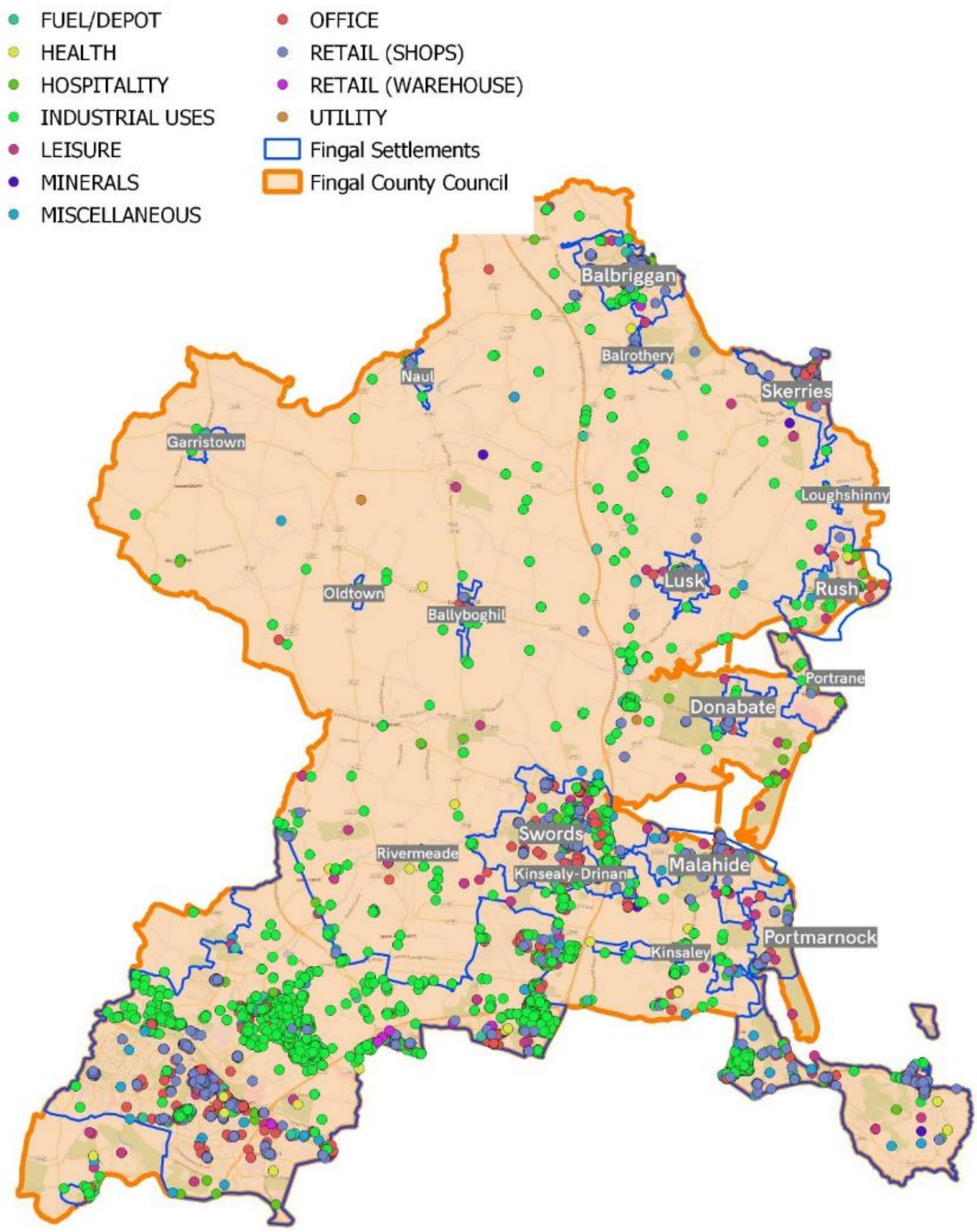


Figure 3-27: Valuations in Fingal County Council by Category (Source: VO)

3.2.5 Survey on Income and Living Conditions

3.2.5.1 Overview

The latest national Survey on Income and Living Conditions (SILC) was published in 2020. This survey collects data on income and living conditions for households across Ireland to understand income, poverty and deprivation. The survey originally started in 2003. The reference period for the most recent update was conducted from January 2018 to December 2019, achieving a sample size of more than 4,000 households and 10,700 people.

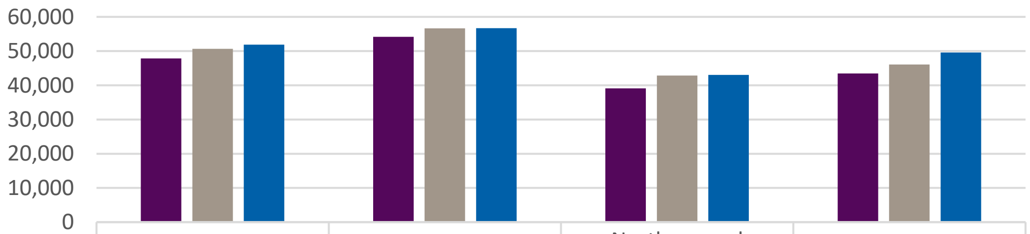
It should be noted that SILC data is only available at regional level (i.e. Eastern and Midlands) and is partially derived from the Pobal deprivation index which has been described in detail Section 3.1.6. It is important to note that in many cases this data is national due to limitations in the published data.

Incomes included in this analysis represent the mean (average), real (adjusted for inflation) and equivalised (adjusted to account for household size) as reported by the CSO[4]. Specifically, insight into income and poverty has been determined as they relate to deciles (i.e. roughly 10% proportions of households), sex, age, economic status, education, composition, urban/rural and by region.

3.2.5.2 Incomes per region

The mean real household disposable income for the state was €51,864 in 2019 which represented 2.4% annual growth. The region by comparison was 9.4% higher (at €56,717) but annual growth was relatively low (just 0.1%). Further, when compared to the other regions, the strength of household income in the region was evident as it was 31.8% higher than the Northern and Western region (€43,026) and 14.4% higher than the Southern Region (€49,583). This is indicative of higher household earnings on average in the region which has been the case in recent years as illustrated in Figure 3-29.

[4] Further details are available from: https://www.cso.ie/en/media/csoie/releasespublications/documents/ep/surveyonincomeandlivingconditions/2019/income/PR_xxxx_Silk_Fact_Sheet.pdf

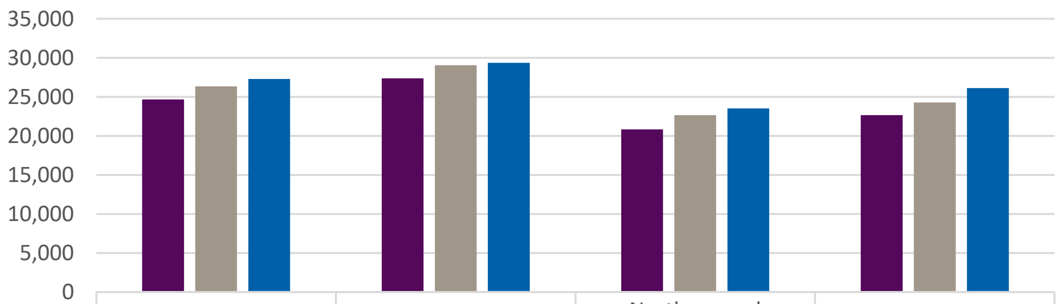


	State	Eastern and Midland	Northern and Western	Southern
2017	47,870	54,177	39,097	43,447
2018	50,640	56,646	42,829	46,097
2019	51,864	56,717	43,026	49,583

Figure 3-28: Mean Real Household Disposable Income (Source: SILC)

This data has been equivalised (i.e. adjusted to account for household composition) as set out in Figure 3-29. The average equivalised disposable income for the State was €27,782 in 2019 which represented 3.6% annual growth. The region by comparison grew by 1.1% to €29,368.

The average equivalised disposable income for the region was therefore 7.6% higher than the state, 24.8% higher than the Northern and Western region (€23,526) and 12.4% higher than the Southern region (€26,120) in 2019. This is indicative of higher earnings per individual on average in the region and the decline in the gap between the region and other regions following equivalisation of incomes indicates likely larger household sizes in the region.



	State	Eastern and Midland	Northern and Western	Southern
2017	24,671	27,379	20,827	22,667
2018	26,340	29,057	22,651	24,273
2019	27,282	29,368	23,526	26,120

Figure 3-29: Mean Equivalised Disposable Income (Source: SILC)

3.2.5.3 *Incomes per decile*

SILC data is available at decile level for the state income which facilitates association of households into 10 groups for the analysis of gross and disposable incomes. The monthly[5] equivalised income per decile across the State is presented in Table 3-20.

Table 3-20: State monthly equivalised income per decile (Source: SILC)

Decile	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th
Total Direct Income	276	429	732	1,203	1,487	2,017	2,402	2,972	4,177	7,056
Gross Income	901	1,197	1,462	1,741	2,035	2,471	2,902	3,460	4,520	7,777
Total Tax and Social Contributions	49	60	140	243	319	507	675	893	1,452	2,712
Net Disposable Income	852	1,137	1,322	1,499	1,716	1,964	2,227	2,567	3,069	5,065

Using the relative difference between the mean equivalised disposable income for the state and region, an approximation has been provided per decile for the region. This assumes that the sample size has been adapted to reflect the region and thus, provides monthly equivalised income per decile as set out in Figure 3-30.

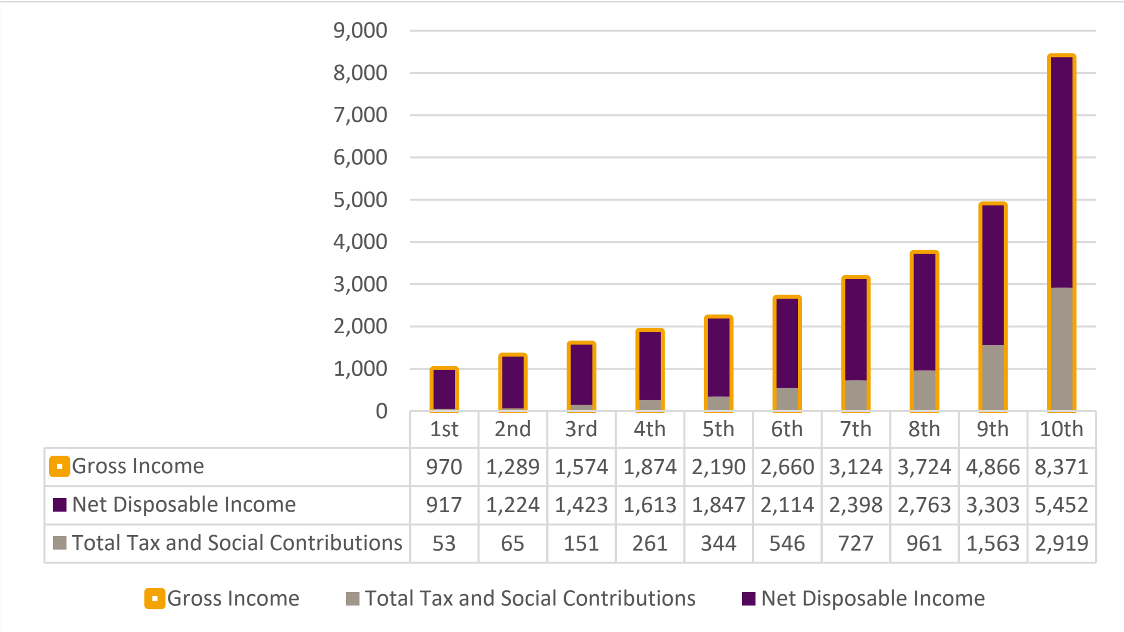


Figure 3-30: EMRA monthly equivalised income per decile (Source: SILC)

[5] Data originally sourced as weekly income. A 4x multiplier has been applied to indicate monthly values.

3.2.5.4 Income by Demographic Characteristics

SILC also provides insight into the influence of demography on income and living conditions. Mean real equivalised income per person at state level has a breakdown by demographic characteristic as presented below in Table 3-21. In order to relate this state-level information to the region, income by characteristic has been increased by 7.6% (i.e. the relative income for the region compared to the state). This provides an indication of income by characteristic in the region however it is an approximation.

Some key insights for the influences of demography on income in the region are as follows:

- There is little variability in income by gender as the mean income for males just 0.08% higher than females.
- The mean income of the working cohort (18-64 years) is significantly higher than those in the 0-17 or 65+ cohorts. The working cohort has an income 13.0% higher (€3,566) than the 0-17 cohort and 16.7% higher (€4,429) than the 65+ cohort.
- As is to be expected, the mean income of those at work is highest of all.
- There is a direct correlation between mean income and increasing levels of educational attainment. For those who have attained a third level degree or above earning 54.3% (€14,399) more than those with just a leaving certificate.
- Generally, households with more adults have higher income than other household compositions. The highest earners are households with two adults under the age of 65, likely indicating dual earning family units. This is further reflected by the relationship between income and number of persons at work per household.
- Tenure type is also reflective of significant differences in income. Those who reside in owner-occupied accommodation have incomes 33.5% (€8,003) higher than those who rent or live rent free.
- Income levels in urban areas are 7.5% (€2,112) higher than those in rural areas although data indicates that over the 2018-2019 period the gap between urban and rural incomes narrowed with higher yearly growth sustained in rural areas.

Table 3-21: Mean real disposable income by demographic characteristic (Source: SILC)

Indicator	State	Estimated EMRA
Income	27,282	29,368
Sex		
Male	27,293	29,380
Female	27,271	29,356
Age group		
0-17	25,397	27,339
18-64	28,710	30,905
65+	24,596	26,477
Principal Economic Status		
At work	32,396	34,873
Unemployed	18,916	20,362
Student	23,478	25,273
Home duties	20,852	22,446
Retired	25,009	26,921
Not at work due to illness or disability	18,096	19,480
Highest education level attained		
Primary or below	18,535	19,952
Lower secondary	22,487	24,206
Higher secondary	26,156	28,156
Post leaving cert	24,650	26,535
Third level non degree	30,124	32,427
Third level degree or above	38,026	40,933
Household composition		
1 adult aged 65+	21,429	23,067
1 adult aged <65	27,840	29,969
2 adults, at least 1 aged 65+	26,012	28,001
2 adults, both aged <65	33,875	36,465
3 or more adults	30,576	32,914
1 adult with children aged under 18	19,450	20,937
2 adults with 1-3 children aged under 18	28,337	30,504
Other households with children aged under 18	23,029	24,790
Number of persons at work in the household		
0	18,288	19,686
1	25,665	27,627
2	32,209	34,672
3+	32,784	35,291
Tenure status		
Owner-occupied	29,613	31,877
Rented or rent free	22,178	23,874
Urban/rural location		
Urban areas	27,889	30,021
Rural areas	25,927	27,909

3.3 Emerging Trends

3.3.1 COVID-19

Up to March 2021, there have been 219,512 cases of COVID-19 in Ireland and 4,319 deaths. An overview of national cases and hospitalisations with reference to the age profile is illustrated in Figure 3-31. Of those, approximately 75,958 occurred in County Dublin.

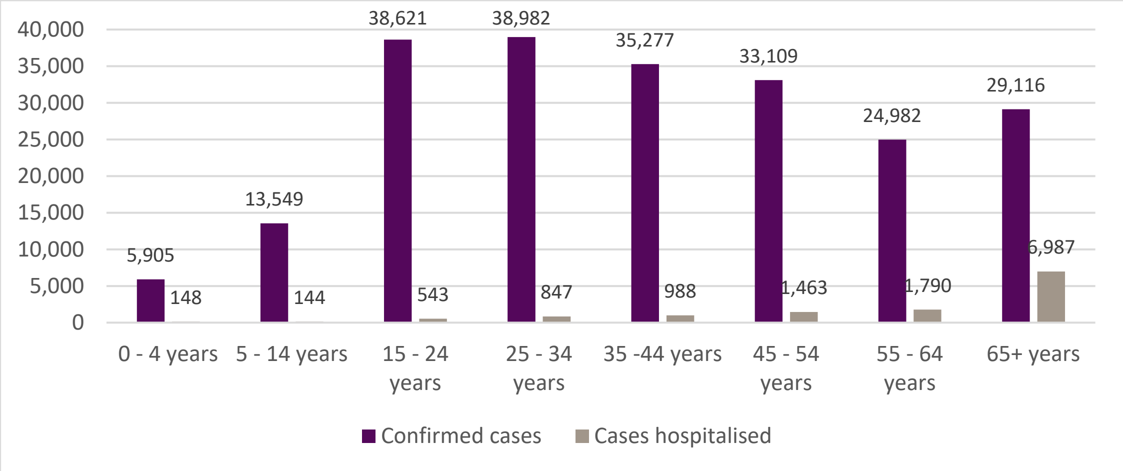


Figure 3-31: Total Confirmed Cases and Hospitalisations for COVID-19 by Age in Ireland (Source: Government of Ireland

There is a time series overview specifically for those Local Electoral Areas within Fingal provided in Figure 3-32. This demonstrates significant variance over time and between the areas within Fingal. Swords, Blanchardstown-Mulhuddart and Howth-Malahide were worst affected during the peak (or third wave) with highs of approximately 1,800, 1,700 and 1,700 cases respectively in the second week of January 2021. Balbriggan and Rush-Lusk were the least affected with peaks of approximately 870 and 1,200 cases at the same time.

3 Socioeconomic Profile

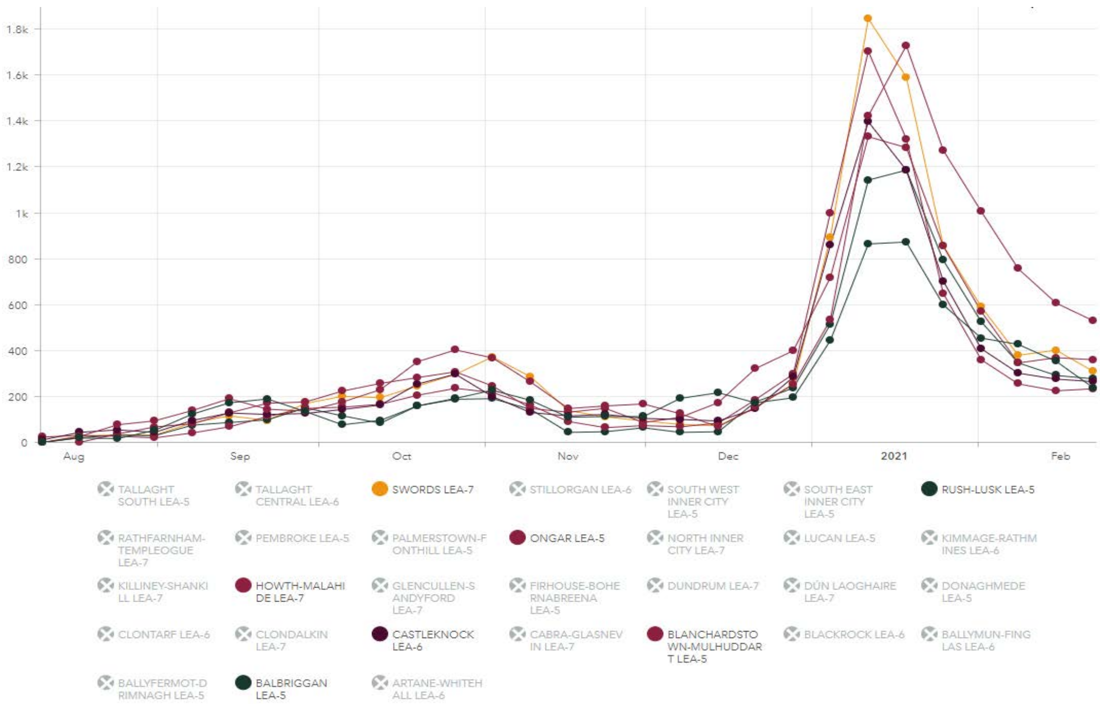


Figure 3-32: Confirmed COVID-19 Cases over time in the Local Electoral Areas in Fingal

Whilst the future of the COVID-19 is unclear at the time of writing, analysis was undertaken by the Eastern and Midlands Regional Assembly in May 2020 to understand potential impacts at the regional, county and settlement level. This analysis developed a COVID-19 exposure ratio per area and determined that the Eastern and Midlands Region is least exposed of all regions whilst Dublin is the least exposed of all sub-regions, counties and cities in the country. The following towns within Fingal were identified as being exposed to significant economic disruption caused by COVID-19:

- Rush was identified as the sixth most exposed settlement nationally with an exposure ratio of 59.6% as 81 units operate in sectors likely worst affected;
- Balrothery was identified as the eighth most exposed settlement nationally with an exposure ratio of 58.8% as 10 units operate in sectors likely worst affected;
- Skerries was identified as the twelfth most exposed settlement nationally with an exposure ratio of 56.9% as124 units operate in sectors likely worst affected;
- Other towns identified as being exposed across Fingal include:
- Portmarnock has an exposure score of 53.9%
- Lusk has an exposure score of 48.5%

- Malahide has an exposure score of 47.4%
- Balbriggan has an exposure score of 47.2%
- Donabate has an exposure score of 44.6%
- Kinsealy – Drinan has an exposure score of 28.8%.

Dublin Airport was particularly vulnerable economic contributor due to the international travel restrictions and decline in passenger numbers which is described in further detail in Section 4.2.1. As an essential service Dublin Airport continued to operate and facilitated the importation of personal protective and other medical equipment, facilitating the arrival of 6.2 million tonnes of equipment on 357 separate cargo flights, operated by 16 different airlines. Further two rapid COVID-19 testing facilities opened at Dublin Airport in November 2020.

However, many employees at Dublin Airport (i.e. airline, airport and associated service support staff for other entities operating there) both living in and adjacent to Fingal have also been working less hours, furloughed and offered voluntary redundancies and career breaks due to the impact of COVID-19. Whilst the Pandemic Unemployment Scheme and associated Government supports have been available to those in need, it is unclear how COVID-19 may impact Dublin Airport in the long term.

The impacts of COVID-19 have also been felt more broadly by many businesses and sectors. As illustrated in Figure 3-33, the Central Bank of Ireland has found that the range of businesses taking payment breaks varies greatly across sectors and scale

	SME			Large Corporate			All firms		
	OB (€m)	PB (€m)	PB(%)	OB (€m)	PB (€m)	PB(%)	OB (€m)	PB (€m)	PB(%)
A – Agriculture, Forestry & Fishing	2,443	146	6.0	1,075	50	4.6	3,519	195	5.6
C – Manufacturing	1,493	289	19.4	2,062	139	6.7	3,555	428	12.0
F – Construction	471	78	16.6	709	46	6.5	1,180	124	10.5
G – Wholesale & Retail	2,559	625	24.4	1,292	197	15.3	3,852	822	21.3
H – Transportation & Storage	683	202	29.5	709	37	5.2	1,392	238	17.1
I – Accommodation & Food	2,506	1,475	58.9	1,113	219	19.7	3,619	1,695	46.8
J – Information & Communication	255	28	11.0	182	10	5.4	437	38	8.7
L – Real Estate	7,104	1,234	17.4	2,937	278	9.5	10,041	1,512	15.1
M – Prof., Technical & Scientific	560	133	23.7	275	18	6.5	835	151	18.0
N – Administrative & Support Services	936	248	26.5	298	21	7.1	1,234	269	21.8
P – Education	274	39	14.3	223	10	4.5	496	49	9.9
Q – Human Health	1,071	260	24.3	764	84	11.0	1,835	344	18.7
R – Arts, Entertainment & Recreation	247	111	44.8	370	18	4.8	617	129	20.8
S – Other Services	378	126	33.3	261	67	25.6	638	192	30.1
Other	202	41	20.1	797	1	0.2	999	42	4.2
	21,181	5,034	23.8	13,068	1,194	9.1	34,248	6,228	18.2

Figure 3-33: Overview of payment breaks (PB) on outstanding balances (OB) by sector in Ireland to May 2020 (Source: Central Bank of Ireland 2020)

This has also filtered down to households as illustrated by the range of private dwelling house (PDH) borrowers and buy to let borrowers that took payment breaks on their mortgage as illustrated in Figure 3-34. Specifically, this relates to those mortgages at the five major retail banks, however this group covers over 67,000 accounts and €9.4billion balance and it indicated that PDH borrowers are slightly more likely to have payment breaks ~~that~~ buy-to-let borrowers. Further information in relation to unemployment and COVID-19 financial supports are provided in Section 3.2.2.

	Accounts	Payment breaks	%	Balance (€ bn)	Payment break balance (€ bn)	%
Total	**748,249**	**73,960**	**10**	**94.94**	**10.46**	**11**
PDH: First-time buyer	248,794	23,804	10	35.47	3.60	10
PDH: Second-time/subsequent buyer	425,383	43,530	10	49.19	5.79	12
Buy-to-let	74,072	6,626	9	10.28	1.08	10

Figure 3-34: Payment breaks of mortgages by borrower type to end of May 2020 (Source: Central Bank of Ireland 2020)

Overall, the significant impact of COVID-19 on socio-economic circumstances has been evident nationally and in Fingal. The legacy of the COVID-19 shock is still substantial and is likely to impact the domestic economy and labour market for some time. Further, continued restrictions will exacerbate impacts on the more vulnerable such as the elderly, those living alone, socially isolated, out of work and/or those on financial supports.

The future of COVID-19, associated direct and indirect social, economic and socio-economic impacts on individuals, communities, businesses and employees is unclear, but it is evident that all policy should be agile and flexible to respond to COVID-19 or indeed any other future pandemics that may occur such that impacts within Fingal can be minimised in so far as practicable through advisory, upskilling and socio-economic initiatives.

3.3.2 Brexit

On 23 June 2016, the UK voted to leave the EU in a referendum and after a number of delays and extensions, the UK departed on 31 January 2020. The UK was then in a transition period and since 1 January 2021, a Trade and Cooperative Agreement has been provisionally applied (until fully reviewed by the European Commission). This governs matters that were previously dealt with under EU law including trade of goods, movement of people as well as a Protocol on Ireland and Northern Ireland which is of particular relevance to Fingal given proximity and strategic location along the Belfast-Dublin travel corridor.

3 Socioeconomic Profile

A range of Brexit related shocks and stresses have been identified by various entities nationally and some of the key consequences to take note of in relation to socioeconomics include:

- The Common Travel Area between Ireland and the UK continues to be recognised along with the rights it grants to Irish. British citizens continue to have the right to live and work in Ireland and the same applies to Irish citizens who wish to continue living in the UK. For other EU citizens, the UK has set up an EU Settlement Scheme, under which EU citizens (from countries other than Ireland) and their family members living in the UK can apply to continue living there after 30 June 2021.
- A frontier worker is a person who lives in one country but works in another country. For instance, if you live in the Republic of Ireland and work in Northern Ireland, you are a frontier worker. A Frontier Work Permit or visa may be necessary to work in the UK from 1 January 2021; however, this does not apply to Irish citizens as they are protected by way of the Common Travel Area.
- The current arrangements for social security between Ireland and the UK have not changed.
- Irish businesses have quota and tariff free access to the UK – this is a key benefit of the deal.
- Special rules for trading in goods apply to Northern Ireland, which ensures that Northern Irish businesses can continue to trade with the EU on a tariff free basis without any customs declarations or border checks whilst also enjoying access selling into the British market. Goods moving between Ireland and Northern Ireland will not have any customers, tariffs, or other restrictions placed on them. However, goods moving from Northern Ireland to another part of the UK and vice versa now require additional paperwork and checks.
- There are non-tariffs costs on trade between the EU and the UK. This results in more forms to be filled in, more tests and new labelling requirements for many products. There is also time and cost involved in getting used to the new rules and putting new systems and processes in place.
- The Rules of Origin have been modified – these determine if a good qualifies for tariff free treatment. Many businesses have already seen these rules may require them to reconfigure their supply chain.

3 Socioeconomic Profile

- Purchasing goods online from the UK has become more expensive and complicated. This is due to additional import and Value Added Tax charges and it should be noted that EU consumer protection legislation no longer applies, and your consumer rights are in accordance with UK law.
- The lack of extensive detail on the provision of services between the EU and the UK. This will depend on the nature of the service and on what agreements are reached in the future between the professional bodies in the UK and each EU country on the recognition of professional qualifications. It should be noted that there are provisions for specific sectors including aviation, energy, fishing and road transport however there is little on others such as financial services.
- There is an extensive new governance framework involving the establishment of a Partnership Council and many new Committees and Working groups to oversee the implementation of the agreement.
- There are provisions dealing with State Aid and what has become known as Level Playing Field conditions in areas such as labour laws, environmental standards and taxation, with specific provisions to deal with disputes in relation to these matters, however only time will tell how they operate in practice.
- Further agreements may be needed in the future to deal with Brexit. Specifically, the Trade and Cooperation Agreement itself will be reviewed every 5 years, with the first general review taking place by end 2025.
- In Northern Ireland, the long term application of the Protocol is up to the Northern Irish Assembly. Every four years after the end of the transition period, the Assembly can vote on whether it wants EU law on things like custom, duties and regulations, to continue or not. If they vote to end any part of the Protocol, the decision will come into effect two years later.

4 Travel Trends Analysis

4 Travel Trends Analysis

This chapter describes the travel trends within and across Fingal. This has been determined through analysis of a series of indicators at the county level with reflections against Dublin, the region and State provided as appropriate herein.

Section 4.1 describes the county profile in relation to travel trends such as commuting to and from Fingal. Section 4.2 sets out the macroeconomic trends that have been emerging and affecting travel trends nationally and regionally including the impact of Coronavirus (COVID-19), Brexit as of the new trade deal started at the outset of 2021 and infrastructure developments that may influence travel in Fingal going forward.

It should be noted that Section 5 outlines the travel trends within the settlements of Fingal based on the settlement hierarchy as described in Table 2-1.

4.1 Travel profile across Fingal

Fingal is a well-connected county with an extensive transport network that serves the population across urban and rural areas. Connectivity and travelling are important factors for the population as it can support inclusivity, equitability and accessibility and enable larger proportions of the population to access specific establishments that contribute to quality of life for example those that provide public services, education and employment. The transport infrastructure network therefore serves the travel needs of people and businesses within and beyond the county and can support future economic, social, physical and sustainable development within and across Fingal.

An overview of public transport and the road network is provided in Figure 4-1. The road network is dominant across both urban and rural areas with a network of strategic roads such as motorways (M1 and M50) and national roads (N2, N3). This is generally linked via regional (R132, R107, R108 etc.) and local roads (L2060, L1285 etc.), providing access to smaller towns and centres. Many of the larger roads have dedicated and informal pathways that support cyclists and pedestrians and connect with the broader Greater Dublin Area Cycle Network. It should also be noted that design and planning is ongoing to extend the recently launched Royal Canal Greenway into Castleknock whilst consent was granted for the Broadmeadow Greenway in 2020. Overall, motorways and national roads spur from the city centre and M50 orbital whilst regional and local roads are most common towards the north and west in the rural parts of Fingal.

4 Travel Trends Analysis

Generally, the railway (including DART as far north as Malahide and Howth) extends from the city centre along the eastern coastline onto Drogheda, Dundalk and terminating at Belfast. This is a major link between Belfast and Dublin and a well-used commuter route for those settlements that are served. Sections of the Dublin to Kildare and Dublin to Navan (i.e. via Clonsilla and M3 parkways) railway lines are also within Fingal to the west. There is also a vast bus network which is generally more extensive across the larger settlements and urban parts of the county which also connects to many inter-county destinations particularly as there are many national bus routes that serve Dublin Airport.

Further, Fingal is a hub for international travel due to the presence and dominance of Dublin Airport as well as proximity to Northern Ireland via the M1. There are a range of trip intensive land uses across the county including high density housing, offices and/or retail and employment hubs along with event spaces. This has been explored in this section to understand travel trends within, to and from Fingal County Council. An overview of the land use zoning across Fingal is provided in Figure 4-2 for context.

4 Travel Trends Analysis

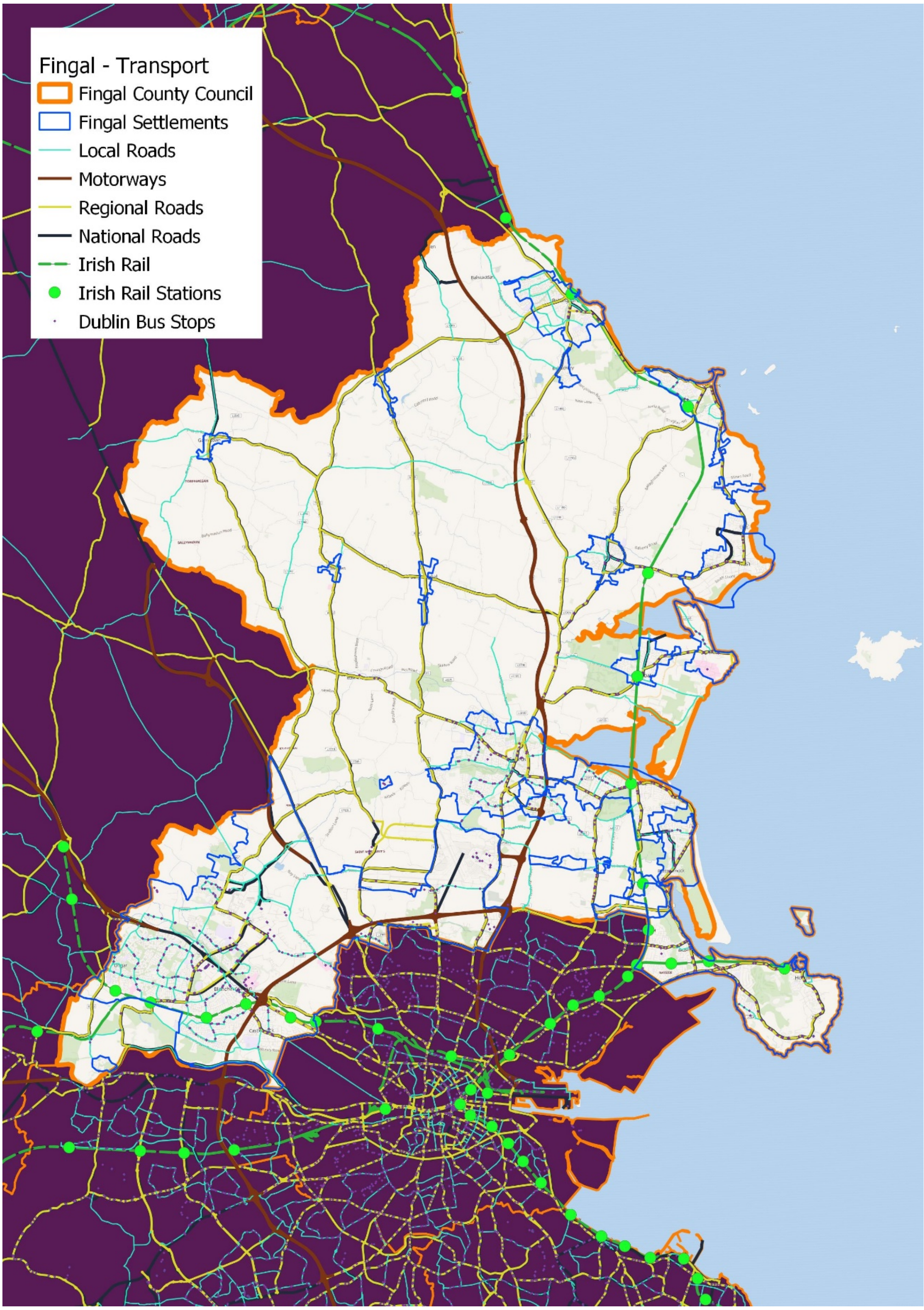


Figure 4-1 Overview of transport infrastructure in Fingal

4 Travel Trends Analysis

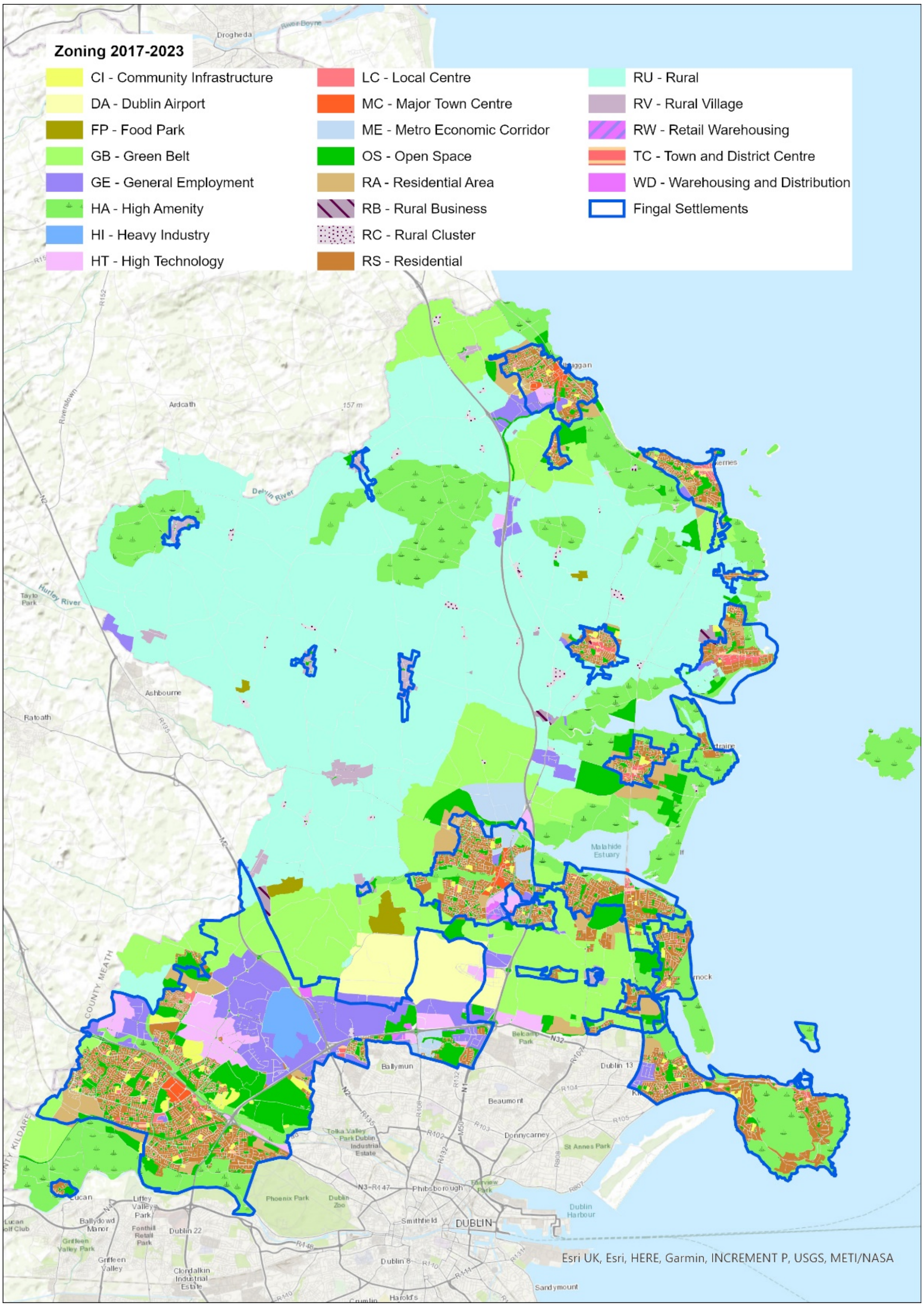


Figure 4-2: Land Use Zoning in Fingal

4 Travel Trends Analysis

4.1.1 Commuting from Fingal

POWSCAR contains records for 61.7% (182,696) of the total population of Fingal. The breakdown of destination for commuters in Fingal is set out in Table 4-1. It should be noted that further detail on the travel modes for commuting is provided in Section 3.2.3.

Analysis indicates that roughly half of all those from Fingal who work or attend education do so within the administrative boundary (49.9%) whilst a further 10,955 have no fixed place of work and 4,410 work from home. Assuming those that have no fixed place of work remain within Fingal, it has been determined that 106,572 persons that live within Fingal also work or attend education within Fingal (i.e. 55.9% of those recorded by POWSCAR).

Dublin City is the most common destination outside of the county followed by the other local authorities in Dublin and then the commuter and neighbouring counties of Meath, Kildare and Louth. All other areas, including international destinations have less than 1,000 commuters travelling to them from Fingal.

Table 4-1: Fingal commuters by destination (Source: POWSCAR 2016)

Location	Commuters	% recorded by POWSCAR
Fingal	**91,167**	**49.9%**
No fixed place of work	**10,995**	**6.0%**
Work/school from home	**4,410**	**2.4%**
Dublin City	56,998	31.2%
South Dublin	5,941	3.3%
Dún-Laoghaire Rathdown	4,872	2.7%
Meath	3,470	1.9%
Kildare	2,236	1.2%
Louth	1,025	0.6%
Other (<1,000)	1,238	0.7%
Overseas	220	0.1%
Northern Ireland	124	0.1%
Total	**182,696**	**100.0%**

4 Travel Trends Analysis

The breakdown of external destinations for commuters residing in Fingal by location is set out in Table 4-2. The number of residents who commute outside of the administrative boundary is 76,124 persons (i.e. 41.7% of those recorded by POWSCAR). 74.9% those who commute to an external location do so to Dublin City (56,998 people), followed by the other local authorities in Dublin (7.8% to South Dublin and 6.4% to Dun Laoghaire-Rathdown).

The other dominant destinations are Meath, Kildare and Louth (1.9%, 1.2% and 0.6% respectively). All other destinations have less than 1,000 commuters and it should be noted that 0.5% of commuters travel internationally (i.e. 0.3% to Northern Ireland and 0.2% overseas).

Table 4-2: Fingal commuters by external destination (Source: POWSCAR 2016)

Location	Commuters	% Commuters
Dublin City	56,998	74.9%
South Dublin	5,941	7.8%
Dún-Laoghaire Rathdown	4,872	6.4%
Meath	3,470	4.6%
Kildare	2,236	2.9%
Louth	1,025	1.3%
Other (<1,000)	1,238	1.6%
Overseas	220	0.3%
Northern Ireland	124	0.2%
Total	**76,124**	**100.0%**

Those who commute externally from Fingal for work or education have been mapped by Electoral Division in Figure 4-3. This illustrates that Dublin City centre is the key destination outside of the county which is to be expected given the dominance of the city centre for employment in particular. This is generally followed by areas bordering the county including Priorswood, Finglas, Ashtown, Donaghmore, Dunboyne and some other pockets including Maynooth, Clondalkin, Cherry Orchard, Tallaght-Fettercairn and Glencullen.

4 Travel Trends Analysis

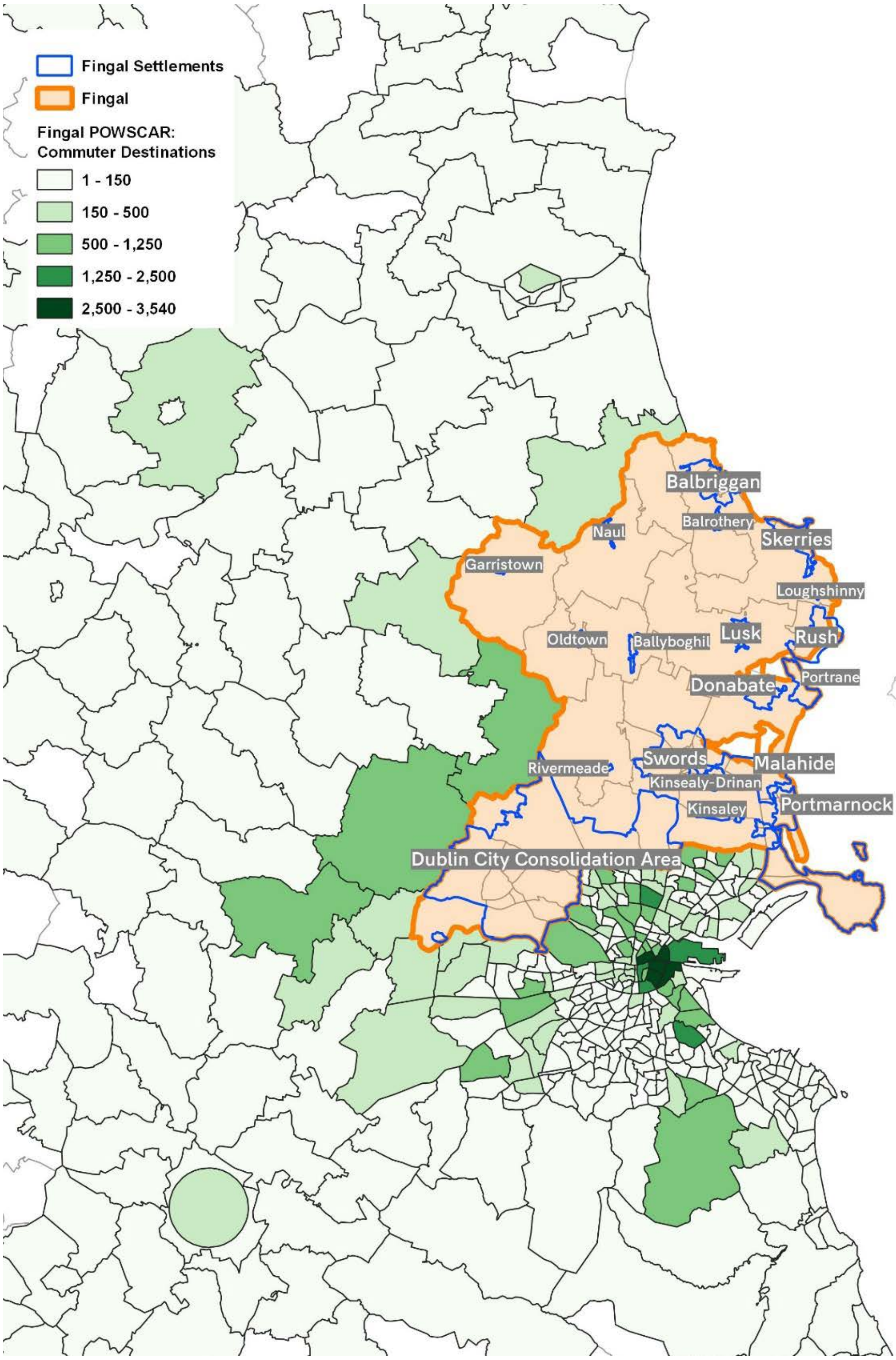


Figure 4-3: Fingal commuters by external destination (Source: POWSCAR 2016)

4.1.2 Commuting to Fingal

Analysis of the commuters that are resident outside of Fingal indicates that 52,332 people commute to Fingal County Council for work or education. Again, this is dominated by other local authorities within Dublin and the broader commuter belt of neighbouring counties.

Specifically, there is a strong link with Dublin City as was exhibited in those who commute from Fingal. 43.3% of external commuters who commute to Fingal come from Dublin City (22,668 people), followed by Meath (21.6%), South Dublin (9.9%), Kildare (7.0%), Louth (5.2%) and Dun Laoghaire-Rathdown (4.1%).

The breakdown of external residents who commute to Fingal is set out in Table 4-3.

Table 4-3: External commuters to Fingal by origin (Source: POWSCAR 2016)

Location	Commuters	% Commuters
Dublin City	22,668	43.3%
Meath	11,321	21.6%
South Dublin	5,199	9.9%
Kildare	3,645	7.0%
Louth	2,727	5.2%
Dún-Laoghaire Rathdown	2,150	4.1%
Wicklow	864	1.7%
Cavan	516	1.0%
Westmeath	476	0.9%
Other	2,766	5.3%
Total	**52,332**	**100.0%**

The breakdown of external residents who commute to Fingal is illustrated by Electoral Division in Figure 4-4. The main source of commuters in Dublin City includes neighbouring Ballymun, Grange, Ashtown and Lucan-Esker along with Clontarf East, Priorswood and other areas of Grange. In County Meath, Stamullen, Julianstown, St Mary's and Navan Rural and Trim Rural dominate and Leixlip, Celbridge, Maynooth, Naas Urban and Clare are the key origins in County Kildare.

4 Travel Trends Analysis

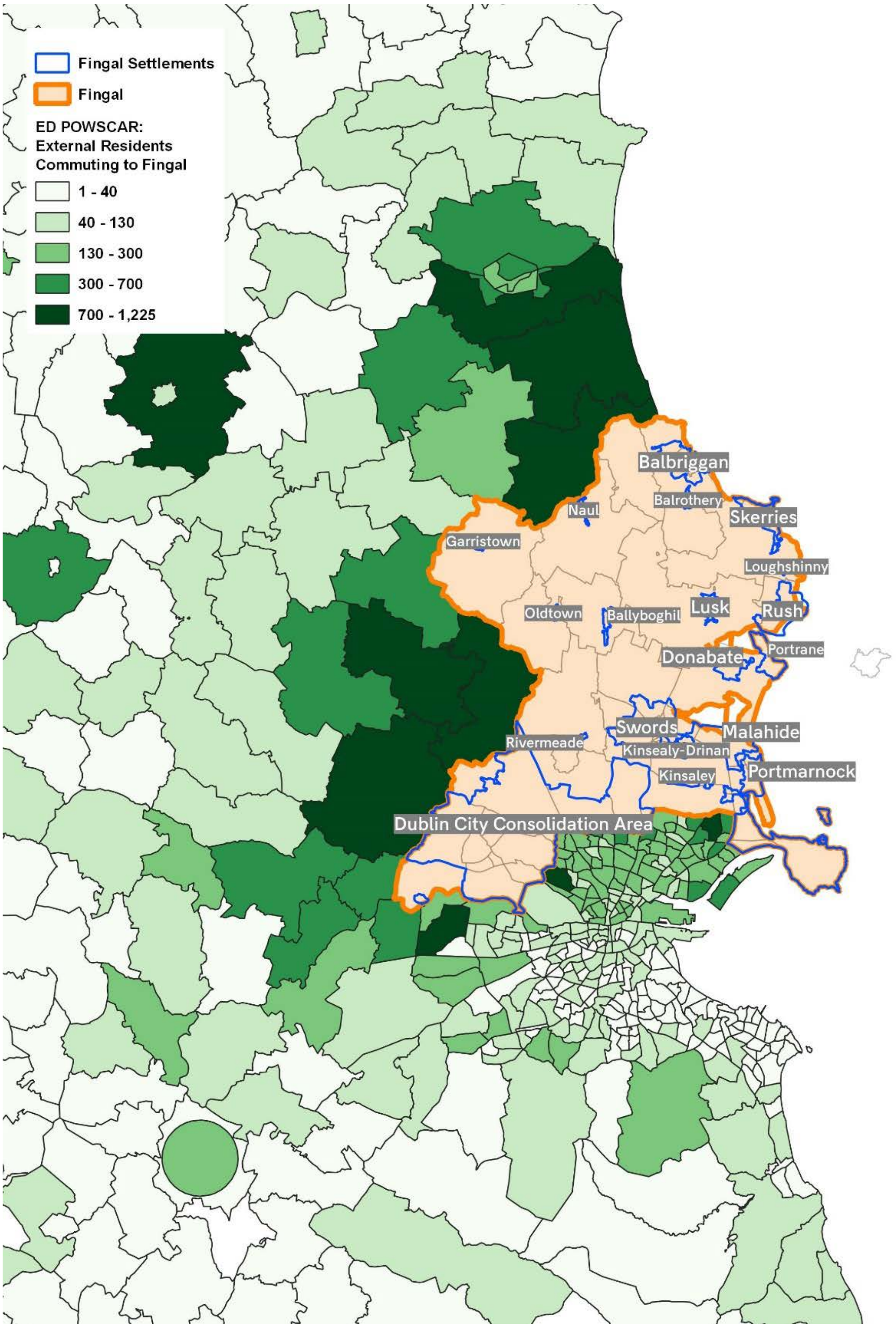


Figure 4-4: External commuters to Fingal by origin (Source: POWSCAR 2016)

4.1.3 Conclusions on Commuting to/from Fingal

In summary, 106,572 persons that live within Fingal also work or attend education within Fingal whilst 76,124 persons leave Fingal. In contrast, 52,332 people commute to Fingal. As a factor of the population within Fingal as recorded by POWSCAR who remain in the area (106,572), external commuters add an additional 52,332 or 49.1% to the workforce and those in education. Overall, there is a net loss of 23,792 people who work/commute outside of Fingal County Council.

Given the dominance of Dublin City Council in the travel trends, further analysis of the relationship indicates that whilst 56,998 of Fingal's residents commute to Dublin City, 22,668 of Dublin City's residents commute to Fingal. This results in a net loss of 34,330 for Fingal and it should be noted that is much lower than South Dublin and Dun Laoghaire-Rathdown combined (a net loss of 3,464 people). By contrast, there is a net gain of 7,851 people from County Meath, 1,702 people from County Louth and 1,409 people from County Kildare.

4.2 Emerging trends

4.2.1 COVID-19

In addition to those trends as described in Section 3.3.1, the most significant impacts of COVID-19 on travel in Fingal are associated with the direct impact on Dublin Airport as well as the influence of travel restrictions on commuting patterns, congestion and public transport use due to the transition to working and education from home for many residents in Fingal.

The latest transport bulletin from the CSO (published in February 2021) uses data to the end of January 2021 from Transport Infrastructure Ireland, the Road Safety Authority, the National Transport Authority, Dublin City Council, the Office of the Revenue Commissioners and the Department of Transport. This provides the national and regional context and it was evident that COVID-19 and associated restrictions have had a significant impact on travel trends specifically traffic volumes, the number of journeys on public transport and travel via Irish airports.

In Dublin during those weeks when restrictions were first introduced and most stringent (i.e. from 29 March to 2 May 2020) the volume of cars on the roads was more than 70% lower than the same period in 2019. Comparable declines were also evident in January 2021 (around 50% lower than the previous year) and all weekly volumes during 2020-21 were lower than the previous year as illustrated in Figure 4-5.

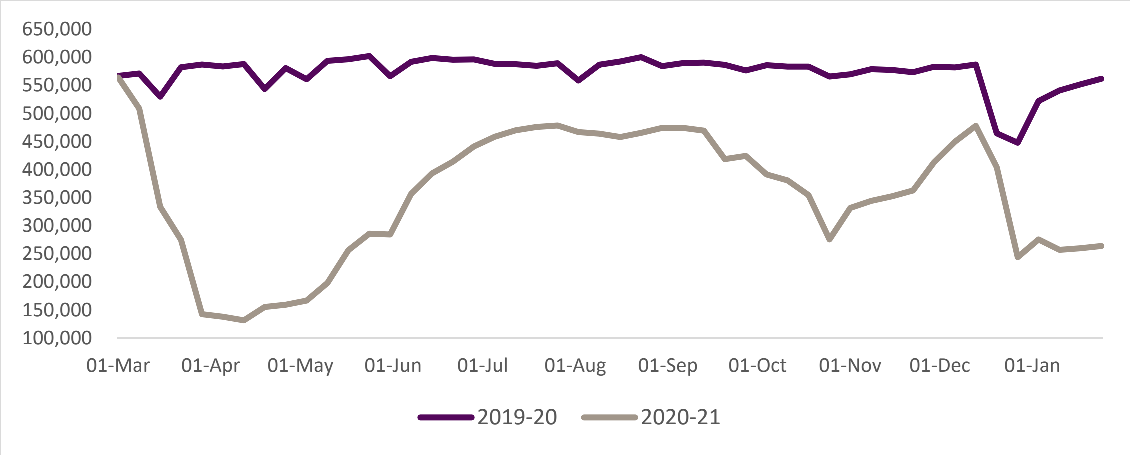


Figure 4-5: Average weekly volume of cars at selected Dublin sites (Source: CSO 2021)

Public transport usage also dropped significantly following the onset of the COVID-19 pandemic, with peaks and troughs as restrictions were implemented and redacted as illustrated in Figure 4-6. Further, it is evident that the Dublin bus network is particularly influential in terms of public transport usage and modal share as it generally comprised between 70 -90% of those journeys illustrated in Figure 4-6.

During the first week of March 2020 there were 3.967 million journeys via bus and rail which declined to approximately 390,000 by the end of that month. This is illustrative of the sudden, significant impact of the COVID-19 pandemic. Whilst passenger journeys did recover somewhat over time, they did not achieve preceding levels as they reached a high of approximately 2 million in the weeks leading up to Christmas. However, this was followed by another period of decline following the implementation of Level 5 restrictions in late December 2020 – January 2021.

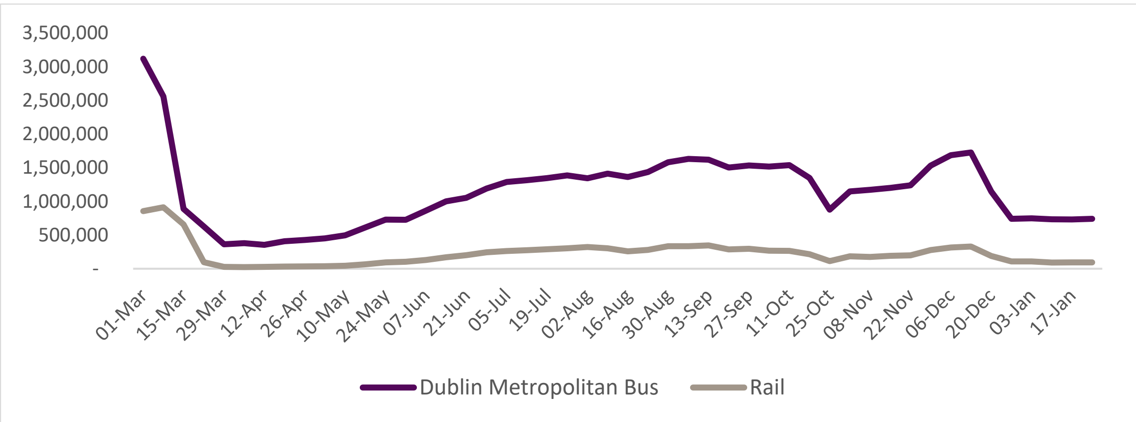
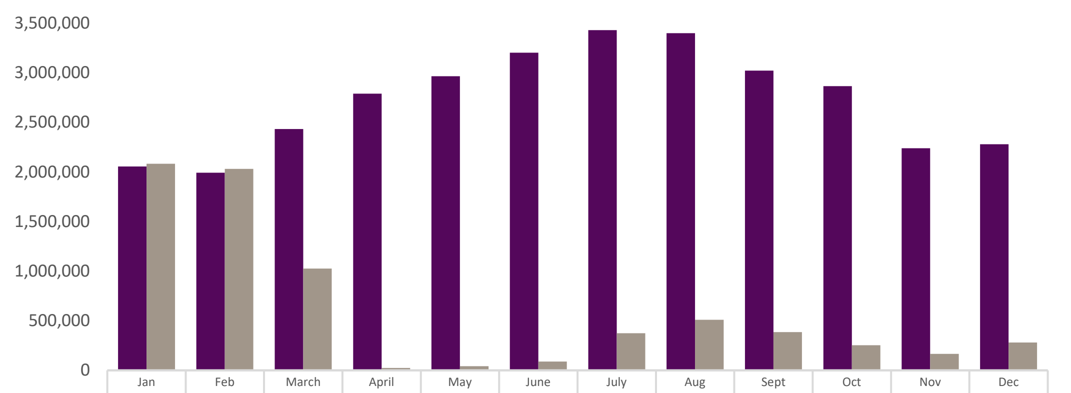


Figure 4-6: Passenger journeys by bus (in the Dublin metropolitan region) and rail (nationally) during March 2020 – January 2021 (Source: NTA)

4 Travel Trends Analysis

Of particular relevance to Fingal is the impact on Dublin Airport where the number of passengers landed declined from 32,676,251 in 2019 to 7,267,303 in 2020. Particularly impactful was April 2020 which saw a year-on-year decline of 99.1% whilst the peak months of June, July and August saw declines of 97.2%, 89.1%, 85% and 87.2% respectively.

More than half of all those who travelled through Dublin Airport in 2020 did so in January and February, as passenger numbers increased by 2% to 4.1 million passengers the first two months of the year. Between March and the end of December, passenger numbers fell by 89% to 3.3 million.



	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
2019	2,054,794	1,993,325	2,432,195	2,789,660	2,965,517	3,202,409	3,430,859	3,399,714	3,021,796	2,865,397	2,240,194	2,280,391
2020	2,082,481	2,030,643	1,026,004	23,951	42,661	88,981	374,443	509,957	386,058	253,972	166,835	281,317

Figure 4-7: Number of passengers[6] handled by Dublin Airport in 2019 and 2020 (Source: CSO)

Overall, the significant impact of COVID-19 on travel trends at the national and regional level has been evident and filtered down to Fingal and indeed it can be assumed to the settlements and rural areas therein. The future of COVID-19, associated travel restrictions and associated impacts and understanding as to how this will affect travel is unclear, but it is clear that all policy should be agile and flexible to respond to COVID-19 or indeed any other future pandemics that may occur and impact on travel trends to a greater or lesser extent.

[6] Passenger numbers refer to commercial passengers only. Transit passengers are included and are counted twice (i.e. both as arriving and departing passengers).

4.2.2 Brexit

Many of those trends as described in Section 3.3.2 are relevant to travel trends particularly in relation to the movement of people and goods. Otherwise, the most significant impacts of Brexit on travel in Fingal are associated with the direct impact on Dublin Airport as well as the influence on the movement of people and goods particularly across the Northern Irish border and for freight.

In Dublin in the week beginning 03 January 2021, HGV volumes were 5.1% lower and for week beginning 24 January, HGV traffic volumes are 15.9% lower than the same periods in 2020. This may be attributable to both the impacts of COVID-19 restrictions as well as Brexit.

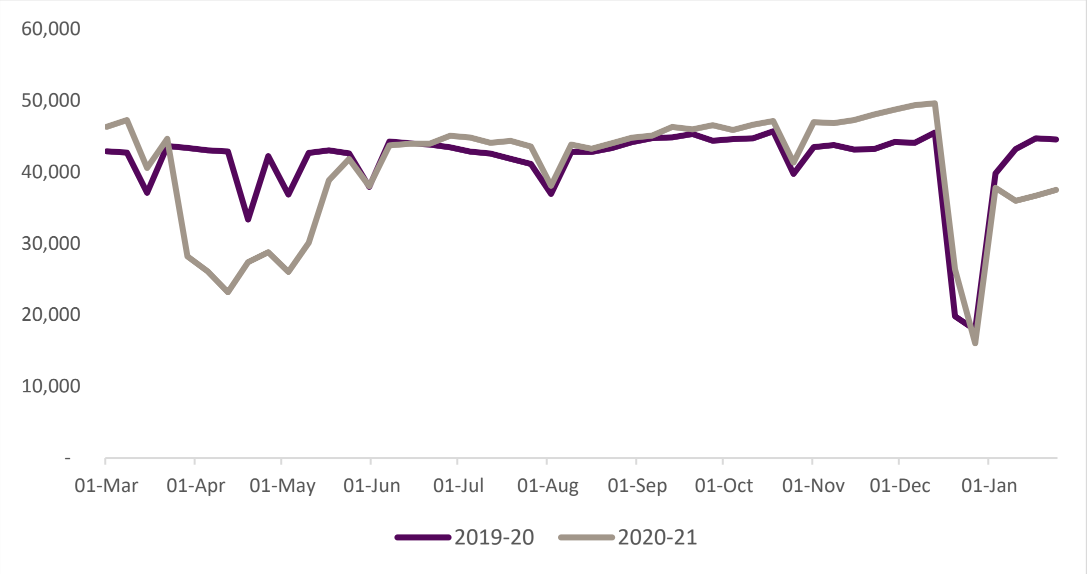


Figure 4-8: Average weekly volume of heavy goods vehicles at selected Dublin sites (Source: CSO 2021)

Passenger numbers declined to 213,000 in January 2021 and just over 106,000 in February 2021 which represents an 90% and 95% year-on-year decline respectively. However, it should be noted that this is attributable to both COVID-19 and Brexit.

It should be noted that the grace period for Brexit freight movements is ongoing until 1 April 2021. The latest Government update (published on 1 March 2021) confirms that during January - February 2021, Irish – British freight volumes were down by around 40% and up on direct Continental services by around 80% nationally compared to the same period in 2020. This is due to a number of factors in addition to the new Brexit related checks and controls, including significant stockpiling that occurred at the end of 2020, greater use of direct routes and the continuing impact of the COVID-19 pandemic.

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The future of Brexit, associated direct and indirect impacts on travel trends as well as the specifics of further agreements is unclear, but it is evident that all policy should be agile and flexible to respond to Brexit such that impacts within Fingal can be minimised in so far as practicable.

4.2.3 Future Infrastructure Development

There are a range of forthcoming local infrastructure interventions as well as Strategic Infrastructure Developments that will impact and influence travel trends within, to and from Fingal over the coming years. These developments will accommodate increasing travel demand, alleviate existing issues and help Fingal transition towards sustainable mobility in accordance with overarching policy. MetroLink, DART+ and BusConnects are the most significant transport infrastructure projects that will deliver step change in travel trends and commuting patterns through the provision of a dedicated automated metro, additional railway and redesigned bus network respectively. Further, the delivery of the metropolitan cycle network along with local interventions such as cycleway improvements (particularly along the coastline), Snugborough and Donabate Bridges along with targeted measures in Balbriggan and Swords town centres along with safer schools' infrastructure will impact across Fingal.

MetroLink is the planned high capacity, high-frequency metro railway line running for 19km both overground and underground that is being progressed by Transport Infrastructure Ireland. It stretches from Swords in the north, toward the Airport, Glasnevin, city centre and onwards to Charlemont in the south of the city. An overview of the route is provided in Figure 4-9 for information. MetroLink will also be served by some Park and Ride destinations including one at Estuary (to the north of Swords). This network will therefore serve Dublin Airport, Irish Rail, DART, Dublin Bus and Luas services and connect key destinations including Ballymun, the Mater Hospital, the Rotunda Hospital, Dublin City University and Trinity College Dublin. MetroLink is anticipated to carry up to 50 million passengers annually and reduce journey times between Swords and the city centre to 25 minutes. It is anticipated that the application for MetroLink will be submitted to An Bord Pleanála in June 2021.

4 Travel Trends Analysis

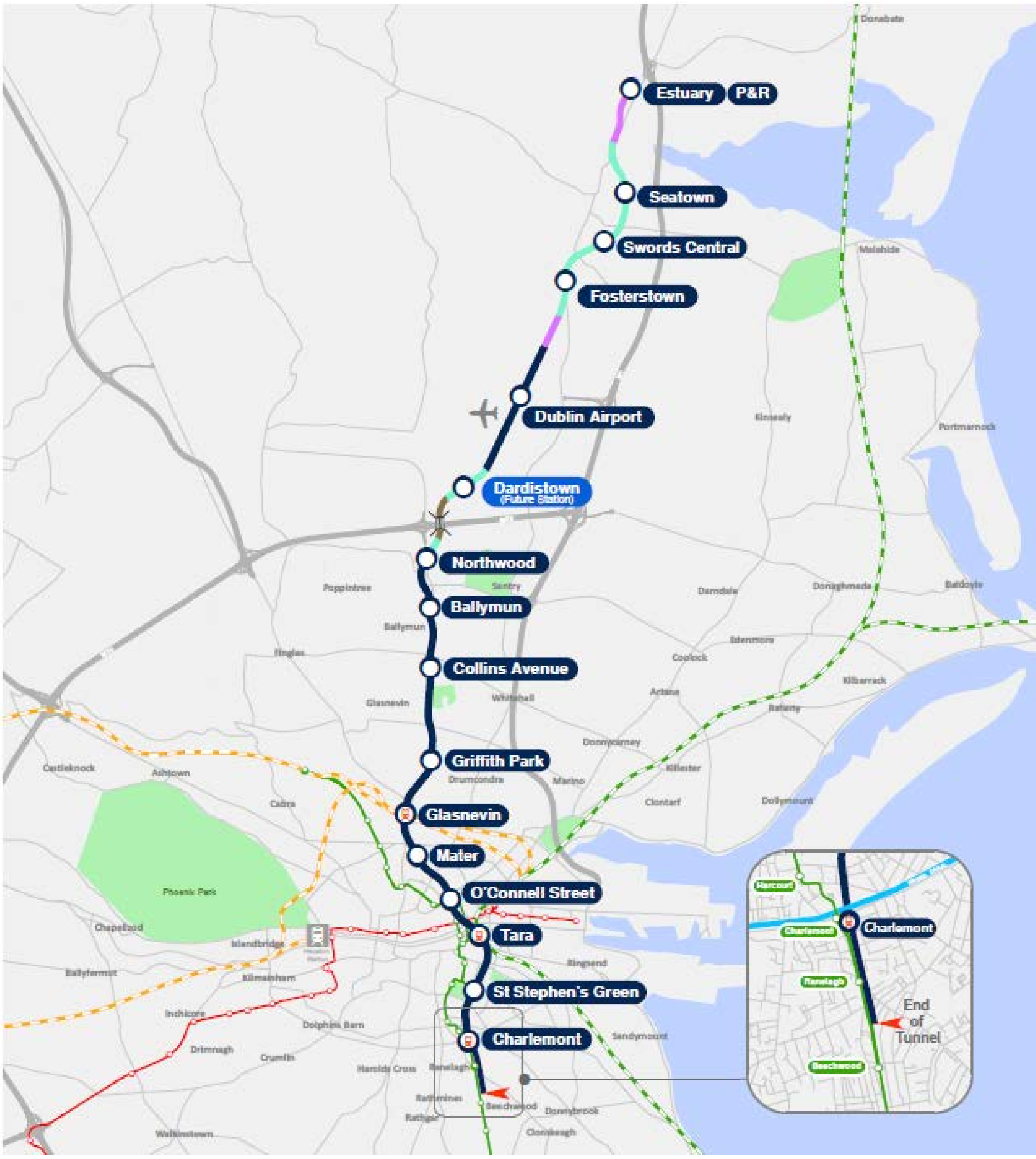


Figure 4-9: Overview of MetroLink (Source: Transport Infrastructure Ireland)

DART+ is a programme of projects being progressed by Irish Rail that aims to modernise and improve existing rail services in the Greater Dublin Area. It will provide a sustainable, electrified, reliable and more frequent rail service, improving capacity on rail corridors serving Dublin. The current DART network will be increased to 150km of railway corridor through the electrification and upgrade of existing lines along with the purchase of new train fleet. Specifically the DART+ Programme will deliver frequent, modern, electrified services to from Dublin City Centre (Connolly and Spencer Dock) to Maynooth and M3 Parkway; Hazelhatch and Celbridge; Drogheda; and Greystones with an overview provided in Figure 4-10. Of particular relevance is the Maynooth Line and M3 Parkway which is scheduled to be applied for in 2021 and the DART Coastal line which is currently scheduled to be applied for in the second half of 2022, both of which would serve communities in west and north Fingal respectively.

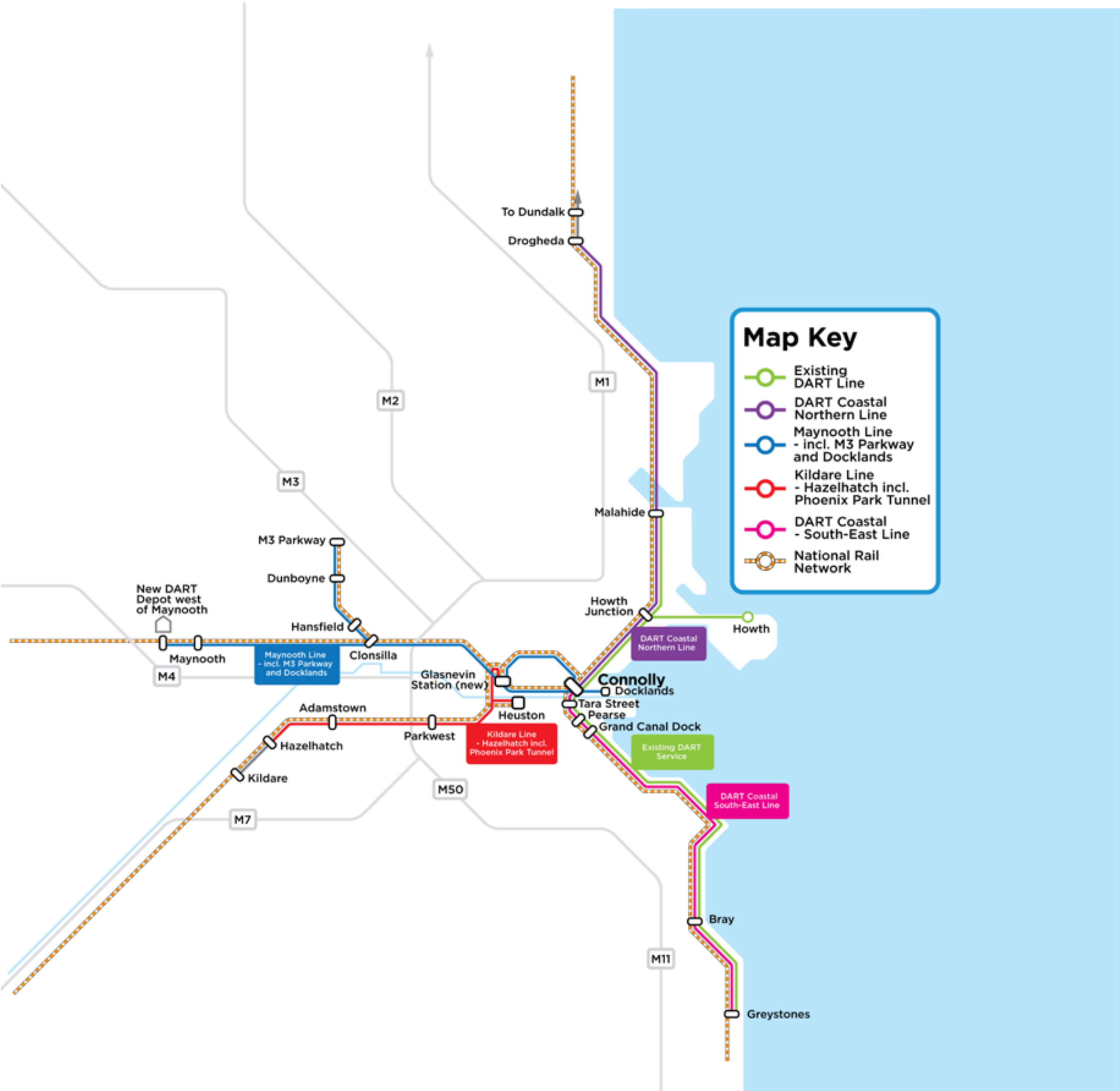


Figure 4-10: Overview of DART+ Programme (Source: Irish Rail)

4 Travel Trends Analysis

BusConnects is the National Transport Authority's programme to greatly improve bus services in Irish cities and within Dublin this comprises the following nine elements:

- A network of next generation bus corridors – over 230km of bus lanes (and 200km of cycle tracks/lanes) to make journeys faster and more reliable;
- A complete redesign of the bus network – to provide a more efficient network with high frequency spines, new orbital routes and increased bus services;
- State-of-the-art ticketing system – to provide a simpler, more modern, more convenient and more integrated ticketing system;
- Transition to a cashless payment system – to streamline and speed up the process of paying for bus journeys;
- A simpler fare structure – to make movement between different bus services and between buses and other transport modes, seamless and easy, without financial penalty;
- Park & Ride facilities - to enable those travelling longer distances to make part of the journey by car, then leave the car in a dedicated car park and complete the journey by bus;
- New bus livery – providing a common style across different operators that conveys the image of a modern, effective transit system;
- New bus stops and shelters – with better route and fare information provided in each case and with timetable information specific to each stop; and
- Low emission vehicles – to contribute to Ireland's climate change targets by transitioning to a lower emission bus fleet.

A number of spine routes (i.e. most frequent, high capacity routes) will serve Fingal and connect to a number of orbitals (i.e. routes that operate around the city), other city bound (or radial) routes, local routes as well as peak and express routes as per Figure 4-11. Specifically, in Fingal the A spine will connect with Swords, Blanchardstown will be connected via the B spine whilst the H spine will connect to Sutton, Howth and Portmarnock. It is anticipated that the application for BusConnects will be submitted to An Bord Pleanála in 2021 and it will be implemented on a phased basis across Dublin.

4 Travel Trends Analysis

Figure 4-11: Overview of BusConnects (Source: National Transport Authority)

There are also a range of local interventions across the various settlements and rural areas in Fingal that will impact on travel trends, commuting, movement and connectivity over the coming years. The future development of high density residential and commercial areas across Fingal will also impact on travel within and across Fingal along with local targeted infrastructure and mobility measures.

For instance, in February 2020 Fingal became the first local authority in Ireland to launch a 'Mobility Hub' to support accessible and sustainable travel. The hub on Main Street, Blanchardstown comprised five parking bays with specific colour-coordinated functions including age-friendly, disabled, electric vehicle charging, bike rack (bike share and public) and car sharing. The aim is to encourage varied and sustainable types of transport in areas that are close to existing public transport links with high concentration of employment, housing, shopping, amenities and recreation.

Additionally, New Street in Malahide was pedestrianised during the summer of 2020 as part of a trial to help businesses continue trading, increase footfall and facilitate social distancing in the town centre. The New Street Pedestrian Zone was implemented as part of the Walk Bike Fingal initiative which aims to encourage and facilitate social distancing for citizens going about their daily business.

It should also be noted that the design and planning for the extension of the Royal Canal Greenway into west Fingal is ongoing. This pedestrian and cycle route would extend from the boundary with Kildare County Council (i.e. the existing 130km route between Maynooth and Clondra in Longford) towards the Old Navan Road and into Castleknock towards the north city. This would complete the Dublin section of this national coast-to-coast cycle route.

At a more strategic level, the Department of Housing, Local Government and Heritage has awarded funding under the Urban Regeneration and Development Fund for:

- Sustainable Swords received funding in November 2018 to produce a place-making strategy focused on the strategic regeneration and compact development of Swords, in order to increase resilience of the local economy and to provide for an enhanced, accessible, inclusive, child-friendly and healthy urban environment. Work is ongoing with further recommendations expected in 2022 with targeted action to be implemented thereafter.
- Our Balbriggan Rejuvenation Plan received €24.5million funding in March 2021 to help realise eight projects therein and support public realm improvements. The projects are Quay Street, Harbour, 2/4 Dublin Street, Bridge Street, Railway Street, Millpond Park, Promenade and Coastal Improvements along with the Castle to Castle Cycleway and the delivery will be phased with the first three projects scheduled for completion by 2023 and Bremore Regional Park, the Fingal Coastal Way and Bridge Street is expected to be finished by 2026. Thereafter the rejuvenation of Railway Street and Millpond Park is scheduled to be completed by 2027.

Separately, Fingal County Council has also been awarded funding from the Department of Rural and Community Development for projects including:

- €190,000 awarded under the 2020 Town and Village Renewal Scheme to support projects in St. Margaret's, Balrothery, Rolestown and Lusk. €21,600 is allocated to upgrade Broadband Connection Points to facilitate remote working and digital access for the local population in Rolestown and Lusk (Man O War). €99,000 for Balrothery will allow for the development of new walking and cycling facilities, together with enhanced streetscape measures whilst St. Margaret's will benefit from €69,525 to improve the local area with the development of a new green area with improvements to heritage assets and access in the village.
- €68,375 allocated in July 2020 under the Community Enhancement Programme towards enhancing the facilities available to communities at a smaller scale including projects which range from purchasing lawnmowers and IT equipment to minor renovations to buildings.

4 Travel Trends Analysis

Fingal County Council will receive almost €15million funding from the National Transport Authority to support walking and cycling infrastructure. This funding will help progress 23 projects across the county including the following:

- Donabate Estuary Walking and cycling route, Broadmeadow way: €750,000
- S2S Extension Sutton to Malahide: €310,000
- Royal Canal Cycle Route - entire Fingal route: €400,000
- Harry Reynolds Road Cycle Track: €1,600,000
- Snugborough Road N3 Overbridge (Part-Funded): €2,000,000
- Swords Cycle Network: €100,000
- Schools Streets Fingal Pilots: €150,000
- Donabate Bridge: €400,000
- Bicycle Parking (COVID): €125,000
- Safe to Schools Programme – infrastructure: €100,000
- 2020 Stimulus Programme - Contractual Liability: €4,000,000
- Churchfield Road: €2,000,000
- Snugborough Road - National Aquatic Centre to Ongar: €100,000
- Baldoyle to Howth: €1,000,000
- Dublin Road to Dublin Street Baldoyle: €1,000,000
- Donabate Hearse Road/Main Street/Portrane Road (Link 1 & Link 2): €100,000
- Damastown to Clonsilla Cycle Route including N3 bridge: €150,000
- Clonee to Blanchardstown Shopping Centre: €100,000
- Swords Estuary to Rathbeale Road: €100,000
- Malahide (Main Street) to Swords (Brackenstown Road): €100,000
- Forest Road to Swords Main Street: €100,000
- Bus Related infrastructure (interchange, Little Pace Road): €85,000
- R132 Design (junctions): €100,000

Employment hubs are also relevant to travel trends including the Dublin Enterprise Zone which is a significant national asset that leverages of economies of scale. It comprises designated lands north of Blanchardstown (between the

N2, N3 and M50) whilst the undeveloped lands for heavy industry are located to the east of the Dublin Enterprise Zone (at the N2 and M50 intersection). High technology zoned lands are split into two primary sectors; the majority are located within Rosemount Business Park, IDA Ballycoolin Business Park and Blanchardstown Corporate Park with the remaining lands further west in Damastown Industrial Park. Sites in Damastown and the western portion is zoned for high technology are earmarked for data centre development including the Amazon data centre which is under construction presently.

Additionally, there is investment in utilities infrastructure of relevance specifically projects by Irish Water including the Greater Dublin Drainage Scheme, the Blanchardstown Regional Drainage Scheme and capacity upgrades to various plant across Fingal. The former is expected to be operational by 2026 and it comprises new regional wastewater treatment facility in Clonshaugh, an underground orbital sewer from Blanchardstown to Clonshaugh, a new pumping station at Abbotsown, a partial diversion of the north fringe sewer, and an outfall pipeline to return the treated water to the Irish Sea along with a regional sludge treatment centre and an associated biosolids storage facility at Newtown near Kilshane Cross. Construction of the ~~Blanchardstown~~ Blanchardstown Regional Drainage Scheme is due for completion in early 2023.

Overall, there is therefore a range of infrastructure and strategic development forthcoming that will impact and influence future travel trends across and within Fingal. It is anticipated that all policy and strategic development will support and integrate sustainable mobility. Transport and infrastructure interventions are expected to facilitate the modal shift in alignment with the policy hierarchy and national, regional and local objectives such that they encourage sustainable ways of improving Fingal's integration, connectivity and the movement of residents.

5 Settlement Specific Profiles within Fingal

5 Settlement Specific Profiles within Fingal

This chapter describes the socio-economic profile and travel trends per settlement (as set out in Table 2-1). This has been determined through analysis of a series of indicators with reflections between settlements as appropriate to understand and compare within Fingal.

Specifically, each settlement profile has been developed to illustrate the settlement boundary, population, deprivation and affluence along with a range of social, economic and travel indicators. An overview of the Geodirectory data from the final quarter of 2020 has been analysed to understand commercial properties within and adjacent to each settlement.

5.1.1 - Dublin City Consolidation Area

Population Overview

The Dublin City Consolidation Area has been based on a best fit approach as previously described and all information herein relates to that area.

Consolidation West

The western area incorporating Blanchardstown, Castleknock and Mulhuddart had a population of 108,000 in 2016 accounting for 75% of the settlement. There were 34,000 households in the area.

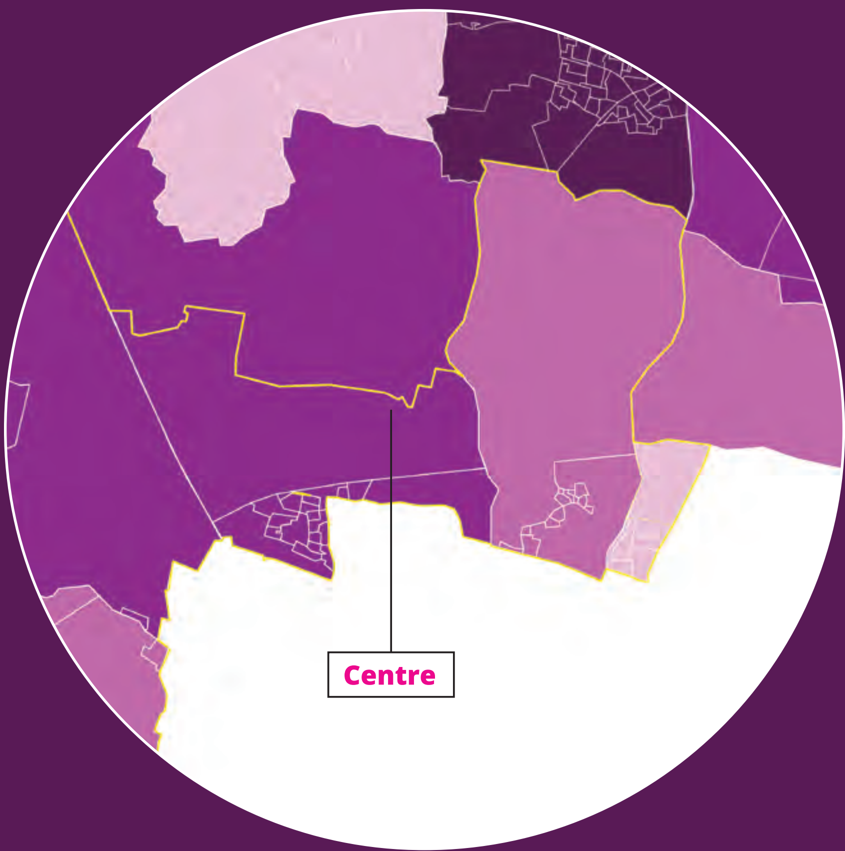
Dublin City Consolidation Area

Population

- 700 - 2,700
- 6,200 - 11,300
- 2,700 - 6,200
- 11,300 - 19,000
- 19,000 - 39,000

Consolidation Centre

The central area incorporating Turnapin and Dublin Airport had a population of 13,800 in 2016 accounting for just 10% of the settlement population. There were 4,400 households in the area. A majority of population are concentrated toward the west beyond Dublin Airport and in Swords to the North.



Dublin City Consolidation Area

Population

- 700 - 2,700
- 6,200 - 11,300
- 2,700 - 6,200
- 11,300 - 19,000
- 19,000 - 39,000

5.1.1 - Dublin City Consolidation Area

Consolidation East

The eastern area including Baldoyle, Sutton and Howth had an estimated population of 23,000 in 2016, accounting for 16% of the settlement. The population is primarily distributed in the Baldoyle-Stapolin and Howth areas. There were 8,400 households in the area.

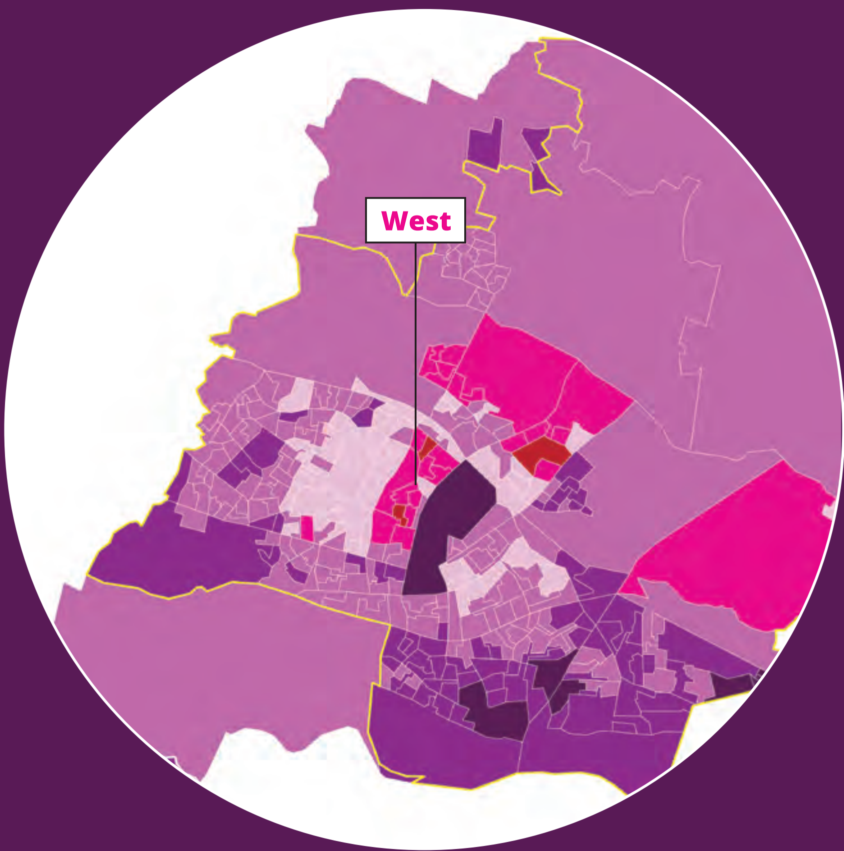
Dublin City Consolidation Area

Population

700 - 2,700
6,200 - 11,300
2,700 - 6,200
11,300 - 19,000
19,000 - 39,000

Consolidation West

There are inequalities evident in terms of deprivation and affluence across Small Areas as illustrated. Pockets of disadvantage are present in the north of Blanchardstown, at Corduff and Blakestown. In contrast, pockets of affluence are noted in Coolmine and to the south at Castleknock.



Dublin City Consolidation Area

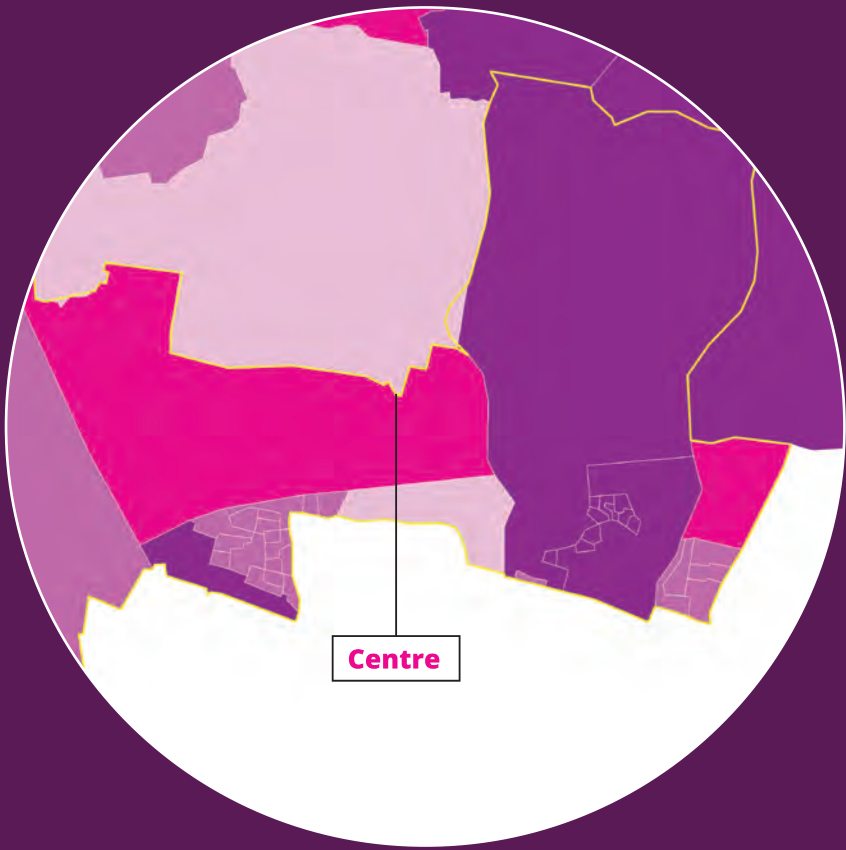
Pobal Index

Very Affluent
Affluent
Marginally above average
Marginally below average
Disadvantaged
Very disadvantaged

5.1.1 - Dublin City Consolidation Area

Consolidation Centre

The Small Areas in the centre of the consolidation area are relatively less populated than the east and west. Pockets of disadvantage are present in Dubber and Turnapin. In contrast, pockets of affluence are noted around Dublin Airport and Charlestown.



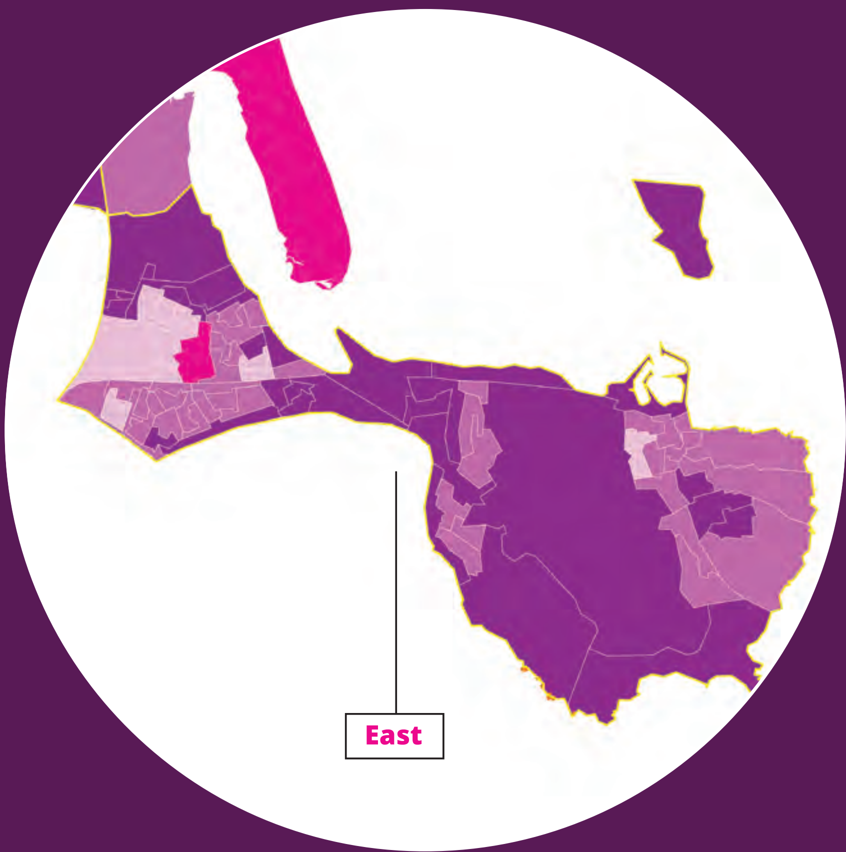
Dublin City Consolidation Area

Pobal Index

- Very Affluent
- Affluent
- Marginally above average
- Marginally below average
- Disadvantaged
- Very disadvantaged

Consolidation East

There is a minor trend of affluence toward the east of the Small Areas in Sutton and Howth. Areas of disadvantage are present in central Baldoyle. In contrast, pockets of affluence are noted around Stapolin, Howth and Sutton.



Dublin City Consolidation Area

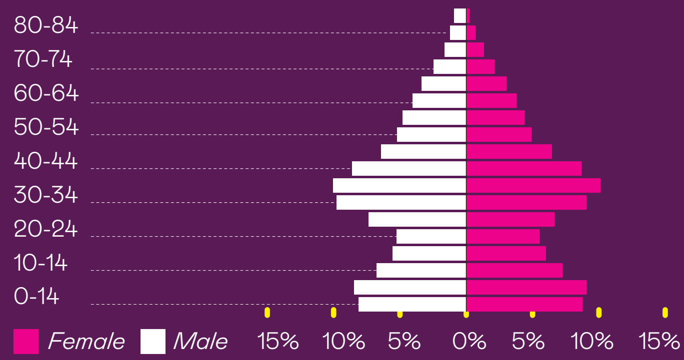
Pobal Index

- Very Affluent
- Affluent
- Marginally above average
- Marginally below average
- Disadvantaged
- Very disadvantaged

Social

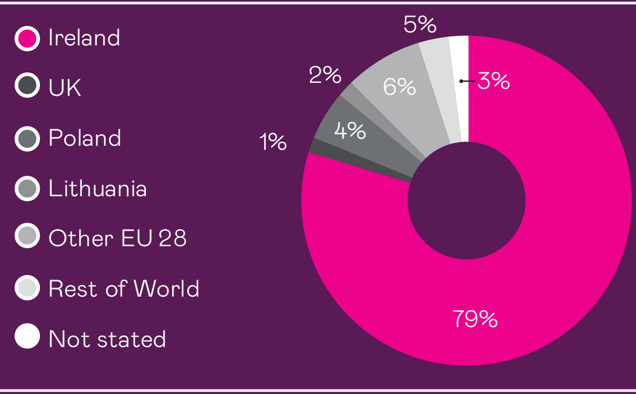
Age profile

The age profile shows that 24.4% are under 15 years while 8.7% are over the age of 65. This results in an average age of 33.3 years with slight variance between male and females (average age of 34 and 32.7 years respectively).



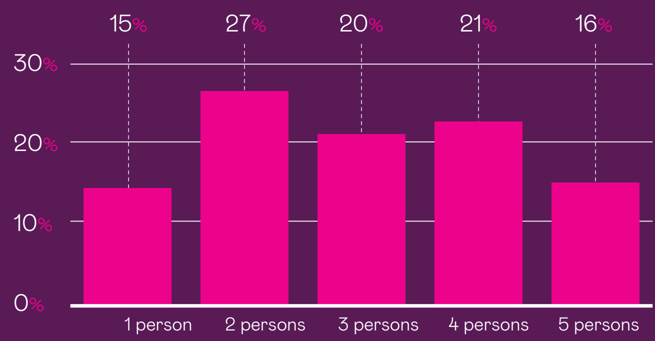
Nationality

Diversity is evident as 26.9% were born overseas whilst 21.2% identified as non-Irish nationals. The most common other nationalities Polish (4.5%), Lithuanian (1.8%) and British (1.2%).



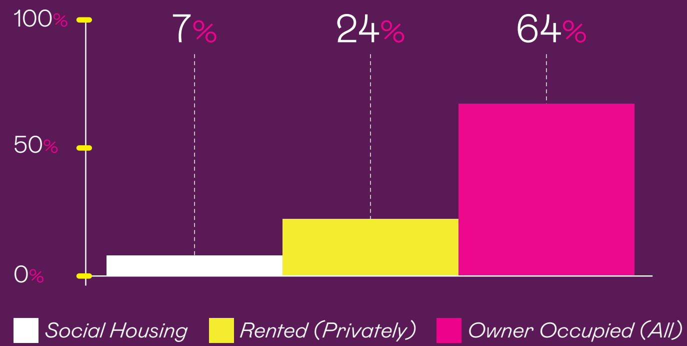
Household structure

The average household size is 3.05 and two person households are the most common, followed by four person households. There are also slightly more households of at least person persons that one person households.



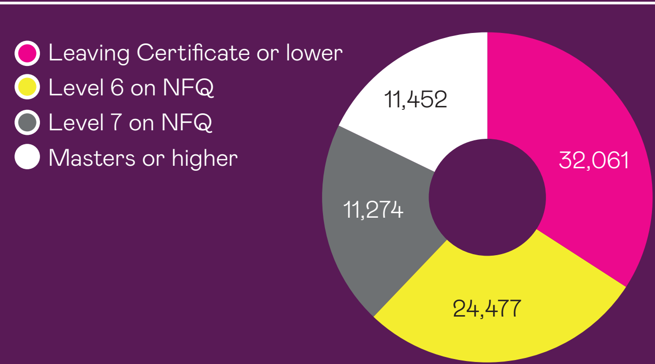
Tenure

Owner occupied is the main tenure type (63.7%), albeit is relatively lower than other settlements. 24.1% is private rental and 7.6% is social housing, of which 6.1% are rented from the local authority.

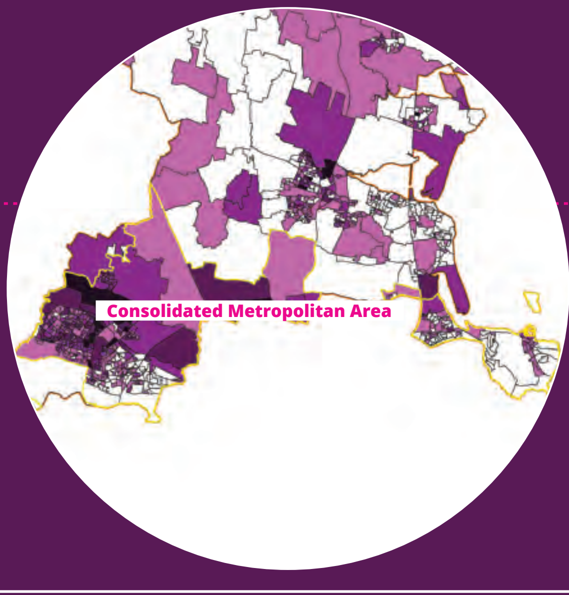


Education

Educational attainment is moderate as 13.33% attained postgraduate education with a further 13.1% educated to higher undergraduate degree. 28.5% were educated to Level 6 whilst 37.3% were educated to Leaving certificate or less.



Economic and Travel



Employment

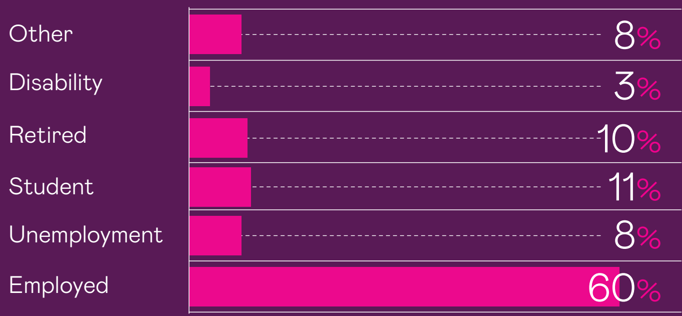
Dublin City Consolidation Area

Employment

0.5% - 4.2%
7.1% - 10.7%
4.2% - 7.1%
10.7% - 15.7%
15.7% - 24.8%

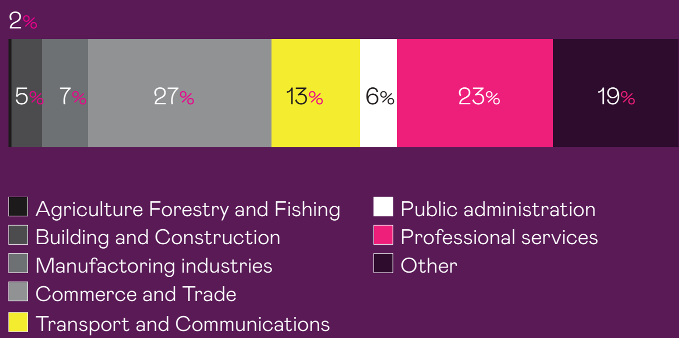
Principal economic status

Employment is 60%, however differences were evident by gender (65.8% males and 54.6% females). 7.8% were unemployed (8.2% males and 7.4% females) and interestingly there is a slightly higher proportion of male students and females retirees.



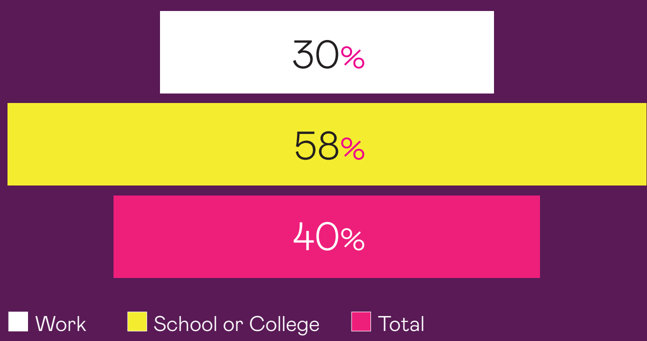
Industry of employment

Commerce and Trade is the main industry (27.3%), followed by Professional Services (23.2%) and then Transport and Communication (13.3%). The smallest industry is Agriculture, Forestry and Fishing, being (0.2%) which is significantly lower than other settlements.



Means of travel to work and education

The most frequent mode of transport is by car (50%), however it is more common for employees (58%) than students (36%). Active transport is used by 18.6% and public transport is used by 20.8% overall,. However a third of students travel on foot whilst bus, coach and minibus is the most common type of public transport (16.2%).

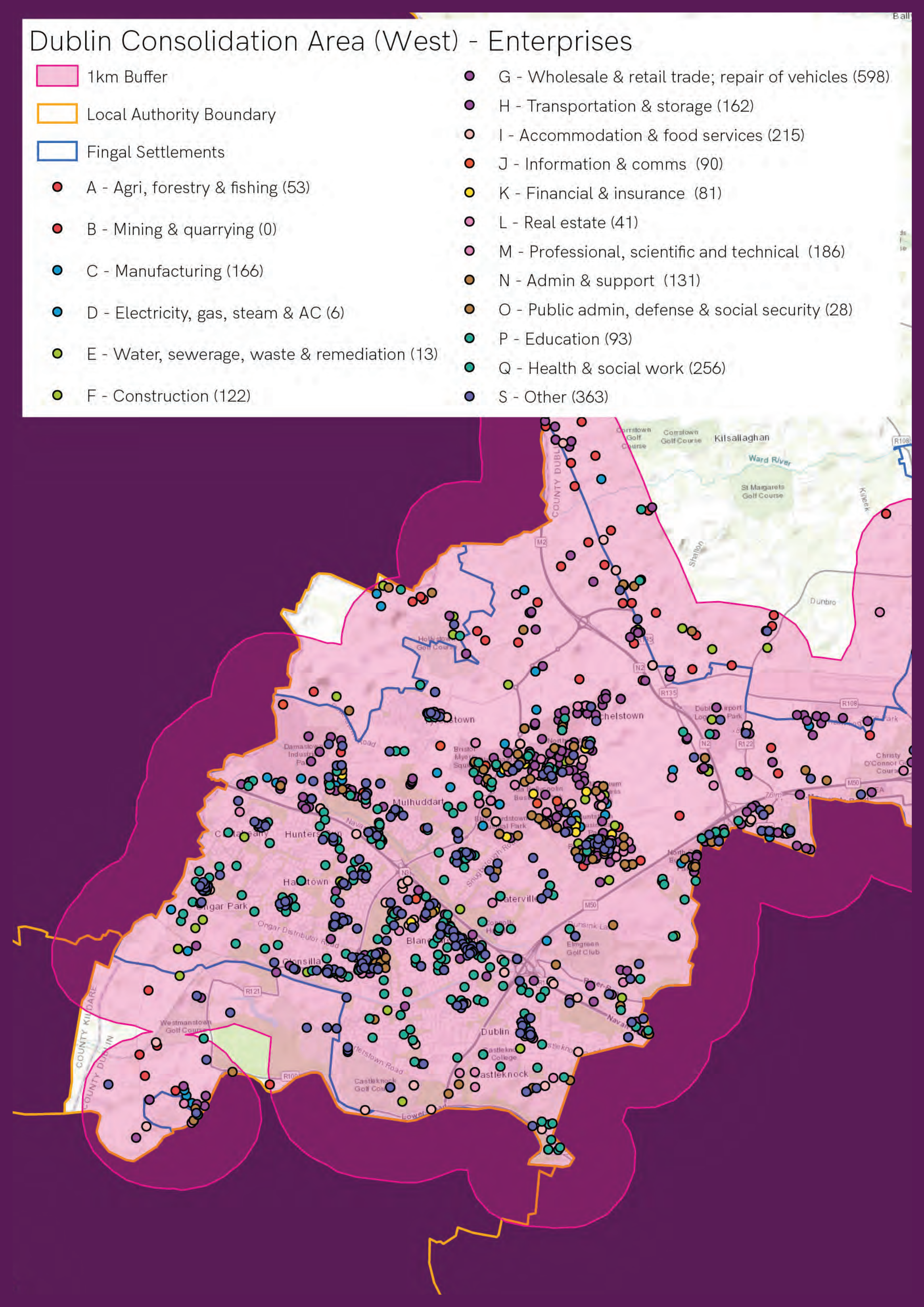


Commuting via active or public transport

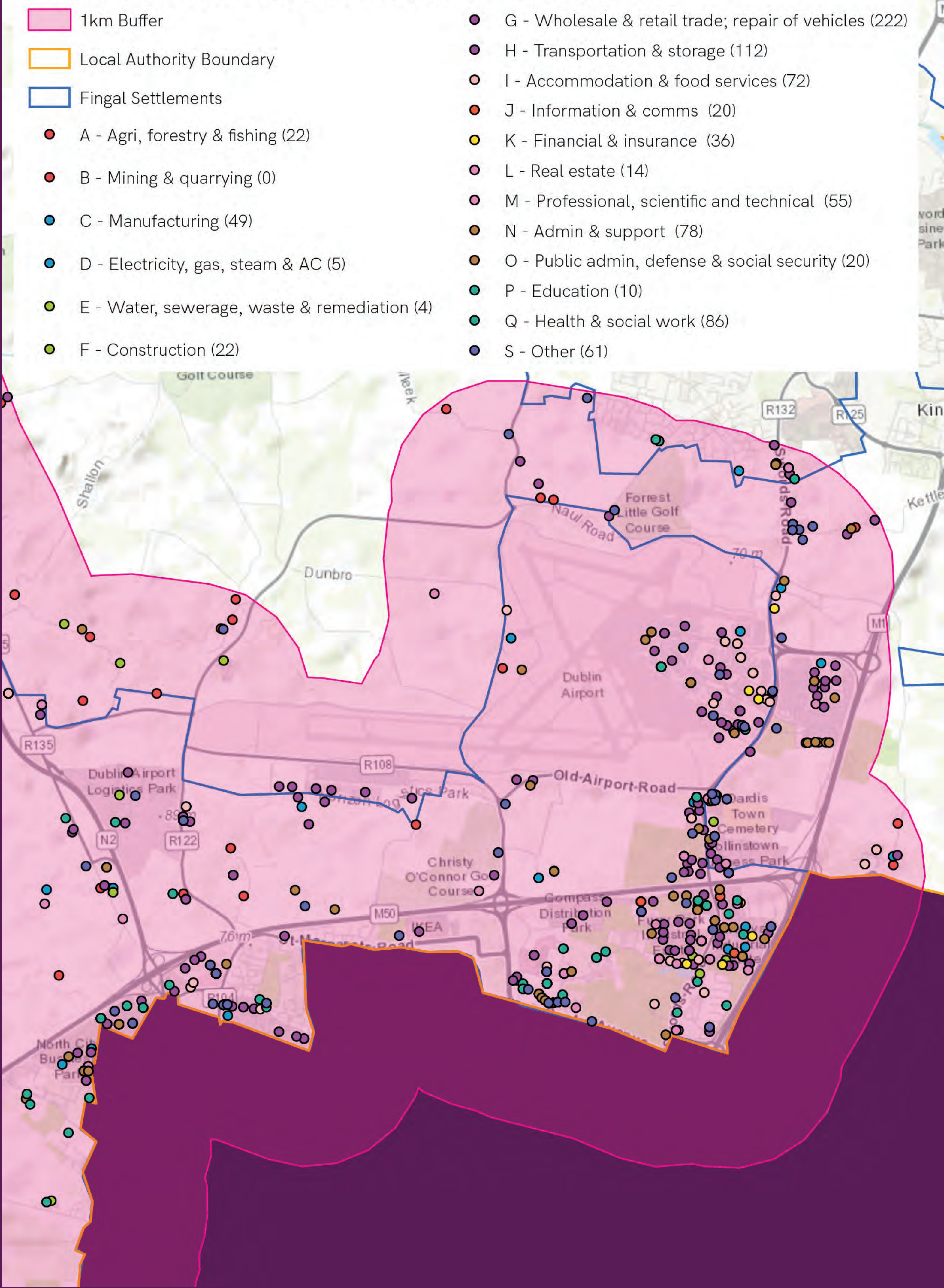
Commercial properties

There are 3,560 businesses (or enterprises as they are know on Geodirectory) therein accounting for 50.5% of NACE coded businesses in Fingal. There are a further 342 businesses within 1km of the settlement boundary.

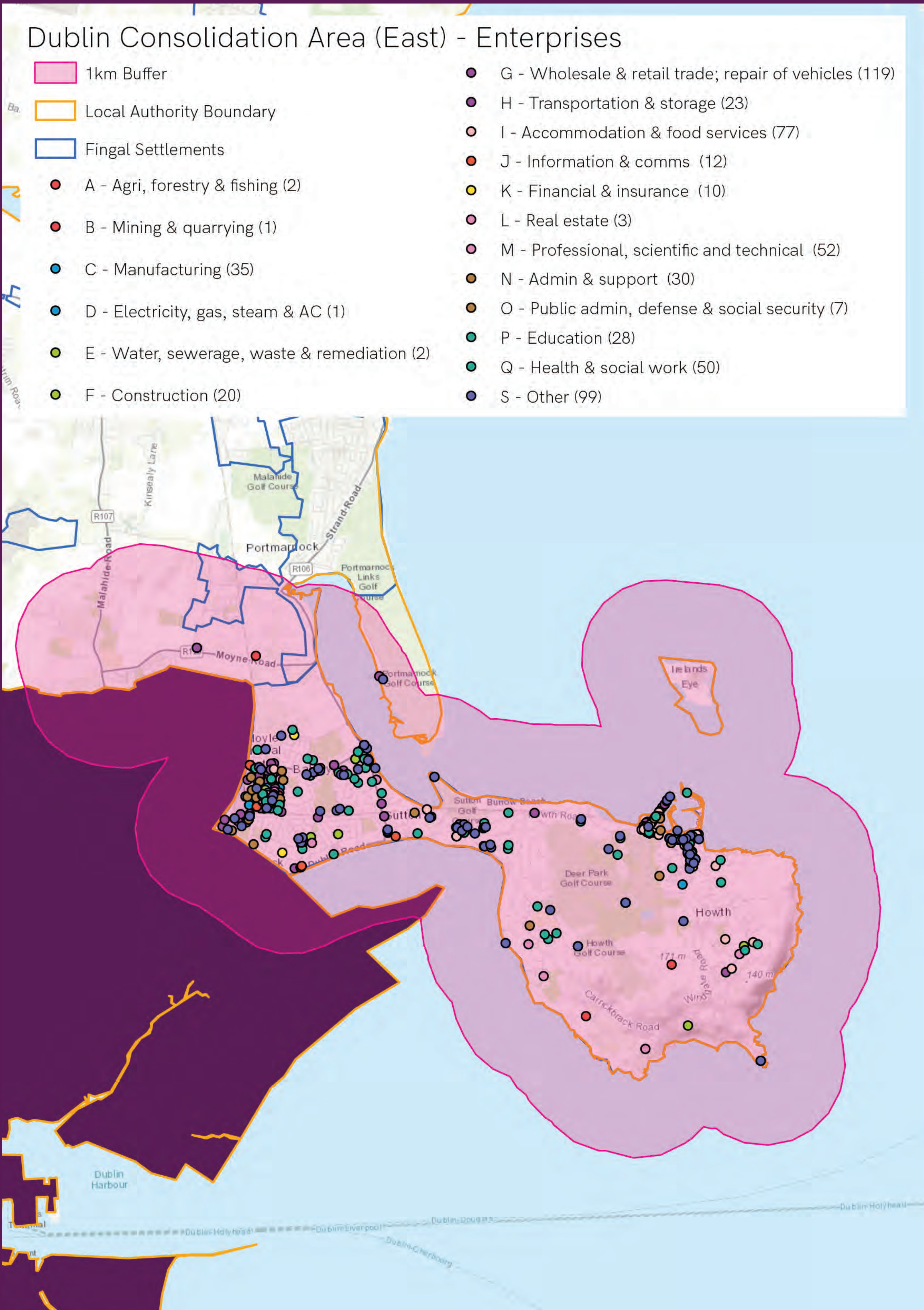
Refer overleaf


Dublin Consolidation Area (West) - Enterprises
1km Buffer
Local Authority Boundary
Fingal Settlements
A - Agri, forestry & fishing (53)
B - Mining & quarrying (0)
C - Manufacturing (166)
D - Electricity, gas, steam & AC (6)
E - Water, sewerage, waste & remediation (13)
F - Construction (122)
G - Wholesale & retail trade; repair of vehicles (598)
H - Transportation & storage (162)
I - Accommodation & food services (215)
J - Information & comms (90)
K - Financial & insurance (81)
L - Real estate (41)
M - Professional, scientific and technical (186)
N - Admin & support (131)
O - Public admin, defense & social security (28)
P - Education (93)
Q - Health & social work (256)
S - Other (363)
Kilsallaghan
Ward River
St Margarets Golf Course
Corrstown Golf Course
Dunbro
Mulhuddart
Hunterstown
Hartstown
Ongar Park
Clonsilla
Blanchardstown
Dublin
Castleknock
Westmanstown Golf Course
Elmgreen Golf Club
COUNTY DUBLIN
COUNTY KILDARE

Dublin Consolidation Area (Centre) - Enterprises



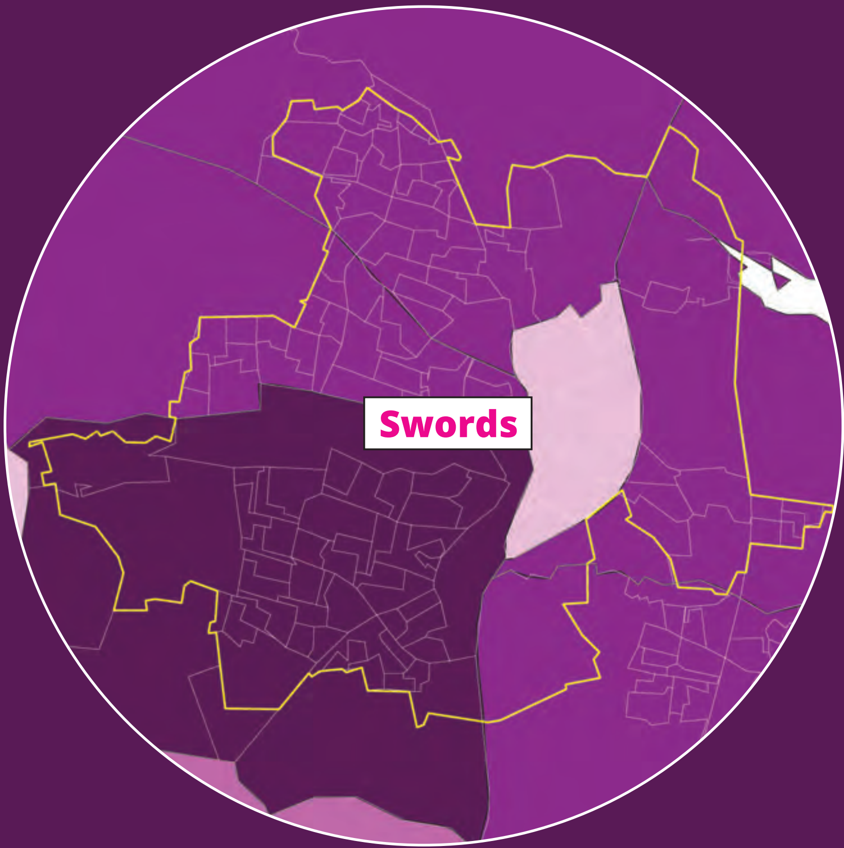
Dublin Consolidation Area (East) - Enterprises



5.1.2 - Swords

Overview of Swords

Swords had a population of 39,248 in 2016 which was the highest of all settlements within Fingal and indeed the second largest town in the State. This represented 6.3% growth from 2011 and comprised 10,385 families and 12,896 total households.



Swords Settlement

Population

700 - 2,700

6,200 - 11,300

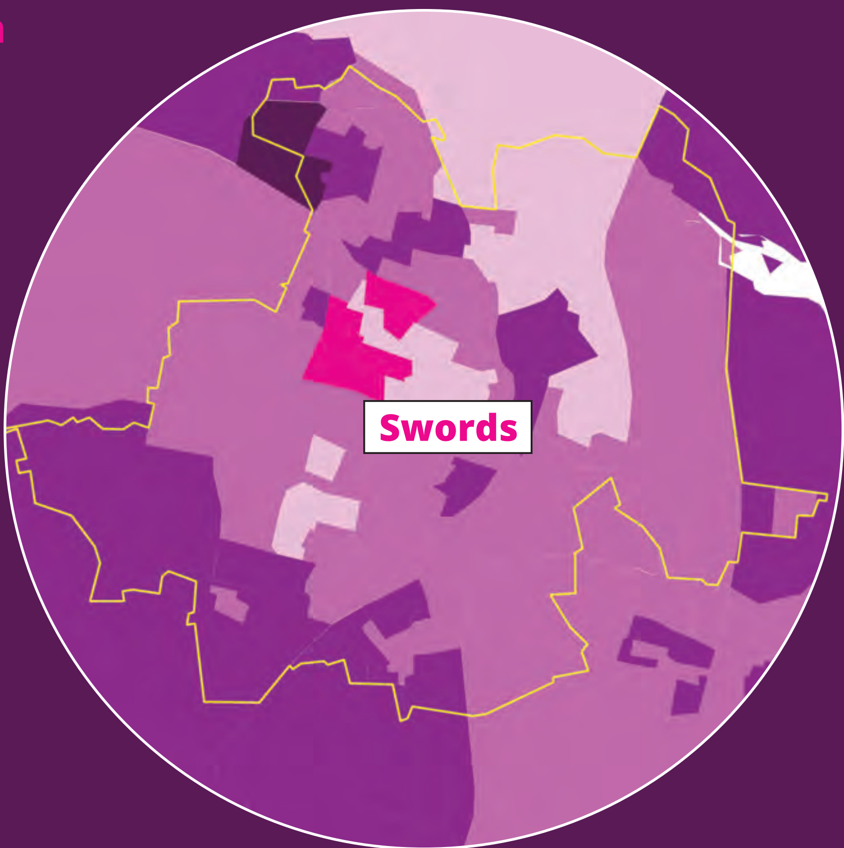
2,700 - 6,200

11,300 - 19,000

19,000 - 39,000

Affluence and **Deprivation**

There are inequalities in terms of deprivation and affluence within the settlement as illustrated Generally disadvantage was evident towards the centre and west whilst affluence was present in pockets.



Swords Settlement

Pobal Index

Very Affluent

Affluent

Marginally above average

Marginally below average

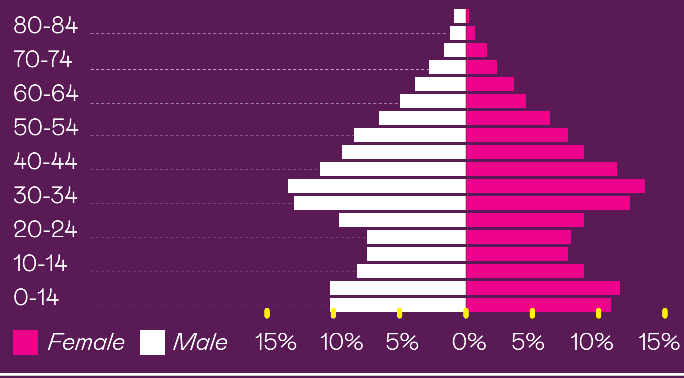
Disadvantaged

Very disadvantaged

Social

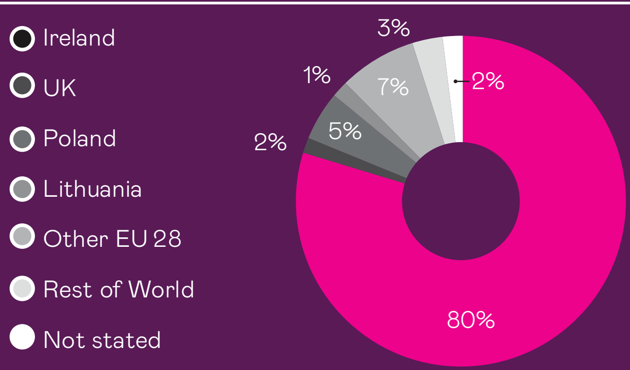
Age profile

The young population (23.2% below 14 years and just 7.2% 65 years and above) is evident in the age profile. There is little difference between genders and this is reflective of an average age of 33.3 years.



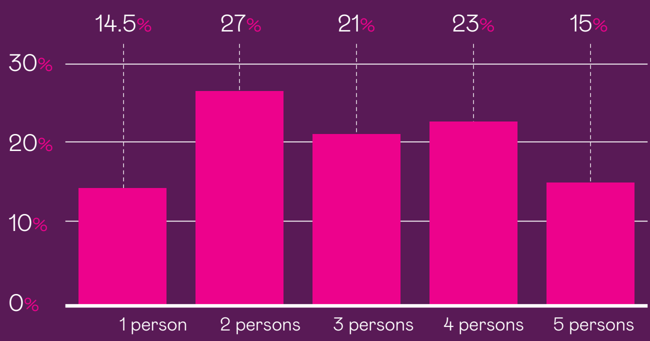
Nationality

Diversity is evident in swords as 20.1% of the population are not Irish nationals, of which Polish (5.4%), other EU countries (7.2%) were the most common. 24% of the population also were born overseas.



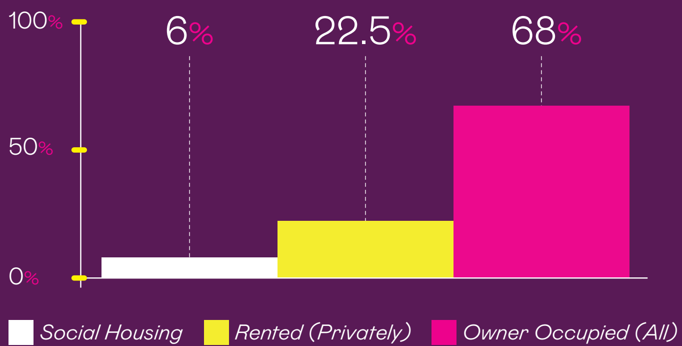
Household structure

In terms of families, 71.31% of households comprised married and/or children whilst just 14.55% were single person households. This resulted in an average household size of 3.03 as illustrated by the proportional split.



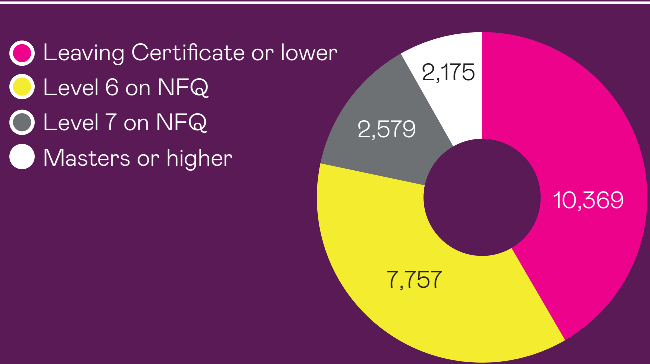
Tenure

Owner occupation was the dominant household tenure type, followed by private rental and then social housing of which 5.5% was attributable to rental from the local authority.



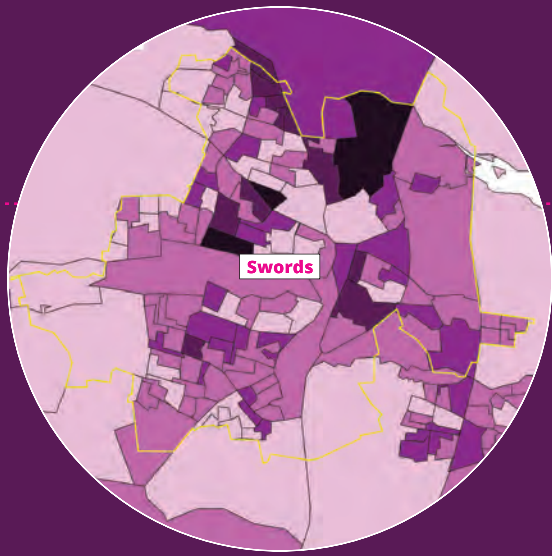
Education

Educational attainment is high with almost 9% having attained postgraduate education with a further 10.5% education to higher undergraduate degree.



Economic
and Travel

Employment



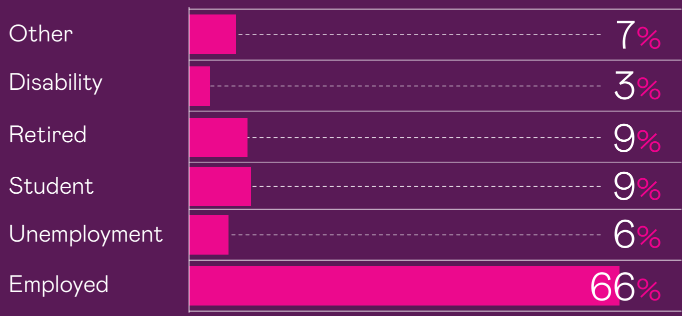
Swords Settlement

Employment

0.5% - 4.2%
7.1% - 10.7%
4.2% - 7.1%
10.7% - 15.7%
15.7% - 24.8%

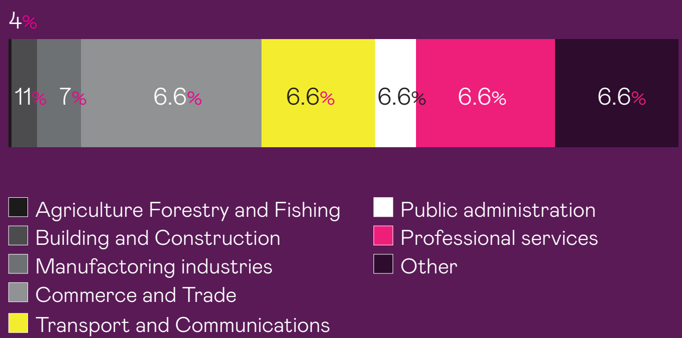
Principal economic status

Economic activity was high with almost two thirds in employment and a further 9.3% studying and of those unemployed 0.7% were looking for their first job.



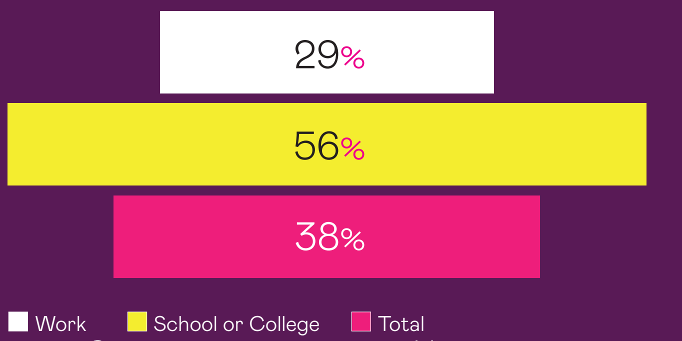
Industry of employment

Commerce and trade was the most dominant industry (26.8%) followed by public administration (20.8%), other (18.6%) and transport and communications (17%).



Means of travel
to work and education

Car was the dominant mode of transport for those commuting to work or education (54%) whilst almost 38% used active or public transport. However differences were evident between employees and students with employees mostly using cars to commute.

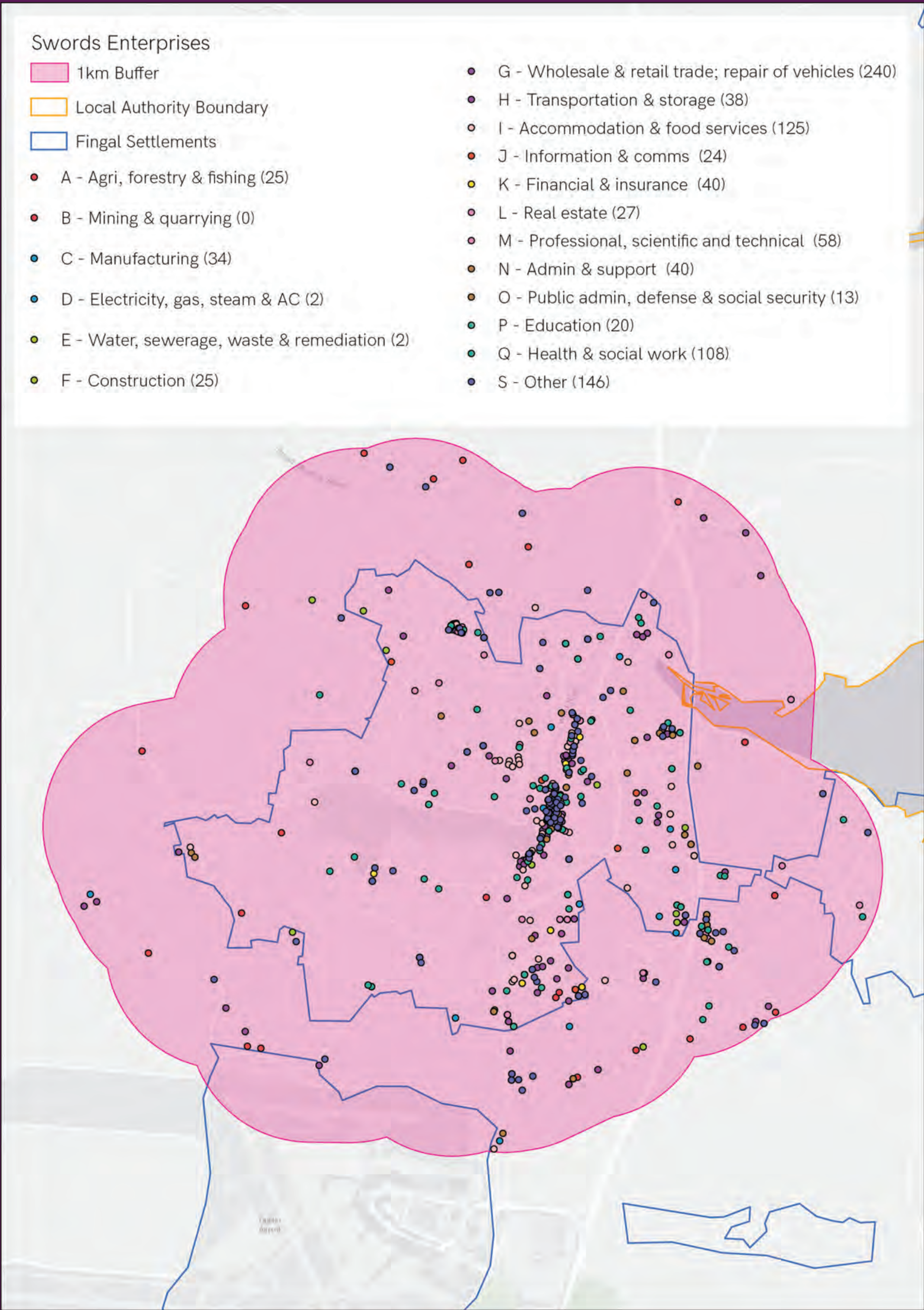


Commuting via active or public transport

Commercial properties

There are 805 businesses within Swords (accounting for 11.5% of NACE coded businesses in Fingal) with a further 162 businesses within 1km of the settlement boundary of Swords.

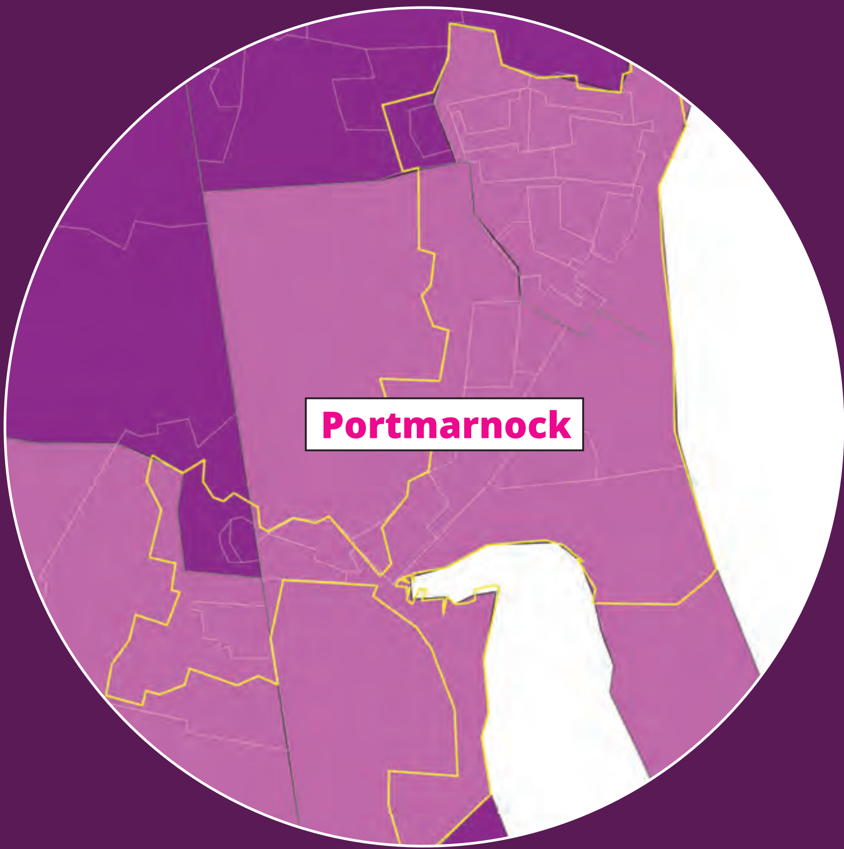
Refer overleaf


Swords Enterprises
1km Buffer
Local Authority Boundary
Fingal Settlements
A - Agri, forestry & fishing (25)
B - Mining & quarrying (0)
C - Manufacturing (34)
D - Electricity, gas, steam & AC (2)
E - Water, sewerage, waste & remediation (2)
F - Construction (25)
G - Wholesale & retail trade; repair of vehicles (240)
H - Transportation & storage (38)
I - Accommodation & food services (125)
J - Information & comms (24)
K - Financial & insurance (40)
L - Real estate (27)
M - Professional, scientific and technical (58)
N - Admin & support (40)
O - Public admin, defense & social security (13)
P - Education (20)
Q - Health & social work (108)
S - Other (146)

5.1.3 - Portmarnock

Overview of Portmarnock

Portmarnock had a population of 9,466 in 2016 which comprised 2,755 families and 3,345 total households.



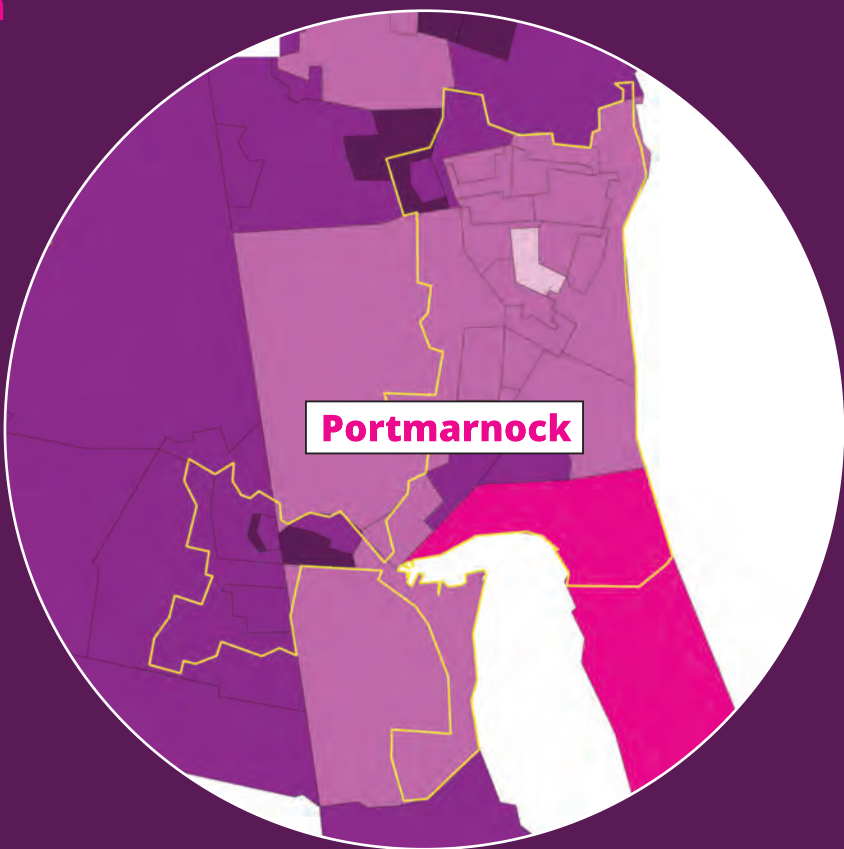
Portmarnock Settlement

Population

700 - 2,700
2,700 - 6,200
6,200 - 11,300
11,300 - 19,000
19,000 - 39,000

Affluence and **Deprivation**

There are inequalities in terms of deprivation and affluence within the settlement. There is marginally above average and overall average generally evident in the settlement and pockets of very high affluence present in pockets within and around Portmarnock.



Portmarnock Settlement

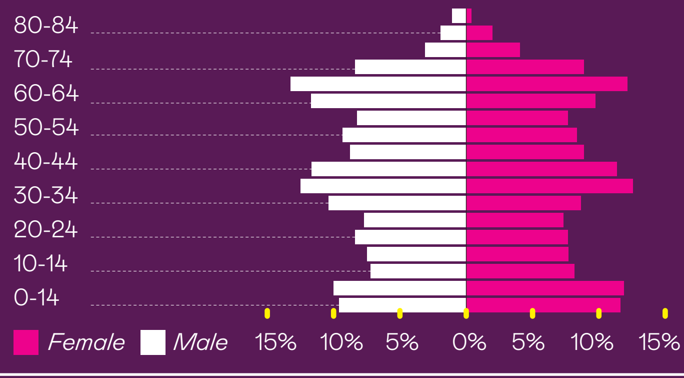
Pobal Index

Very Affluent
Affluent
Marginally above average
Marginally below average
Disadvantaged
Very disadvantaged

Social

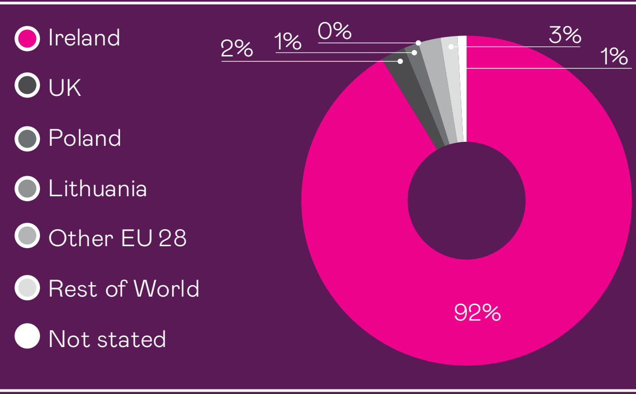
Age profile

The age profile of Portmarnock shows that 19.5% of people are under the age of 15 while 18.5% of people are over the age of 65. This is reflective of a relatively high average age of 39.5 years.



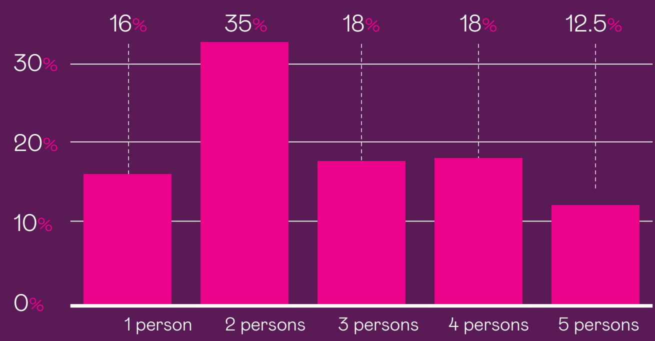
Nationality

The majority of the population are Irish nationals (92%) whilst 86% were born in Ireland. Other EU 28 comprises 3% whilst British are the next most prominent nationality (2%).



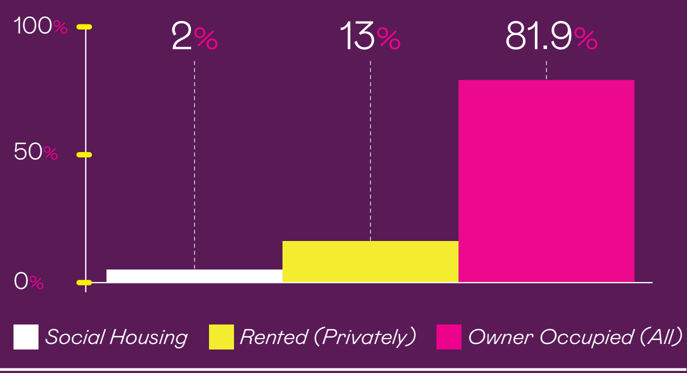
Household structure

Only 16.4% of total households are occupied by a single person. Two person households is the most common (35%) and the average household size is 2.8 as illustrated by the proportional split.



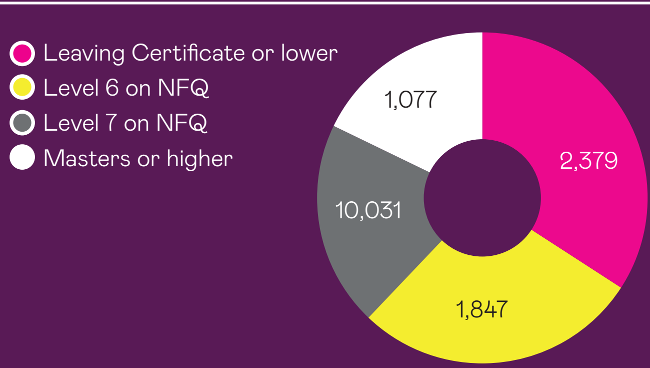
Tenure

Owner occupied tenure is predominant in Portmarnock (81.9%). 13.1% is rented from private landlords and 1.9% is social housing of which the majority is rented from the local authority.



Education

Educational attainment is relatively very high with almost 16.5% having attained postgraduate education with a further 15.75% educated to higher undergraduate degree.



Economic
and Travel

Employment

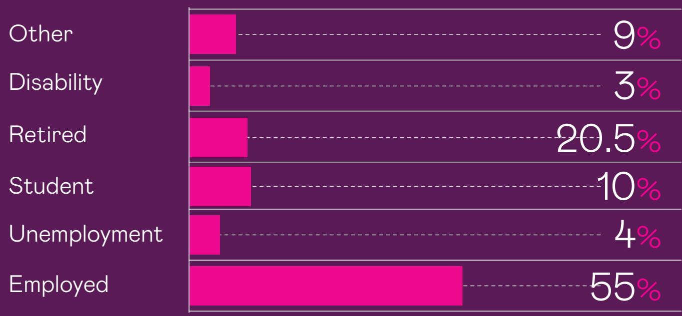
Portmarnock Settlement

Employment

- 0.5% - 4.2%
- 7.1% - 10.7%
- 4.2% - 7.1%
- 10.7% - 15.7%
- 15.7% - 24.8%

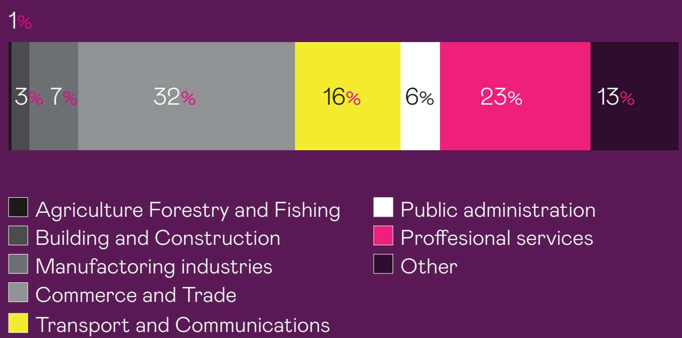
Principal economic status

More than a fifth of the population are retired, and just over half are employed whilst a small margin of 3.6% are looking for work and 9.7% are students.



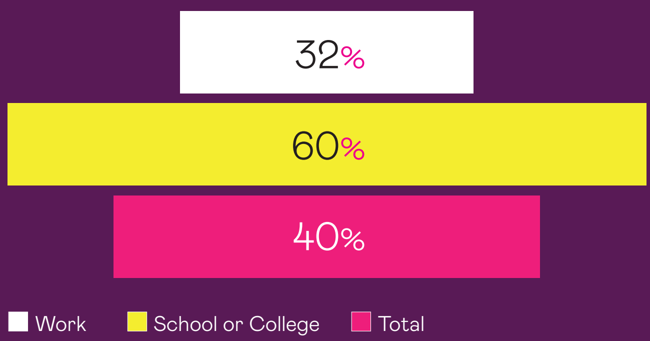
Industry of employment

Commerce and Trade is the most common industry (32.4%), followed by Professional Services (22.7%) and then Transport and Communication(13.5%). The lowest employment percentage is in Agriculture, Forestry and Fishing (only 0.1%).



Means of travel
to work and education

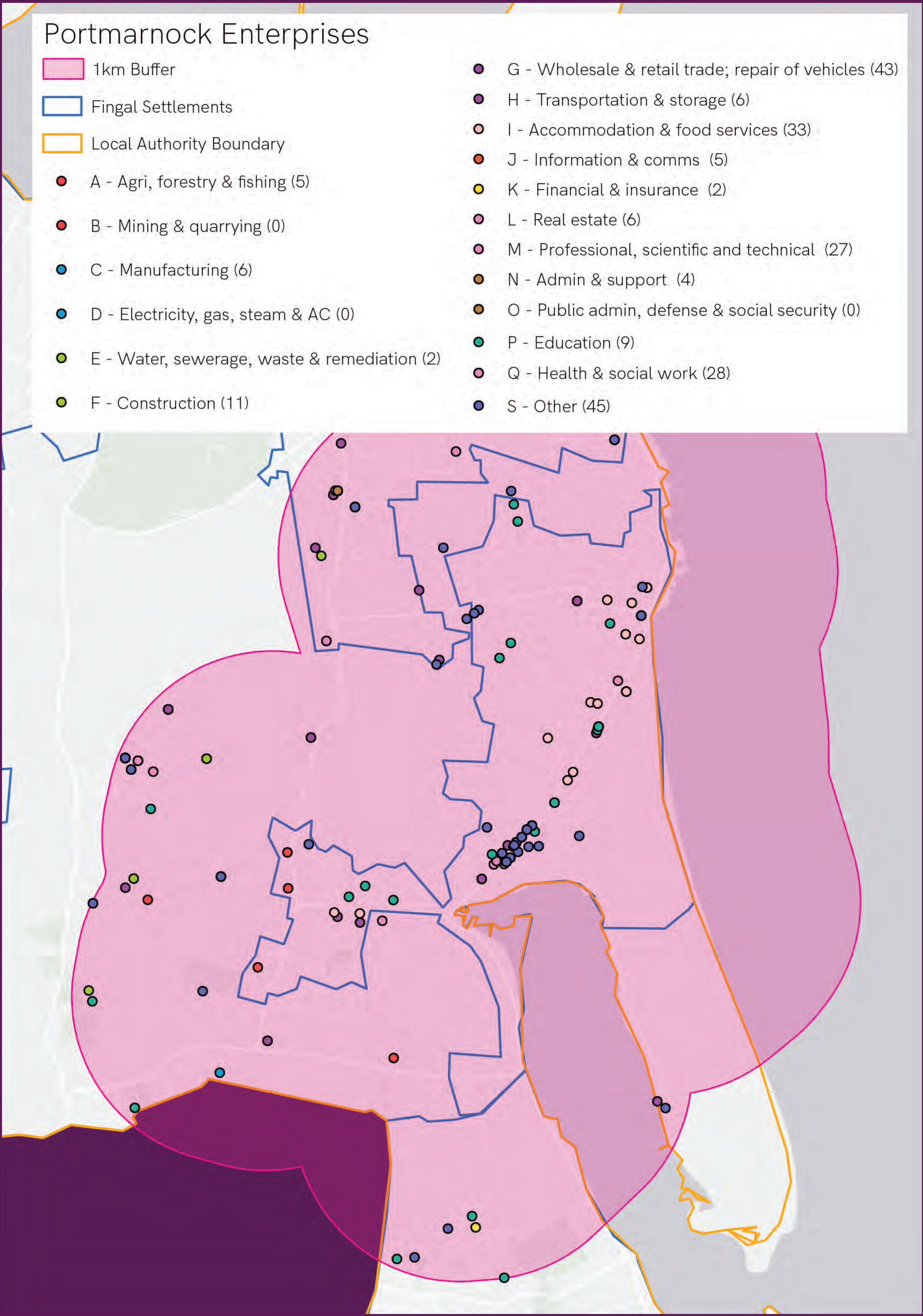
The most common form of transport to go to work or education in Portmarnock is by car (51%). Car was used more to get to work (58%) than education (37%) whilst public transport is only used by 40.3%. The dominant form of public transport is by DART and LUAS at 18.7%, likely the DART given proximity to that transport line.



Commercial properties

There are 130 businesses in Portmarnock accounting for 1.3% of NACE coded businesses in Fingal. There are a further 102 businesses within 1km of the settlement boundary

Refer overleaf



Portmarnock Enterprises
1km Buffer
Fingal Settlements
Local Authority Boundary
A - Agri, forestry & fishing (5)
B - Mining & quarrying (0)
C - Manufacturing (6)
D - Electricity, gas, steam & AC (0)
E - Water, sewerage, waste & remediation (2)
F - Construction (11)
G - Wholesale & retail trade; repair of vehicles (43)
H - Transportation & storage (6)
I - Accommodation & food services (33)
J - Information & comms (5)
K - Financial & insurance (2)
L - Real estate (6)
M - Professional, scientific and technical (27)
N - Admin & support (4)
O - Public admin, defense & social security (0)
P - Education (9)
Q - Health & social work (28)
S - Other (45)

5.1.4 - Baskin

Overview of Baskin

The settlement of Baskin has been based on a best fit approach as previously described and all information herein relates to that area.

Baskin has a total population of 416 according to the 2016 Census which comprised 110 families and 134 total households.

Baskin Settlement

Population

700 - 2,700
6,200 - 11,300
2,700 - 6,200
11,300 - 19,000
19,000 - 39,000

Affluence and **Deprivation**

The immediate settlement of Baskin is marginally above average on the Pobal Index with the southern neighbouring areas being relativelly affluent by comparison.

Baskin Settlement

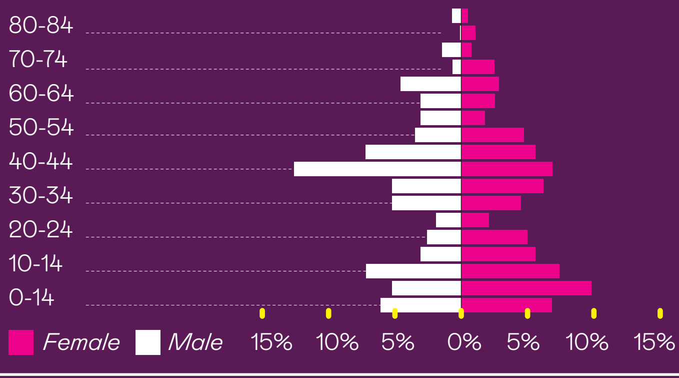
Pobal Index

Very Affluent
Affluent
Marginally above average
Marginally below average
Disadvantaged
Very disadvantaged

Social

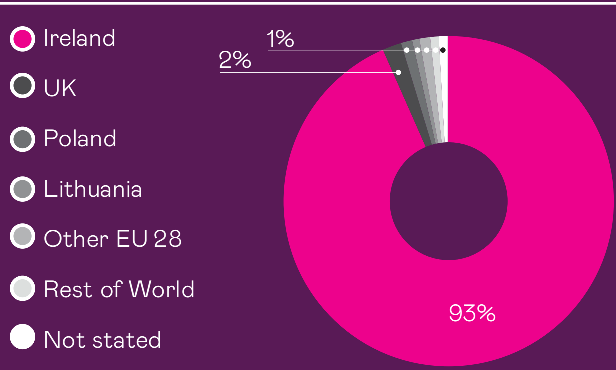
Age profile

28.8% were 14 years or under whilst 9.69% were 65 years or over which resulted in an average age of 33.2 years. However, this differed by gender (31.1 years for males and 35.5 years for females). Specifically, large variance was evident between 40-44 years.



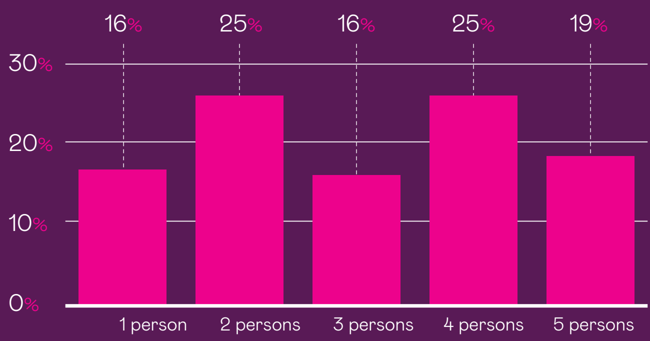
Nationality

Baskin has a very high number of Irish nationals (93%) and 91.3% were born in Ireland. The other common by nationality were British Polish and Other EU (1.9%, 1.2% and 1.2% respectively).



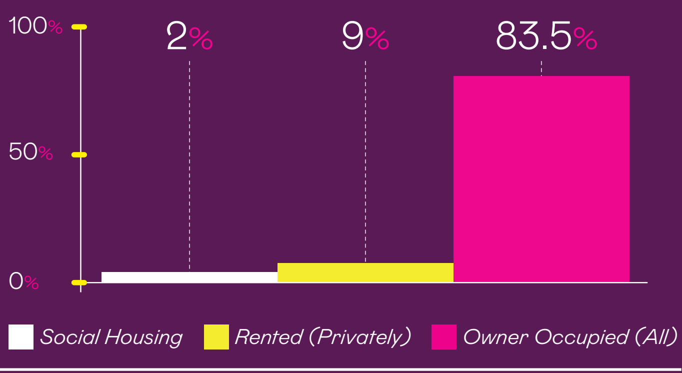
Household structure

The average household size is 3.15. Specifically, 2 person and 4 person households have the same amount out of the total, (almost a quarter each) whilst 1 person households are the least common.



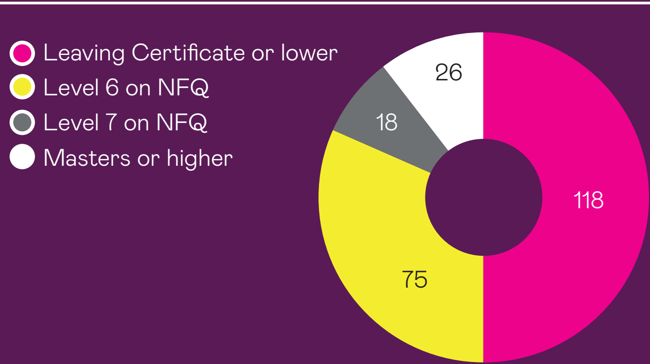
Tenure

Owner occupied tenure is most common (83.5%), followed by rental from private landlords (9%) and social housing (of which 1% was rented from the local authority and 1.9% was rented from voluntary bodies) .



Education

Educational attainment is moderate with 10.3% having attained postgraduate education and 7.14% educated to higher undergraduate degree. However almost 47% achieved Leaving Certificate or less whilst another 29.8% were educated to Level 6.



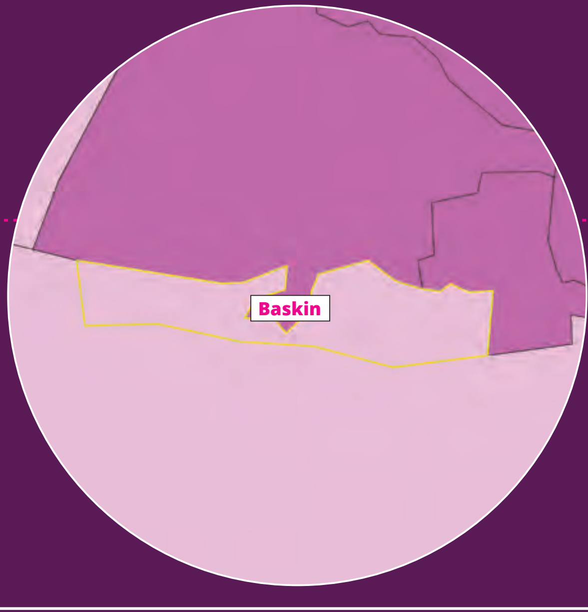
Economic
and Travel

Employment

Baskin Settlement

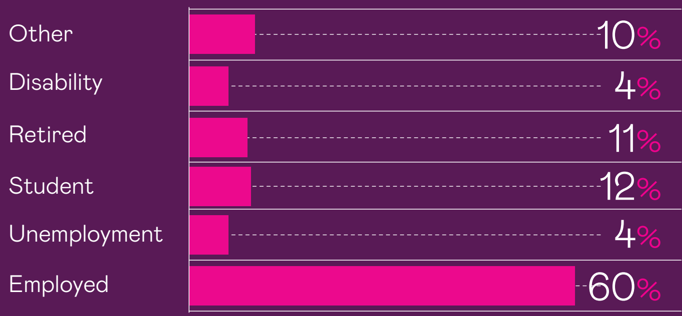
Employment

0.5% - 4.2%
7.1% - 10.7%
4.2% - 7.1%
10.7% - 15.7%
15.7% - 24.8%



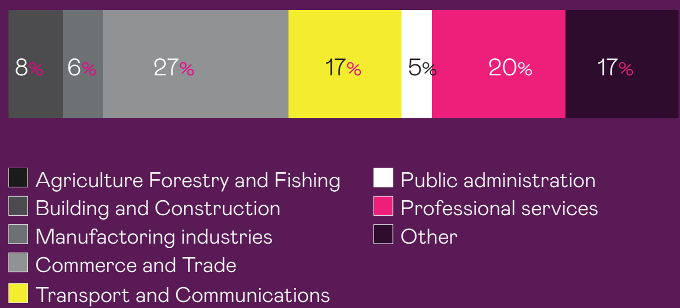
Principal economic status

59.1% of the population are employed while 4.1% are looking for work (of which 0.7% are looking for their first regular job). 11.8% are students and 10.8% are retired.



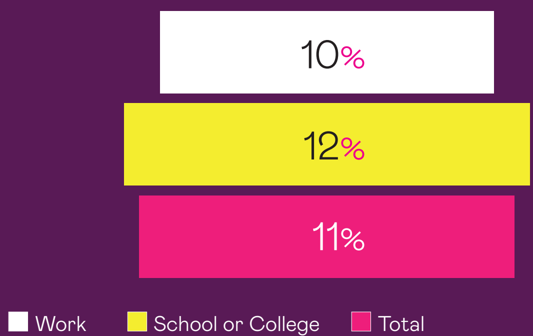
Industry of employment

Commerce and Trade takes up the majority of the employment (27.4%) in Baskin. This is followed by Professional Services (20%) and then Transport and Communication(16.6%). The lowest employment percentage is in Public Administration being at only 4.6%.



Means of travel
to work and education

The most frequent mode of transport to work or education is by car (73% of the total commuters). 69% use car to get to work and 78% to education which is relatively high. The most used form of public transport used is bus, minibus or coach (6.5%).

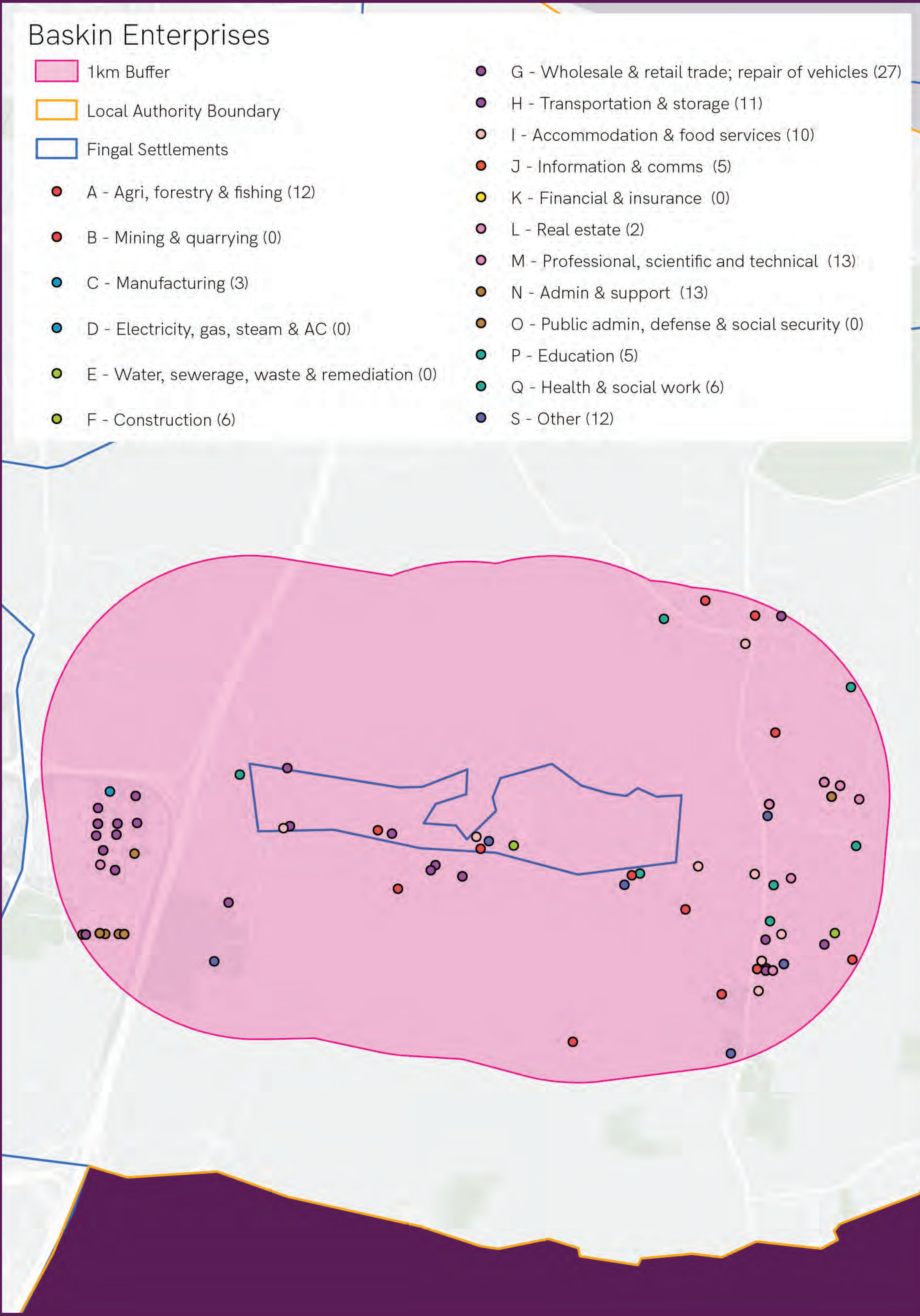


Commuting via active or public transport

Commercial properties

There are 8 businesses in Baskin (0.1% of NACE coded businesses in Fingal) with a further 117 businesses within 1km of the settlement boundary.

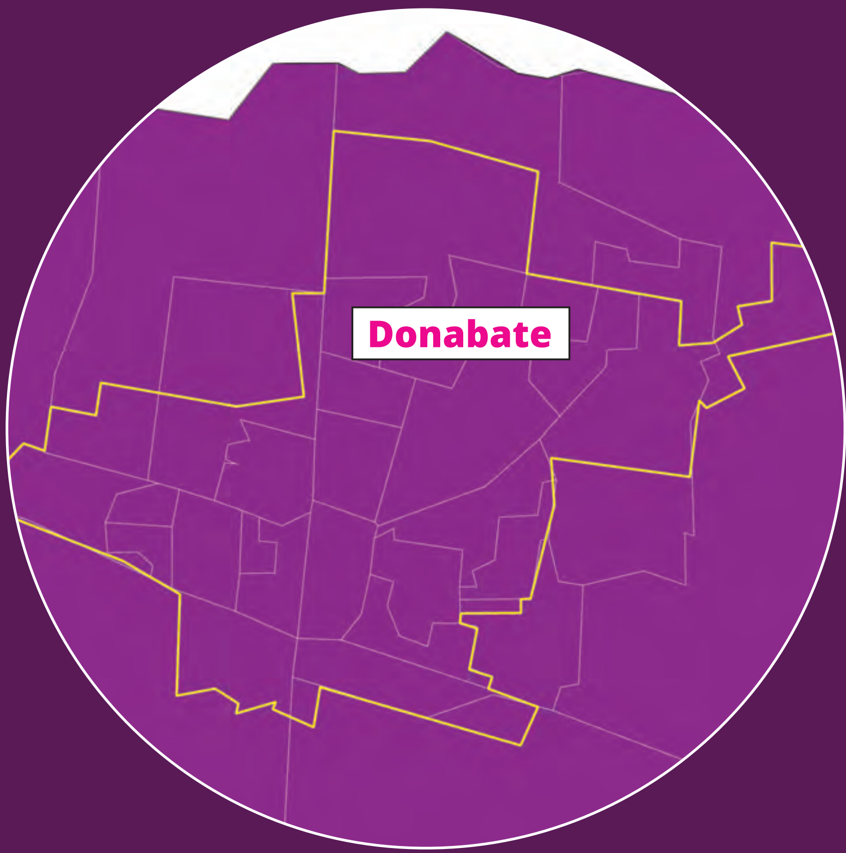
Refer overleaf


Baskin Enterprises
1km Buffer
Local Authority Boundary
Fingal Settlements
A - Agri, forestry & fishing (12)
B - Mining & quarrying (0)
C - Manufacturing (3)
D - Electricity, gas, steam & AC (0)
E - Water, sewerage, waste & remediation (0)
F - Construction (6)
G - Wholesale & retail trade; repair of vehicles (27)
H - Transportation & storage (11)
I - Accommodation & food services (10)
J - Information & comms (5)
K - Financial & insurance (0)
L - Real estate (2)
M - Professional, scientific and technical (13)
N - Admin & support (13)
O - Public admin, defense & social security (0)
P - Education (5)
Q - Health & social work (6)
S - Other (12)

5.1.5 - Donabate

Overview of Donabate

Donabate had a population of 7,433 in 2016 which comprised 1,945 families and 2,414 total households.



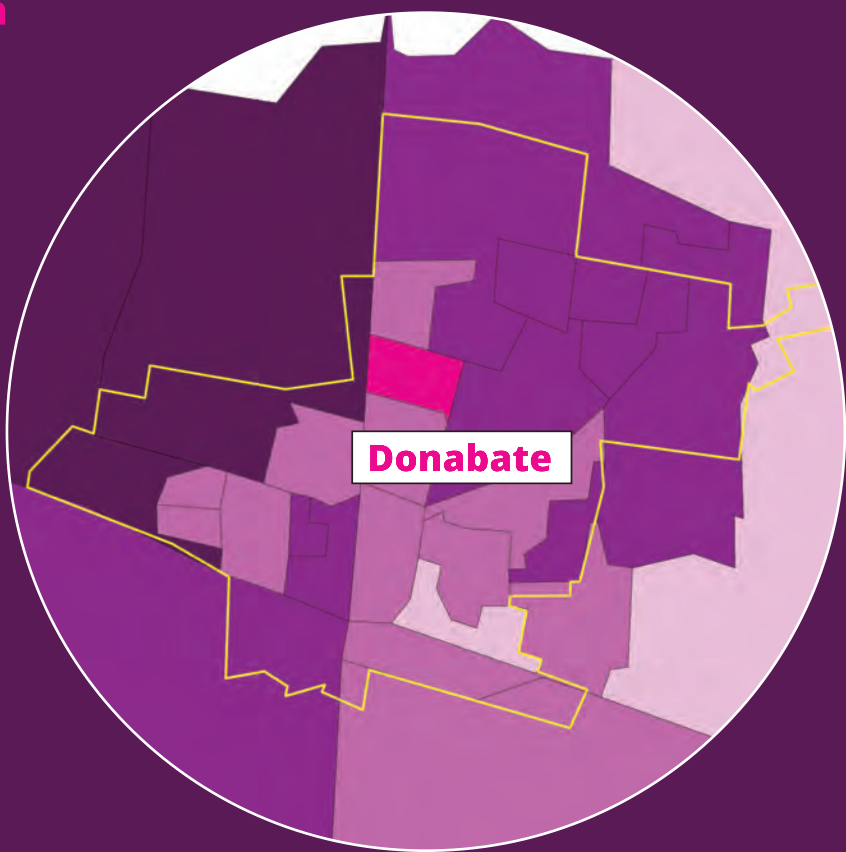
Donabate Settlement

Population

- 700 - 2,700
- 2,700 - 6,200
- 6,200 - 11,300
- 11,300 - 19,000
- 19,000 - 39,000

Affluence and Deprivation

There are inequalities in terms of deprivation and affluence within the settlement as demonstrated below, however affluence was generally evident overall with very high affluence towards the west.



Donabate Settlement

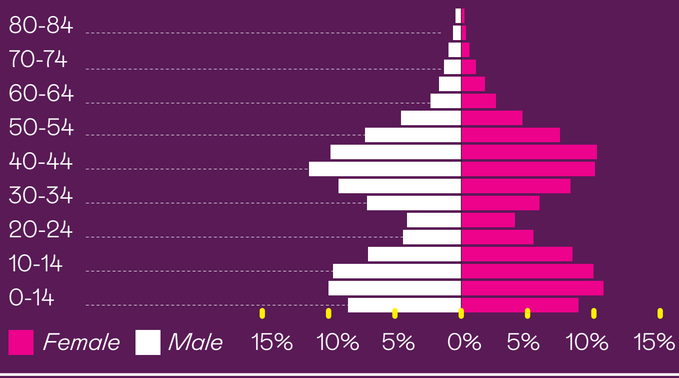
Pobal Index

- Very Affluent
- Affluent
- Marginally above average
- Marginally below average
- Disadvantaged
- Very disadvantaged

Social

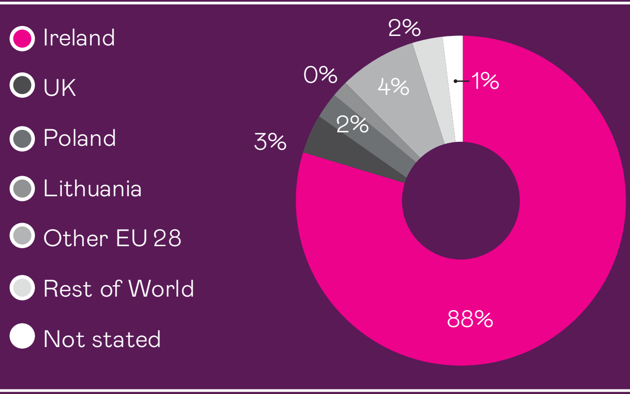
Age profile

Donabate has an average age of 31.2 years and an almost equal difference of male and females overall and per age cohort group. The proportion of young (14 years or less) is relatively high (28.7%) whilst there was just 65 years or over is relatively low (4.4%).



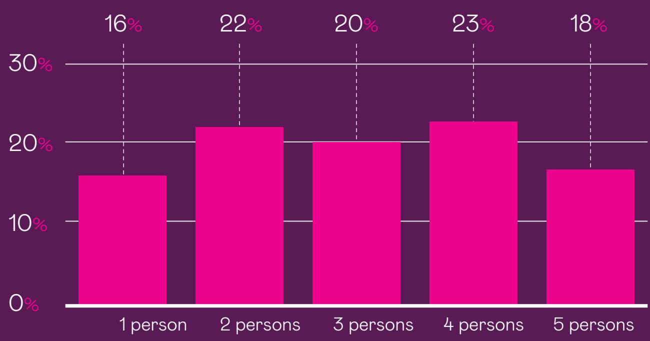
Nationality

11.7% of the population were non-Irish nationality whilst 17.3% were born overseas. The most common nationalities other than Irish were British (2.5%), Polish (1.7%), Other EU (3.7%) and rest of the world (2.4%)



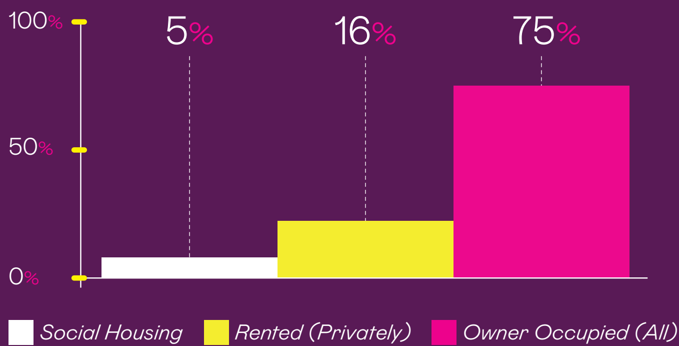
Household structure

The average household size is relatively high at 3.11 which may be attributable to high proportion of households of four persons and at least five persons when compared to other settlements.



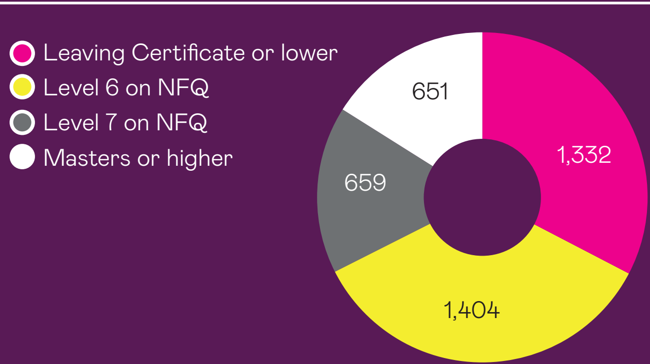
Tenure

Owner occupation is the leading tenure type (75.1%) whilst 15.9% is rented from private landlords. 4.6% is social housing of which 4.3% is rented from the local authority.



Education

Educational attainment is relatively high with 15.2% having attained postgraduate education and a further 15.4% educated to higher undergraduate degree. However 31.1% achieved Leaving Certificate or less whilst another 32.8% were educated to Level 6.



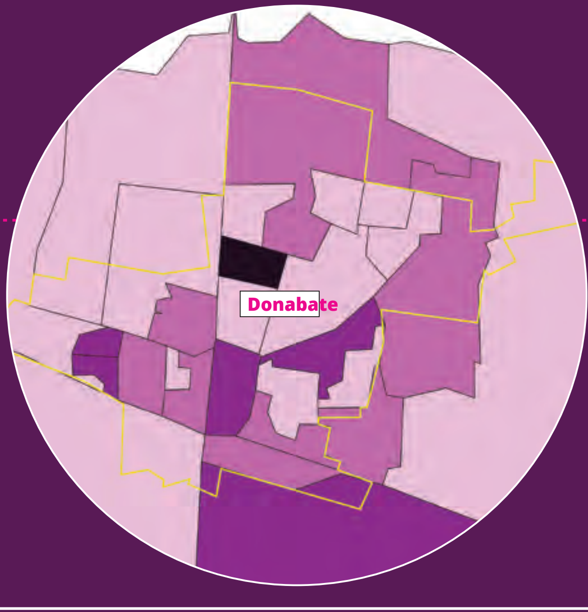
Economic and Travel

Employment

Donabate Settlement

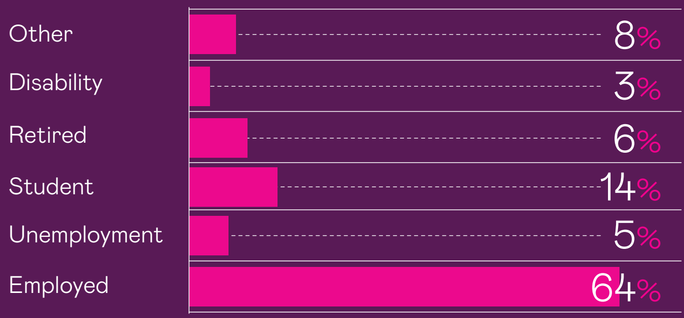
Employment

0.5% - 4.2%
7.1% - 10.7%
4.2% - 7.1%
10.7% - 15.7%
15.7% - 24.8%



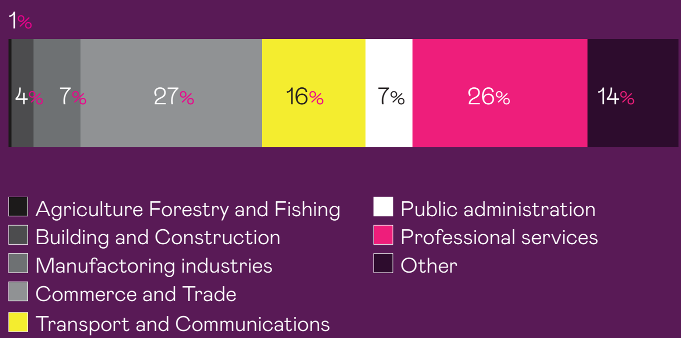
Principal economic status

From the shown graph, a large margin of the population are employed (64.2%) while notably 13.6% are students. 6.4% are retired and 0.6% of the unemployed are looking for their first regular job.



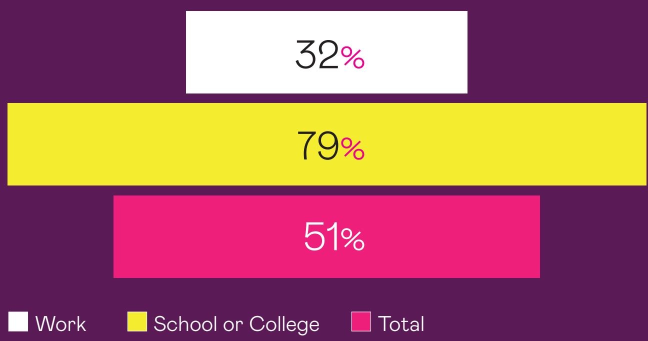
Industry of employment

Commerce and Trade takes up the majority of the employment (26.6%) in Donabate. This is followed by Professional Services (25.9%) and then Transport and Communication(15.7%). The lowest employment percentage is in Agriculture, Forestry and Fishing, being at only 0.5%.



Means of travel to work and education

The most common form of transport to go to work or education in Donabate is by car (41%), followed by walking (25.1%). Car was more common to get to work (56%) than education (18.1%) whilst walking was more common for students (58.6% compared to 3.1% for employees). Public transport is only used by 24.3% of which train, DART or Luas dominated (19.6%) given the presence the railway line.

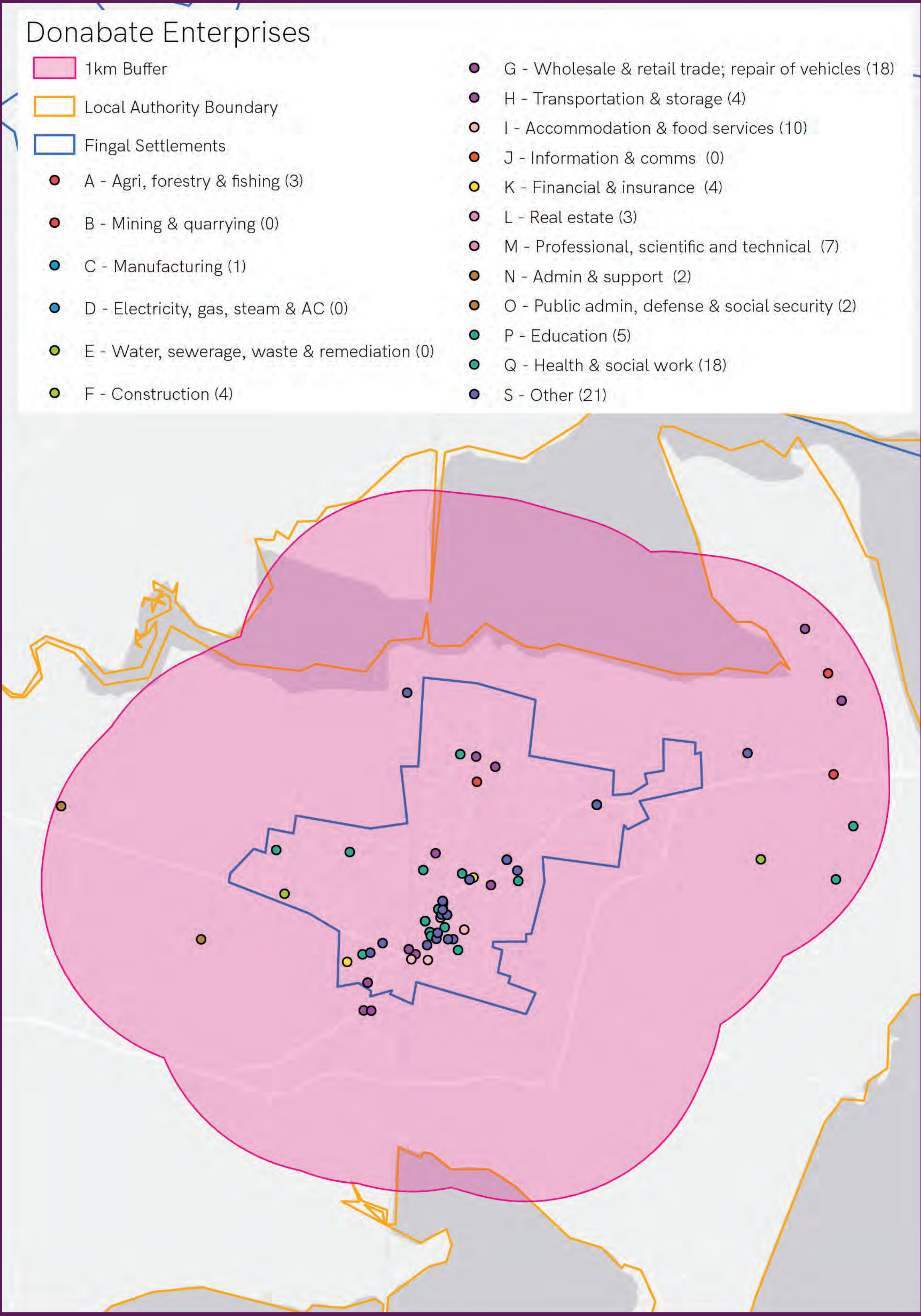


Commuting via active or public transport

Commercial properties

There are 89 businesses in Donabate (accounting for 1.3% of NACE coded businesses in Fingal) with a further 13 businesses within 1km of the settlement boundary.

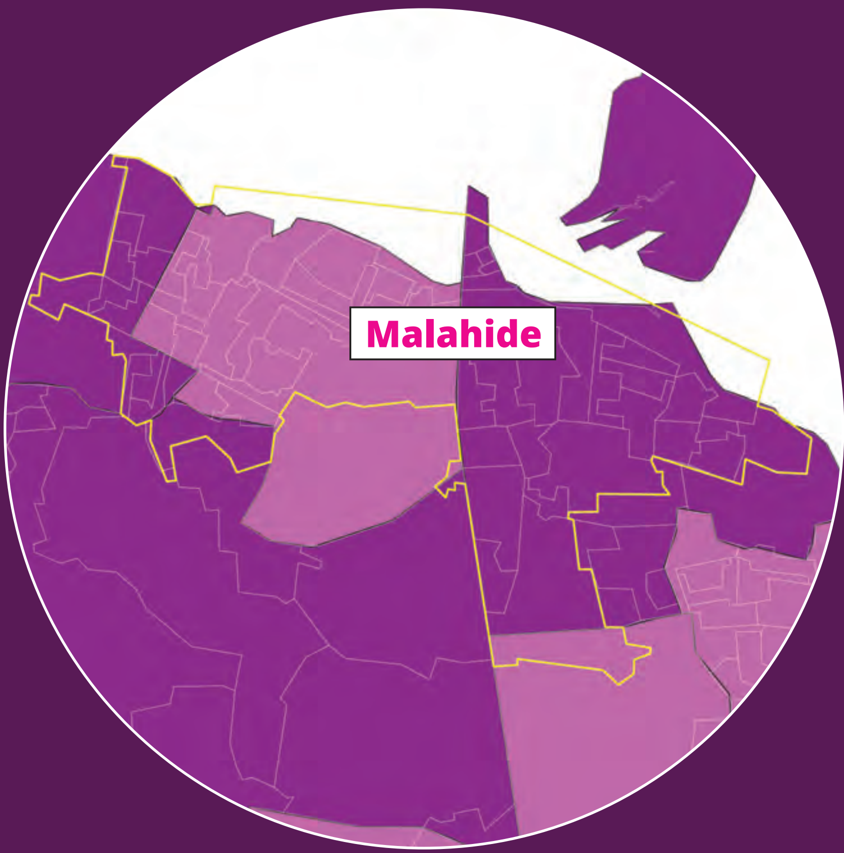
Refer overleaf


Donabate Enterprises
1km Buffer
Local Authority Boundary
Fingal Settlements
A - Agri, forestry & fishing (3)
B - Mining & quarrying (0)
C - Manufacturing (1)
D - Electricity, gas, steam & AC (0)
E - Water, sewerage, waste & remediation (0)
F - Construction (4)
G - Wholesale & retail trade; repair of vehicles (18)
H - Transportation & storage (4)
I - Accommodation & food services (10)
J - Information & comms (0)
K - Financial & insurance (4)
L - Real estate (3)
M - Professional, scientific and technical (7)
N - Admin & support (2)
O - Public admin, defense & social security (2)
P - Education (5)
Q - Health & social work (18)
S - Other (21)

5.1.6 - Malahide

Overview of Malahide

Malahide had a population of 16,550 in 2016 which comprised 4,646 families and 5,753 total households.



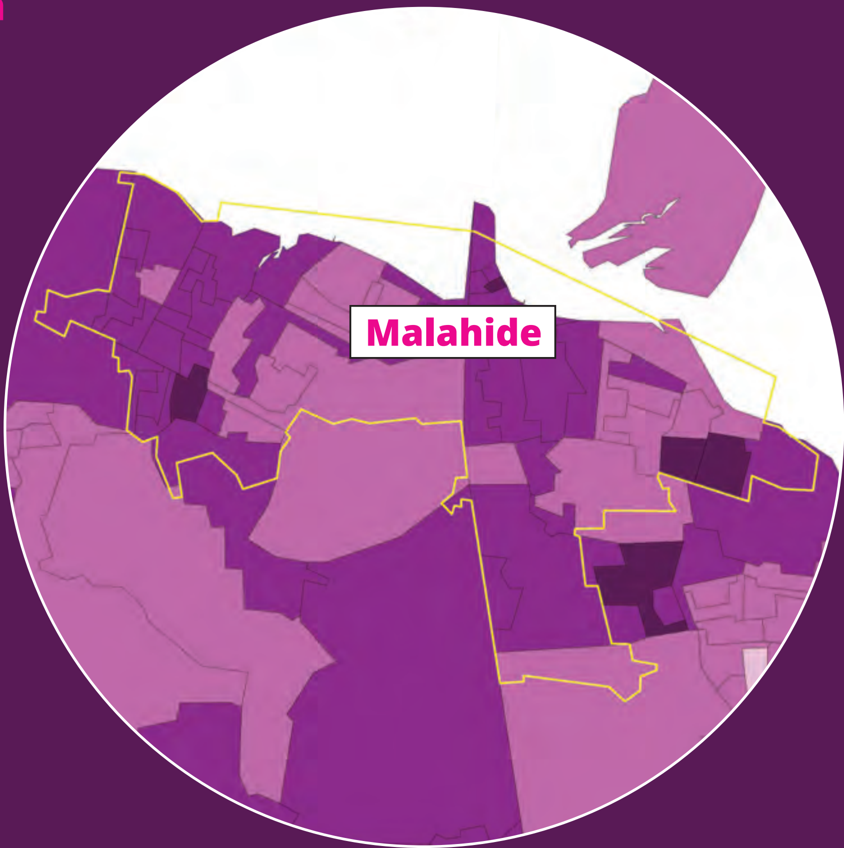
Malahide Settlement

Population

700 - 2,700
6,200 - 11,300
2,700 - 6,200
11,300 - 19,000
19,000 - 39,000

Affluence and Deprivation

Affluence was generally evident across Malahide as illustrated with particular areas of high affluence to the east and west and in the areas surrounding the settlement.



Malahide Settlement

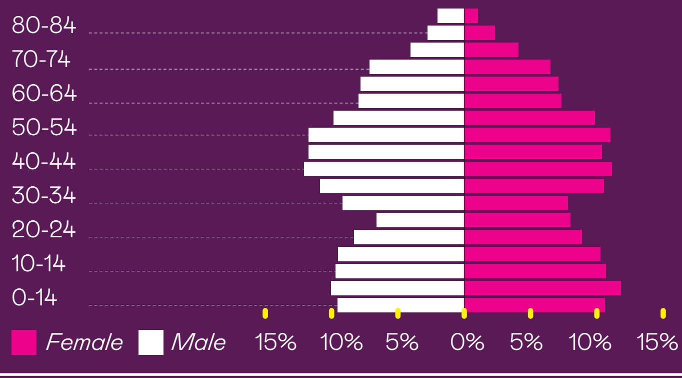
Pobal Index

Very Affluent
Affluent
Marginally above average
Marginally below average
Disadvantaged
Very disadvantaged

Social

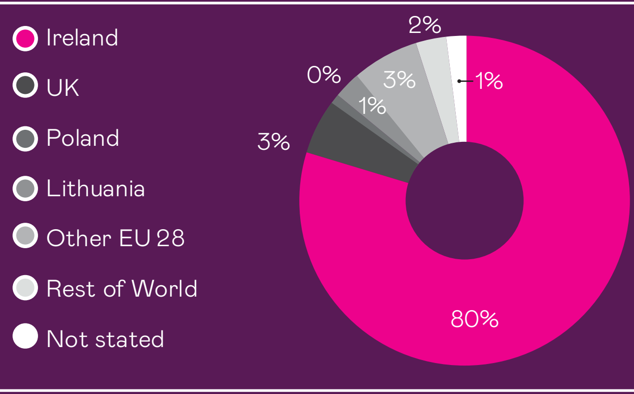
Age profile

The average age is relatively high at 38.1 years. There was little variance between males and females and overall 20.7% of the population is below the age of 15 whilst the older (65 years and above) proportion was 15%.



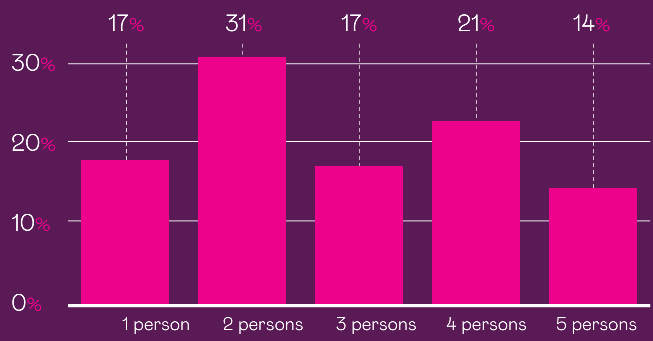
Nationality

Diversity was lower than other settlements as 10.3% identified as non-Irish whilst 16.7% were born overseas. British, other EU and the rest of the world were the most common nationalities (2.9%, 3.1% and 2.7% respectively)



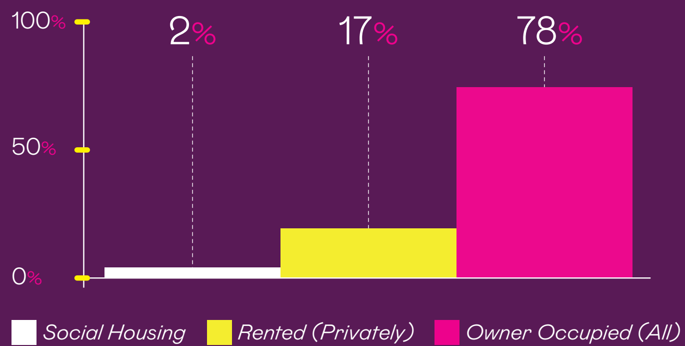
Household structure

The average household size is 2.88 per household and two person households are the most dominant (30.6%) followed by four person households (21%) and a relatively high proportion of one person households (17.3%).



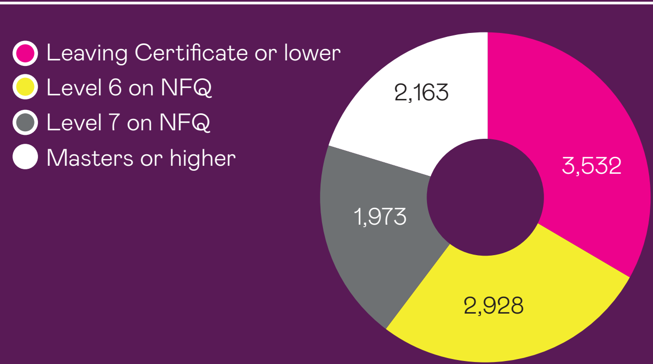
Tenure

Owner occupation is the most common tenure type (77.9%) whilst 17% is rented from private landlords and just 2.4% is social housing (of which 2% rented from the local authority).

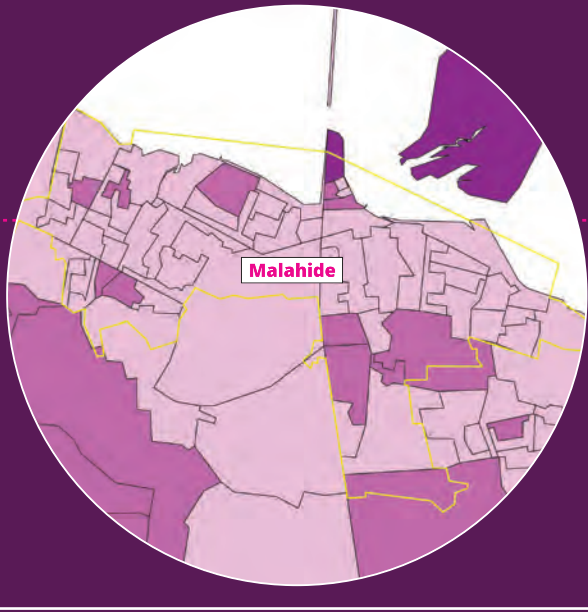


Education

Educational attainment is relatively very high with 19.8% having attained postgraduate education and a further 18.06% educated to higher undergraduate degree.



Economic
and Travel



Employment

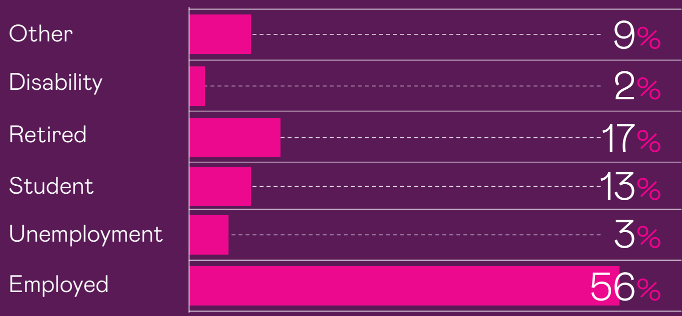
Malahide Settlement

Employment

0.5% - 4.2%
7.1% - 10.7%
4.2% - 7.1%
10.7% - 15.7%
15.7% - 24.8%

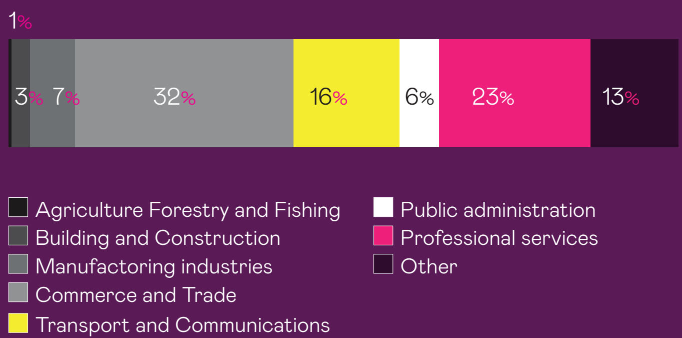
Principal economic status

Malahide has a relatively high number of retired people (16.7%) and relatively low unemployment (3.2%). 56.1% are employed and students equate to 13.1%.



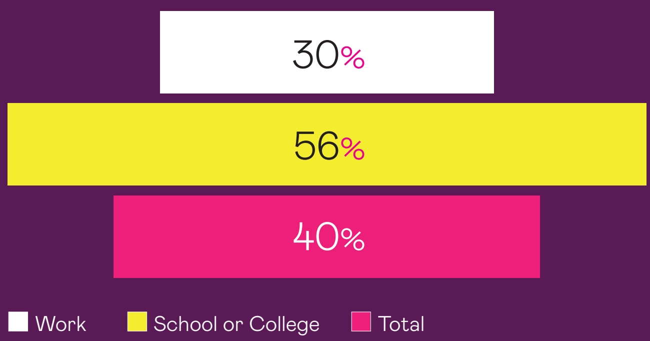
Industry of employment

Commerce and Trade is the most dominant industry (32.4%), followed by Professional Services (22.7%) and then Transport and Communication (15.8%). The lowest employment percentage is in the Agriculture, Forestry and Fishing industry (0.2%).



Means of travel
to work and education

The most frequent mode of transport is via car, which is used by 53% of commuters (of which 59% use car to get to work and 41% to education). 25.2% of students travel to school on foot whilst the most used form of public transport used by all commuters is Train, DART of Luas (16.1% overall, 18.3% of employees and 12.1% of students).



Commuting via active or public transport

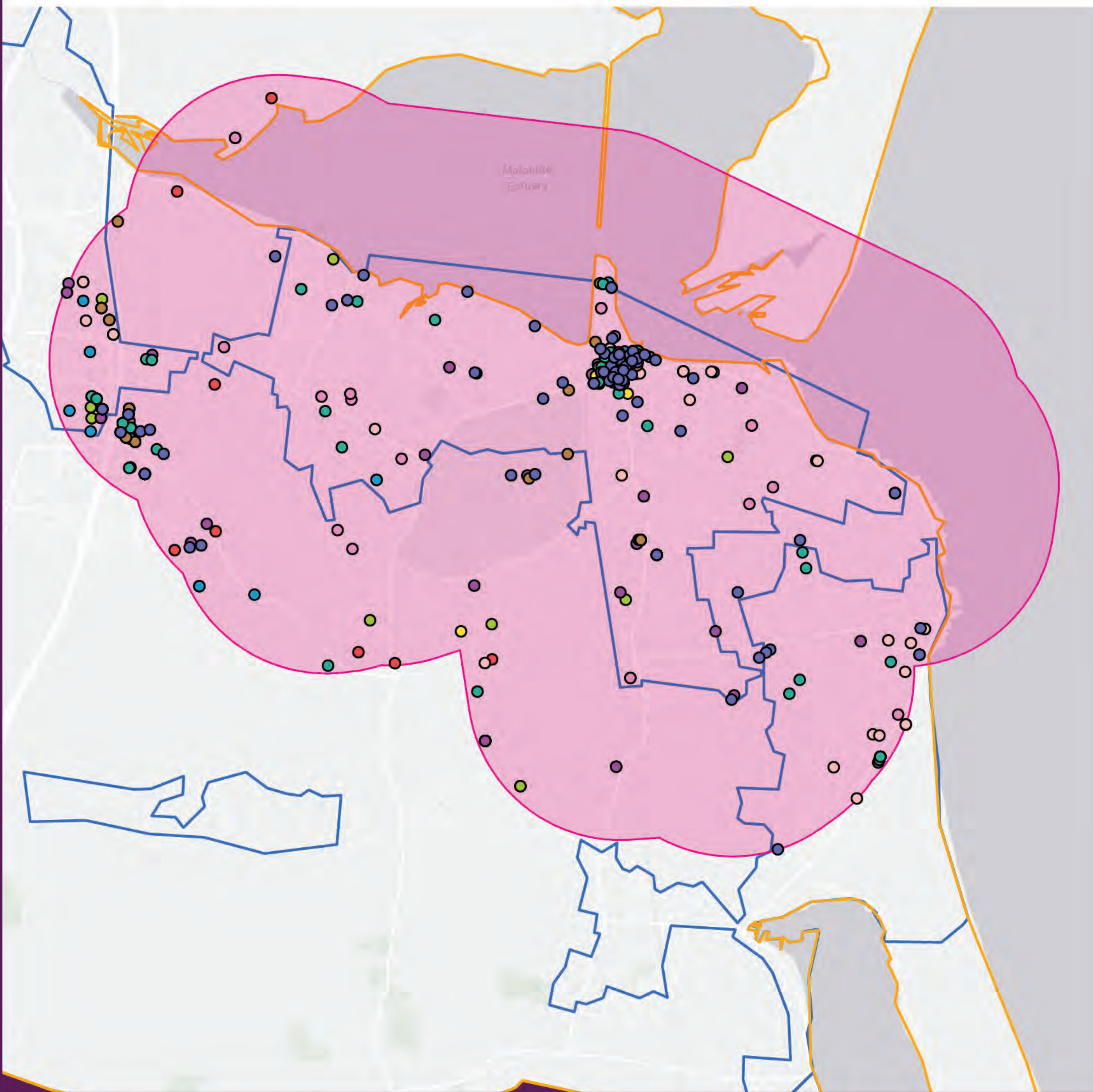
Commercial properties

There are 345 businesses in Malahide (accounting for 4.9% of NACE coded businesses in Fingal) with a further 214 businesses within 1km of the settlement boundary.

Refer overleaf

Malahide Enterprises

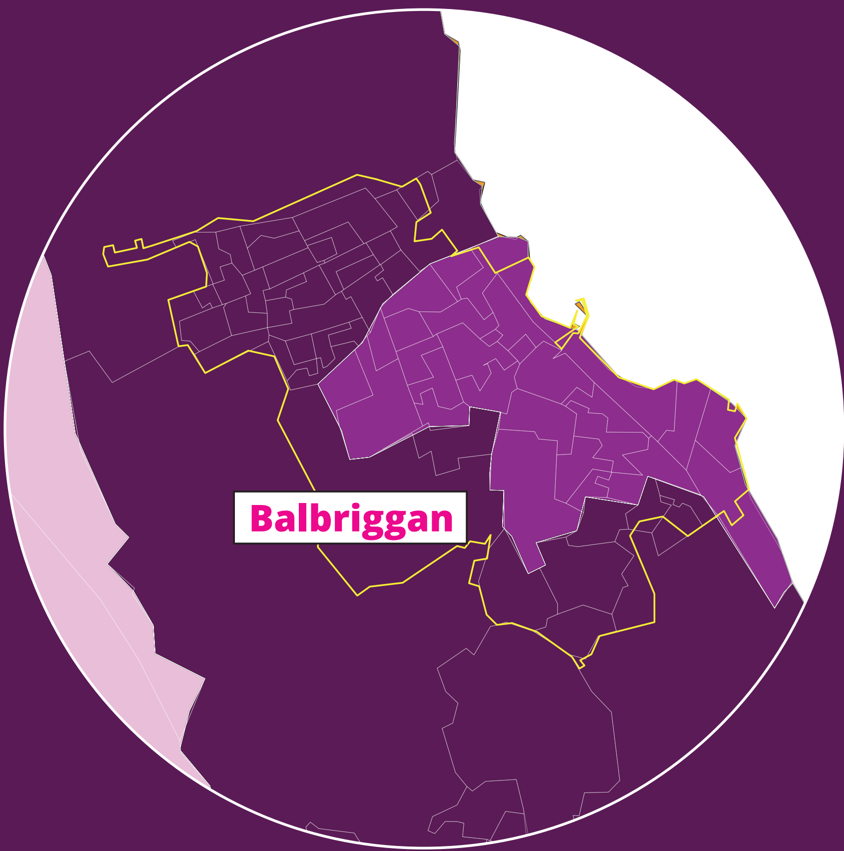
- 1km Buffer
- Local Authority Boundary
- Fingal Settlements
- A - Agri, forestry & fishing (10)
- B - Mining & quarrying (0)
- C - Manufacturing (22)
- D - Electricity, gas, steam & AC (0)
- E - Water, sewerage, waste & remediation (2)
- F - Construction (18)
- G - Wholesale & retail trade; repair of vehicles (88)
- H - Transportation & storage (14)
- I - Accommodation & food services (83)
- J - Information & comms (16)
- K - Financial & insurance (23)
- L - Real estate (18)
- M - Professional, scientific and technical (61)
- N - Admin & support (19)
- O - Public admin, defense & social security (6)
- P - Education (19)
- Q - Health & social work (62)
- S - Other (97)



5.1.7 - Balbriggan

Overview of Balbriggan

Balbriggan has a population of 21,722 in 2016 which comprised 5,782 families and 7,276 total households.



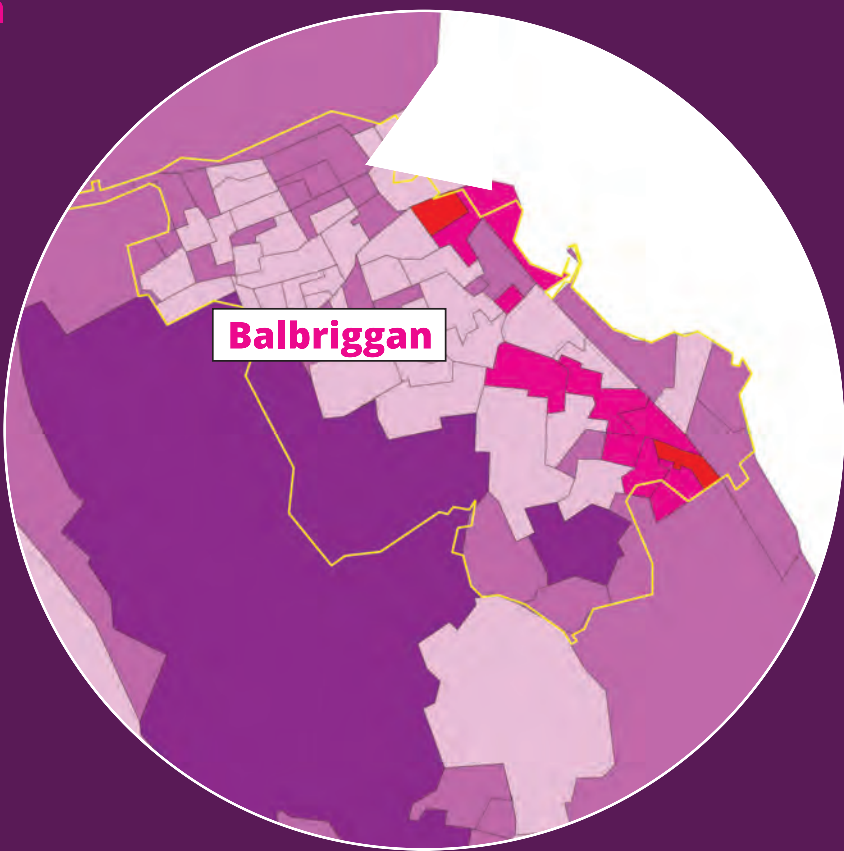
Balbriggan Settlement

Population

- 700 - 2,700
- 2,700 - 6,200
- 6,200 - 11,300
- 11,300 - 19,000
- 19,000 - 39,000

Affluence and **Deprivation**

Slight disadvantage was generally evident across Balbriggan. There are particular areas of disadvantage with pockets of very disadvantaged to the north and south east of the settlement.



Balbriggan Settlement

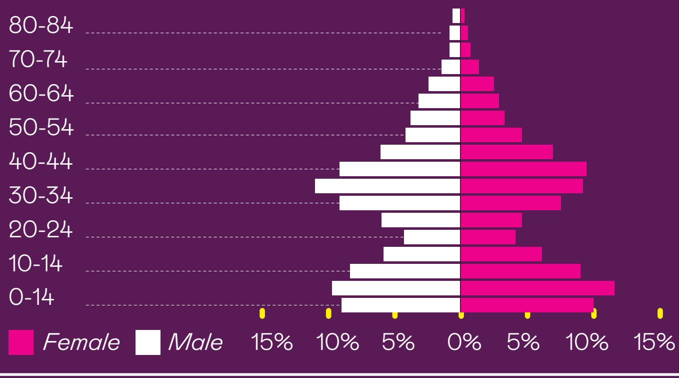
Pobal Index

- Very Affluent
- Affluent
- Marginally above average
- Marginally below average
- Disadvantaged
- Very disadvantaged

Social

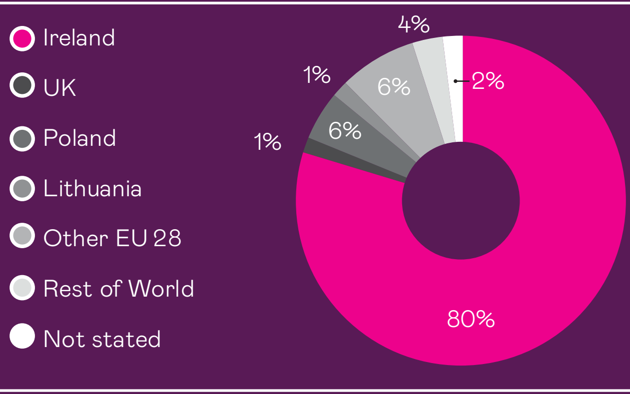
Age profile

Balbriggan has an average age demographic of 30.4 years which is relatively young. 30.4% are under the age of 15 and 5.9% over the age of 64 with relatively comparable gender splits per cohort.



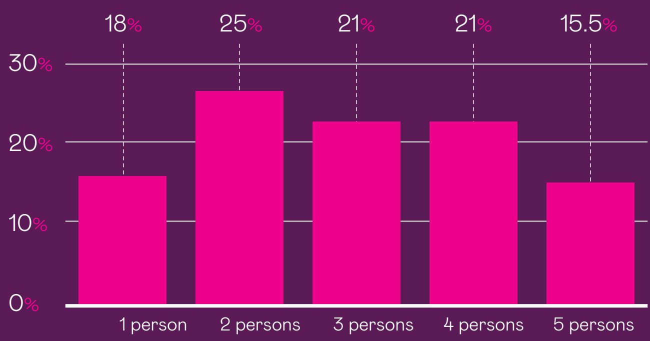
Nationality

There is a very diverse population with 27% born overseas and 20.5% non-Irish nationals. There is a particularly high proportion of Polish (5.9%), other EU and rest of the world (5.74% and 4.5% respectively whilst British and Lithuanian nationals are also common (1.3% and 1.4%)



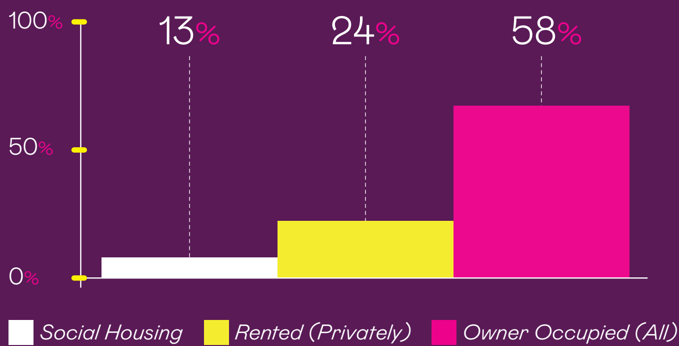
Household structure

The average household size is 3 people per household, with most household sizes in and around 20%. Two person households are the most common (24.7%) whilst five and one person households are the least common.



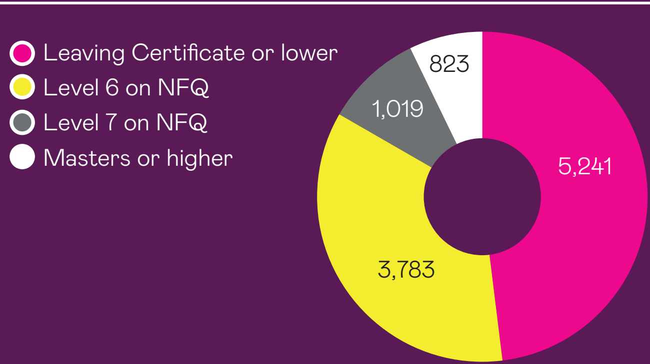
Tenure

Owner occupation is the dominant tenure type is (58%), albeit this is lower than other settlements. 24.4% of households rent from private landlords whilst 13.3% is social housing (of which 12% rent from the local authority).



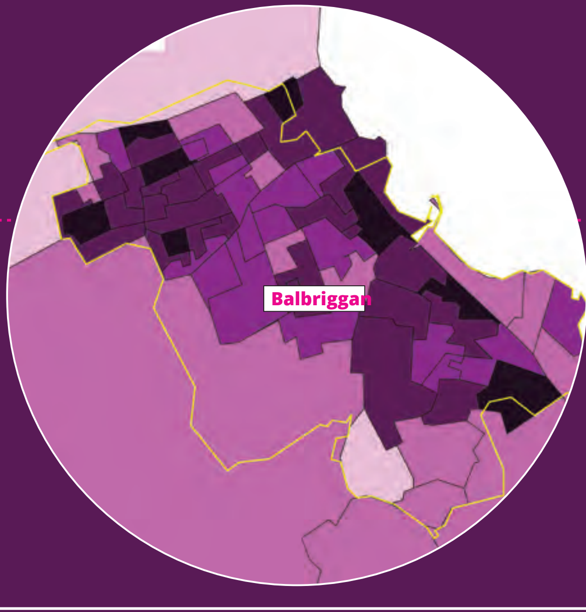
Education

Educational attainment is relatively low with 7.05% having attained postgraduate education and 8.7% educated to higher undergraduate degree. Almost 45% achieved Leaving Certificate or less whilst another 32.4% were educated to Level 6.



Economic
and Travel

Employment



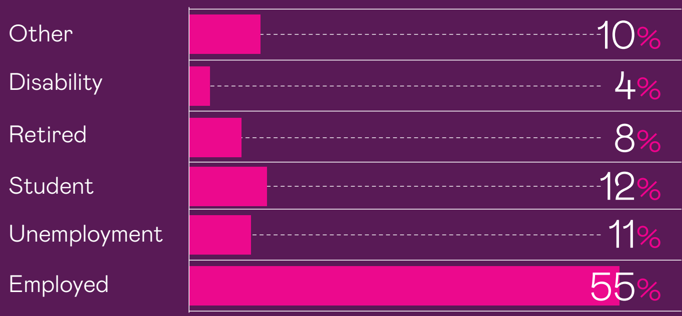
Balbriggan Settlement

SA Employment 2016

0.5% - 4.2%
7.1% - 10.7%
4.2% - 7.1%
10.7% - 15.7%
15.7% - 24.8%

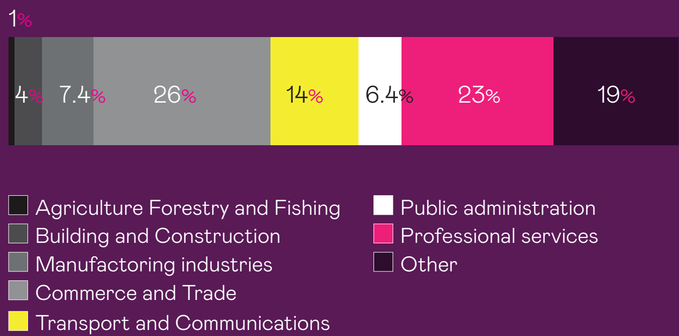
Principal economic status

There is a high percentage of unemployed people (11.3%) compared to other settlements, of which just 1.7% are looking for their first job. 55.4% are employed (with differences evident between males and females – 61.9% and 44.5% respectively) and significant gender disparity in those that stay at home (16.1% of females compared to 1.7% of males).



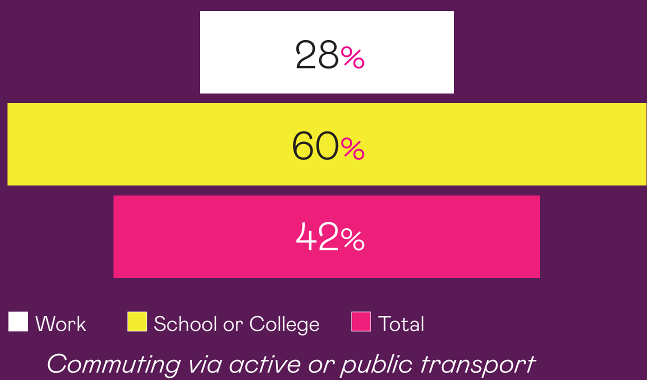
Industry of employment

Commerce and Trade takes up the majority of the employment (26.3%), followed by Professional Services (22.6%) and then Transport and Communication (13.5%). The lowest employment percentage is in Agriculture, Forestry and Fishing (just 0.6%).



Means of travel
to work and education

The most common form of commuting is by car (50%), particularly to work (61%) rather than education (33%). Active transport is used by 24.7% whilst public transport is used by 17.1%. The most common dominant public transport mode is by rail (9.7%) and significantly almost 44% of those going to education travel on foot.

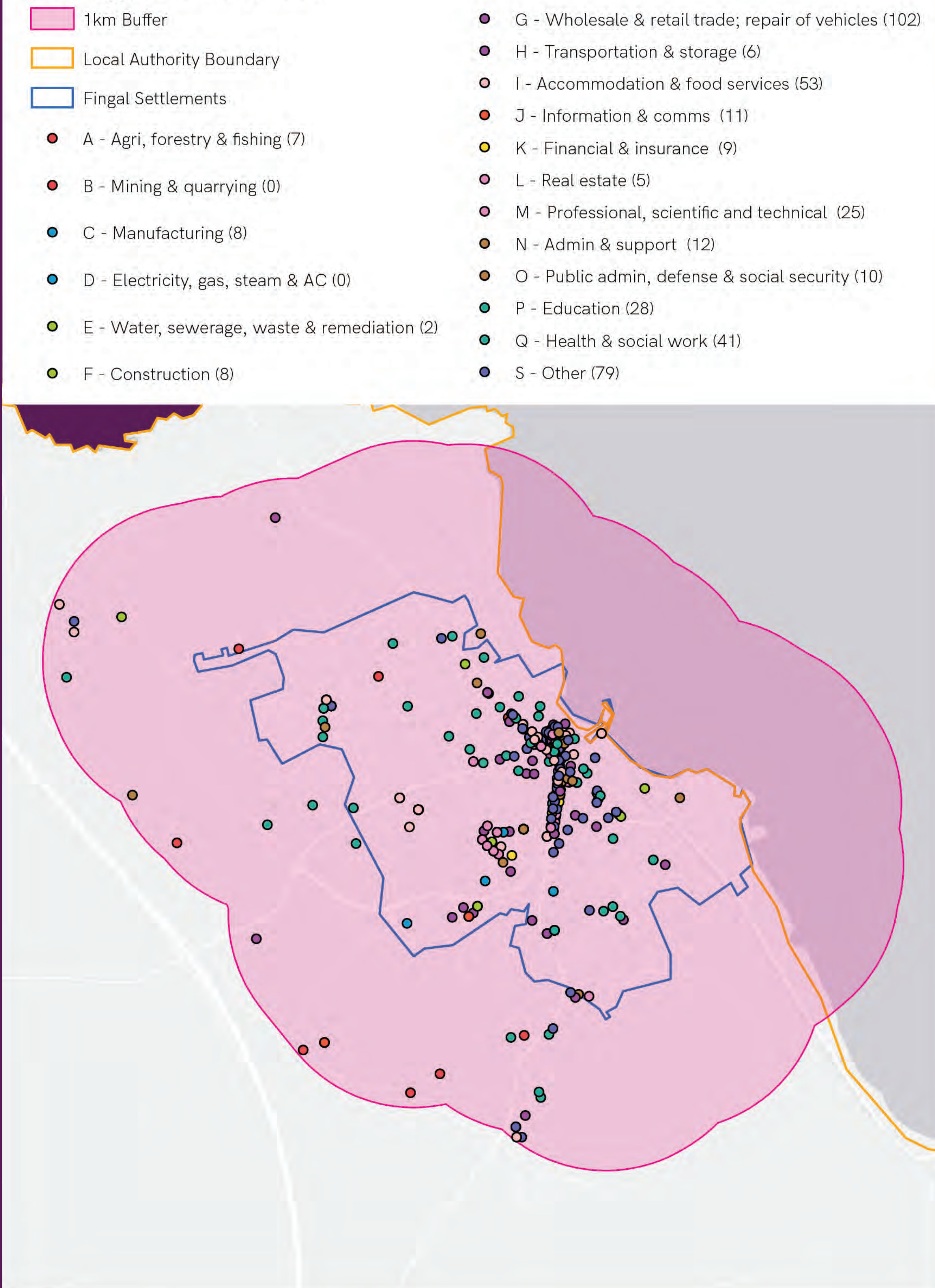


Commercial properties

There are 370 businesses in Balbriggan (accounting for 5.3% of NACE coded businesses in Fingal) with a further 36 businesses within 1km of the settlement boundary.

Refer overleaf

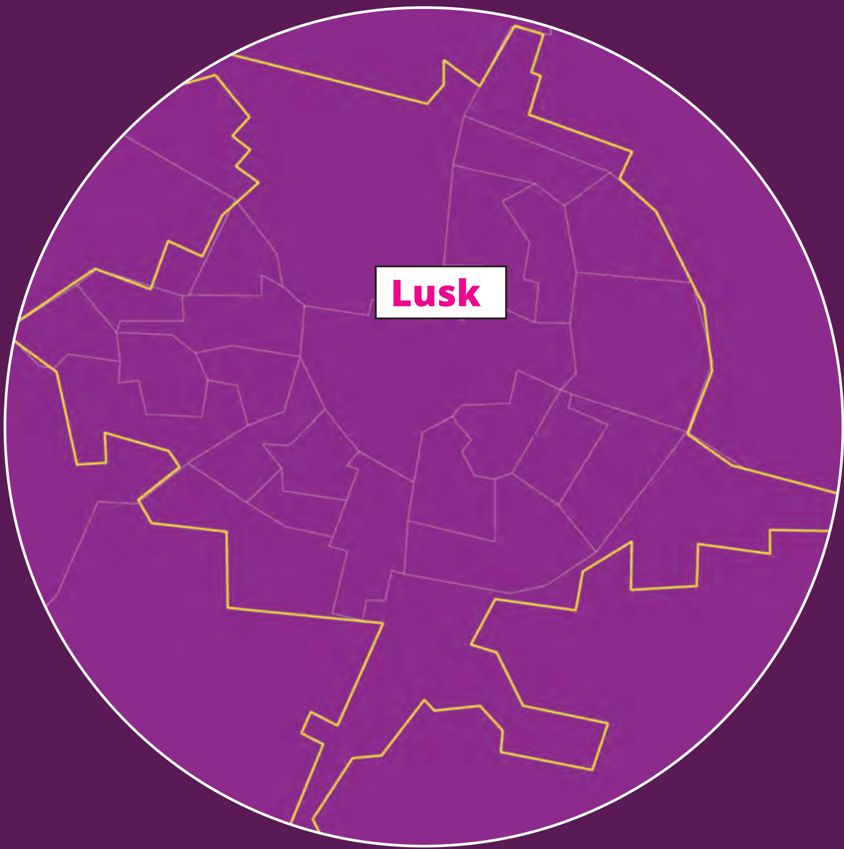
Balbriggan Enterprises



5.1.8 - Lusk

Overview of Lusk

Lusk had a population of 7,786 in 2016 which comprised 2,096 families and 2,460 total households.



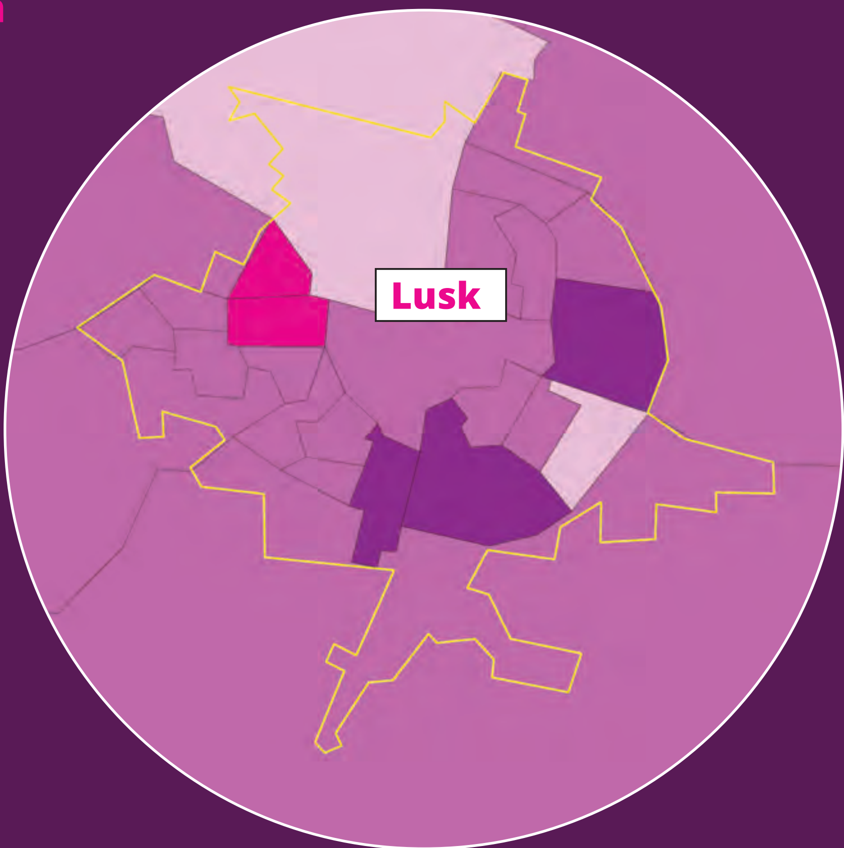
Lusk Settlement

Population

700 - 2,700
6,200 - 11,300
2,700 - 6,200
11,300 - 19,000
19,000 - 39,000

Affluence and Deprivation

Slight affluence was generally evident in Lusk with particular areas of affluence to the south-east . Disadvantage was also evident towards the north-west.



Lusk Settlement

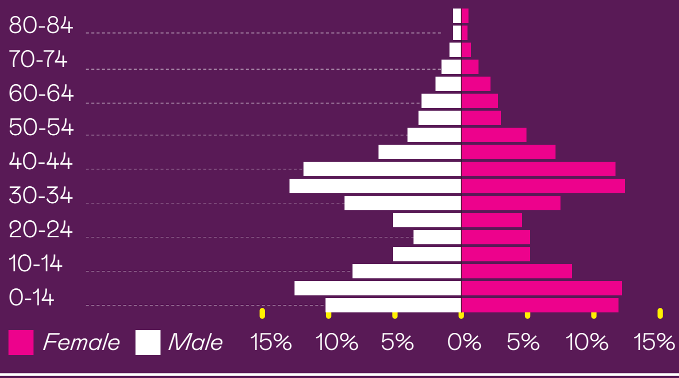
Pobal Index

Very Affluent
Affluent
Marginally above average
Marginally below average
Disadvantaged
Very disadvantaged

Social

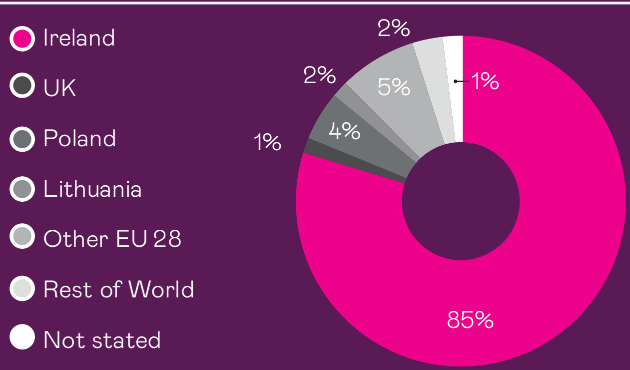
Age profile

The average age is 30.1 years which is relatively low and attributable to the high proportion under 15 years (31.5%). Further, just 5.4% is above 65 years which is also relatively low by comparison. Generally there was little variation in the age profile between genders.



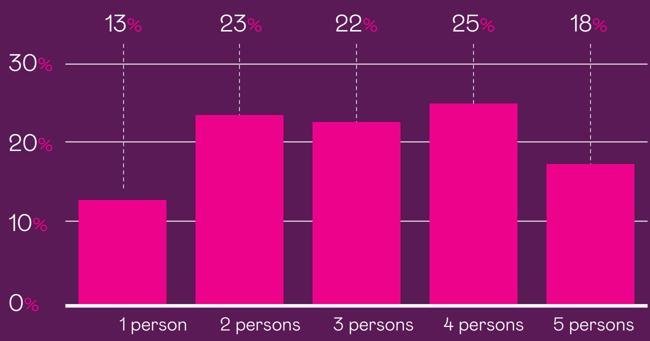
Nationality

Diversity is evident in Lusk with 20.1% born overseas and 14.5% non-Irish nationals. The most common other nationalities are Polish (3.8%), Lithuanian, British (both 1.6%) along with other EU and the rest of the world (4.6% and 2.1% respectively). Interestingly by birthplace were born in the UK whilst 6% were born in the rest of the world.



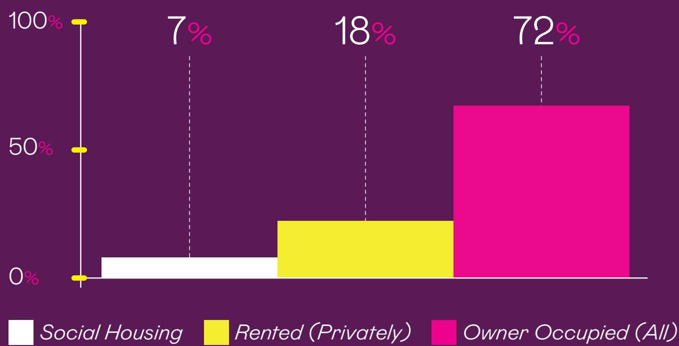
Household structure

The average number of people per household is 3.18. Four person households are most common, followed by two person and comparatively one person households are relatively uncommon and less than five person households overall.



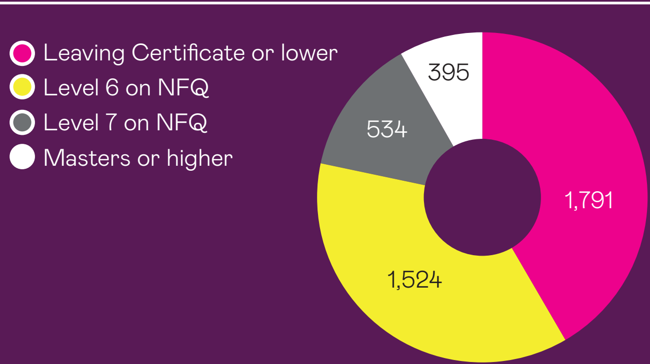
Tenure

Owner occupation is the most common tenure type (72.6%), followed by private rental (18.3%) and social housing (6.5%). Rental from the local authority is the most common type of social housing (6.2%)

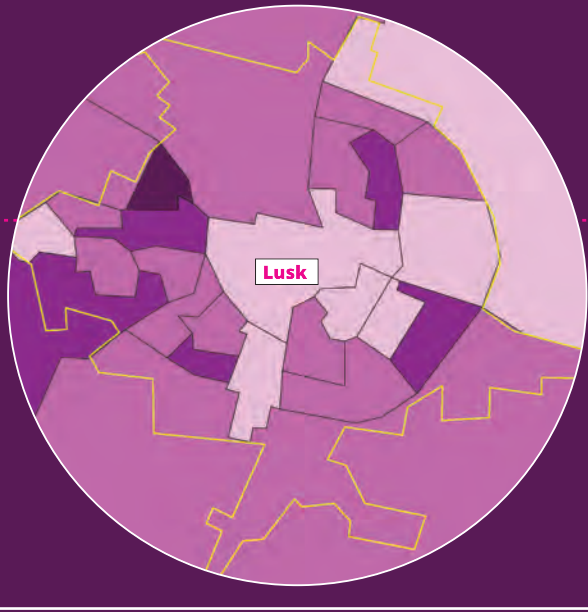


Education

Educational attainment is moderate with 8.9% having attained postgraduate education and a further 12.04% educated to higher undergraduate degree. However 40.4% achieved Leaving Certificate or less whilst another 34.4% were educated to Level 6.



Economic
and Travel



Employment

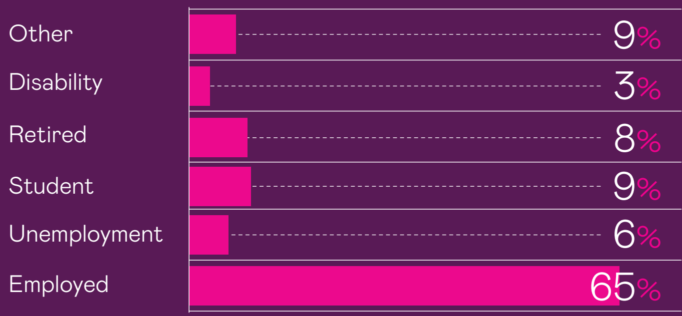
Lusk Settlement

Employment

0.5% - 4.2%
4.2% - 7.1%
7.1% - 10.7%
10.7% - 15.7%
15.7% - 24.8%

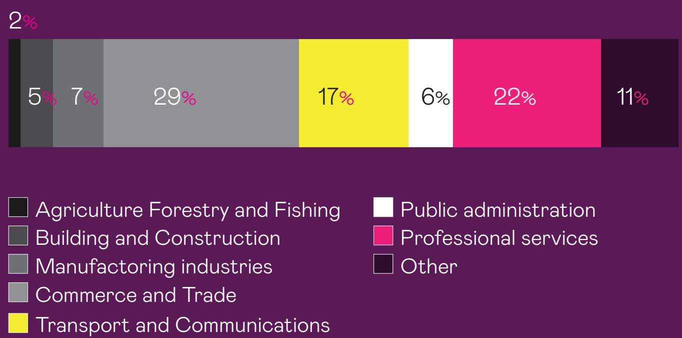
Principal economic status

Employment was moderate (65%), albeit gender disparity was evident (58.8% females in employment compared to 71.5% males and specifically 15.2% females looking after home/family compared to 1.1% males). Students and retired people equate to 9.4% and 7.8% which is reflective of the age profile.



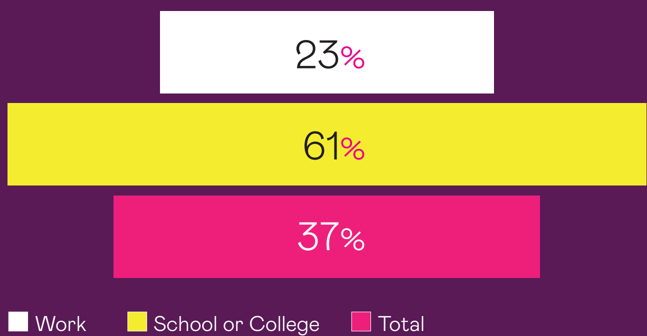
Industry of employment

Commerce and Trade is the most common industry (29.3%), followed by Professional Services (22.4%) and then Transport and Communication(16.5%). The least dominant industry is Agriculture, Forestry and Fishing, (1.9%), however this is relatively higher than other settlements.



Means of travel
to work and education

The most frequent mode of transport is by car, (55%), however this is dominated by employees (67%) rather than students (36%). Bus, minibus or coach is the most common form of public transport (11.6%) whilst 16.9% travel via foot. Specifically 38.3% of students commute on foot whilst 15% use bus.



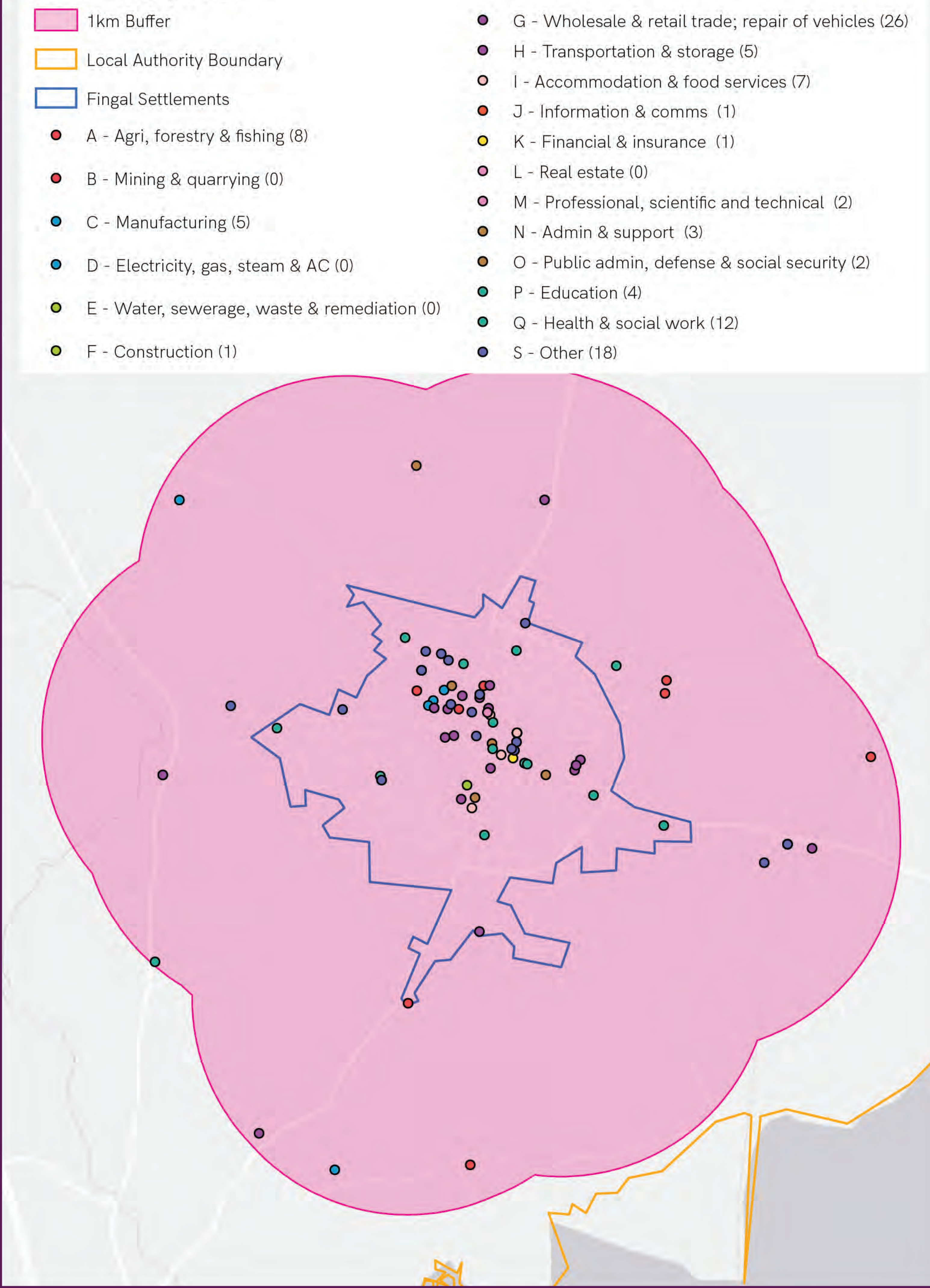
Commuting via active or public transport

Commercial properties

There are 73 businesses in Lusk (accounting for 1.0% of NACE coded businesses in Fingal) with a further 22 businesses within 1km of the settlement boundary.

Refer overleaf

Lusk Enterprises



5.1.9 - Rush

Overview of Rush

Rush had a population of 9,943 in 2016 which comprised 2,664 families and 3,231 total households.

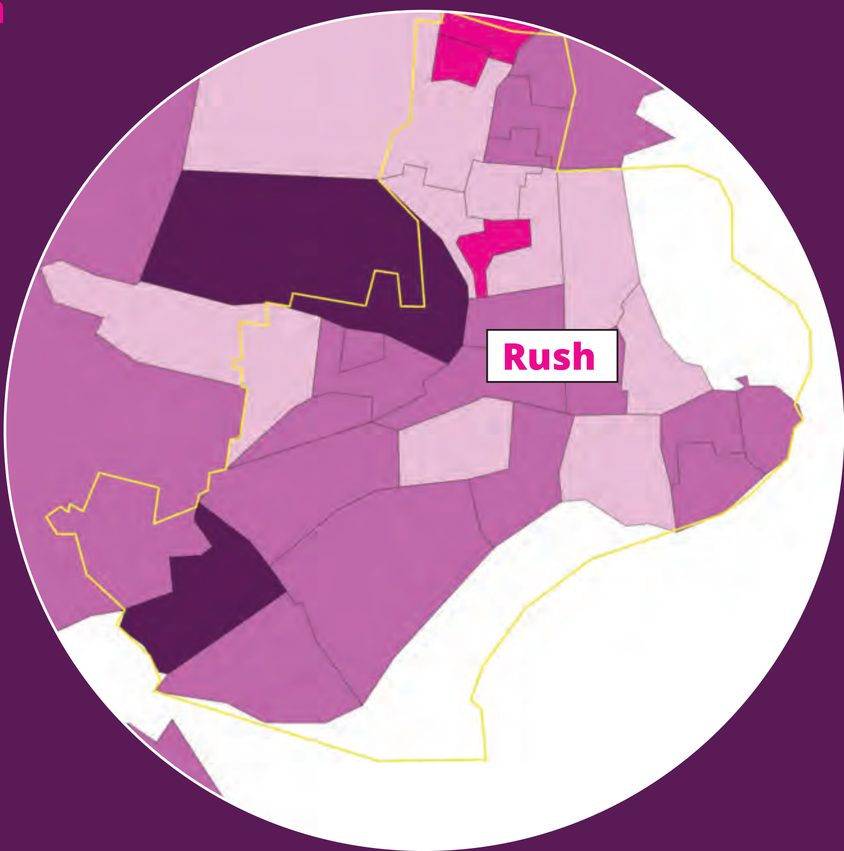
Rush Settlement

Population

700 - 2,700
6,200 - 11,300
2,700 - 6,200
11,300 - 19,000
19,000 - 39,000

Affluence and Deprivation

Slight affluence and disadvantage was generally evident in Rush. There were pockets of marginal affluence and deprivation evident across the settlement, with very affluent areas to the south west and west of the settlement.



Rush Settlement

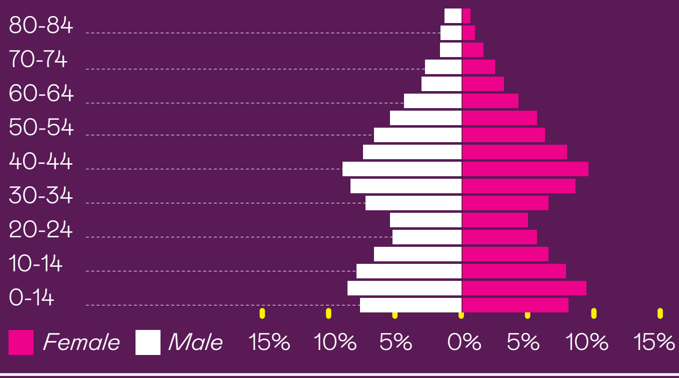
Pobal Index

Very Affluent
Affluent
Marginally above average
Marginally below average
Disadvantaged
Very disadvantaged

Social

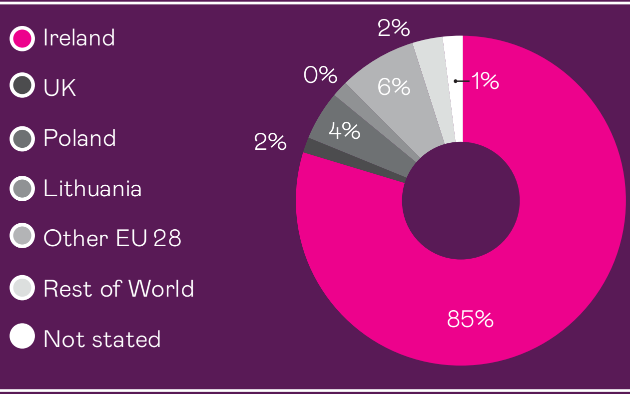
Age profile

The average age is 34.5 years which is relatively high in comparison to other settlements. Just 24.8% are under the age of 15 whilst 9.8% over 64 years.



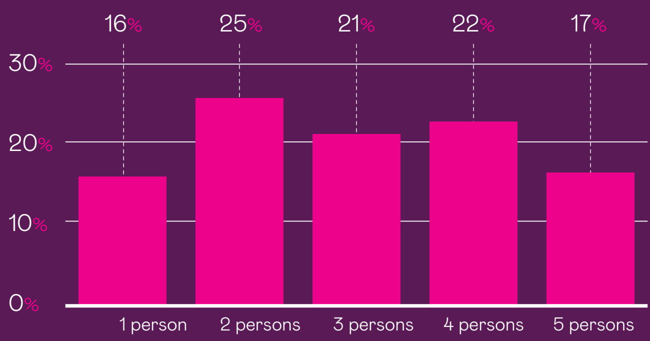
Nationality

It is apparent that Irish nationals are dominant in Rush being at 81.9% of the total population. Following in order is UK nationals (4.5%), Poland (3.8%) and lastly Lithuania (0.5%). 18.1% were born overseas and 14.7% identify as non-Irish nationals. The most common nationalities (other than Irish) are Polish (3.9%), British (1.5%) along with other EU countries (5.6%). Interestingly by birthplace, 4.5% were born in the UK.



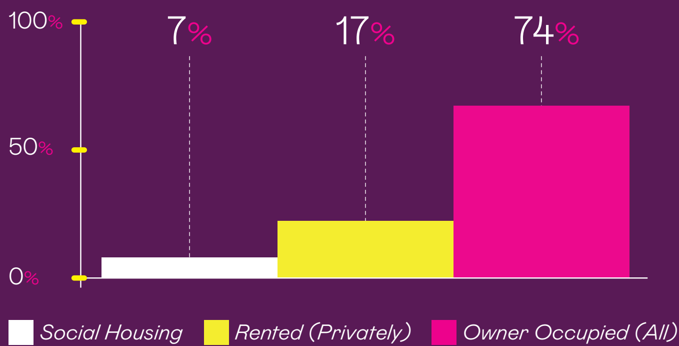
Household structure

The average household size is 3.08 with two person households the most common type (24.9%). Comparatively one person households are relatively uncommon and less than five person households overall.



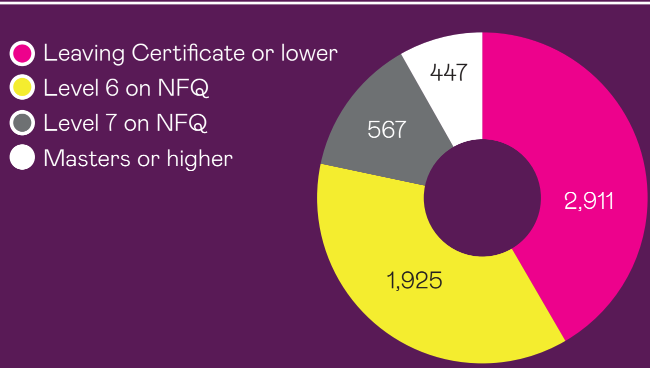
Tenure

Owner occupation leads tenure type (73.5%), followed by private rental (16.8%) and social housing (6.5%), of which 6.2% is rented from the local authority.

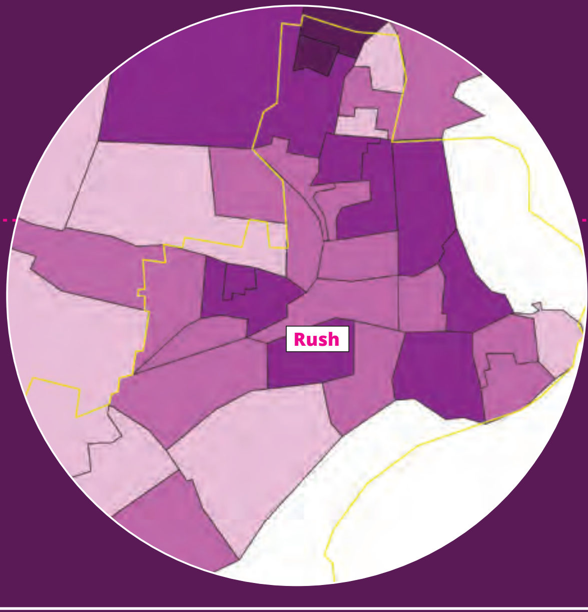


Education

Educational attainment is moderate with 7.3% having attained postgraduate education and 9.2% educated to higher undergraduate degree. 47.3% achieved Leaving Certificate or less whilst another 31.3% were educated to Level 6



Economic
and Travel



Employment

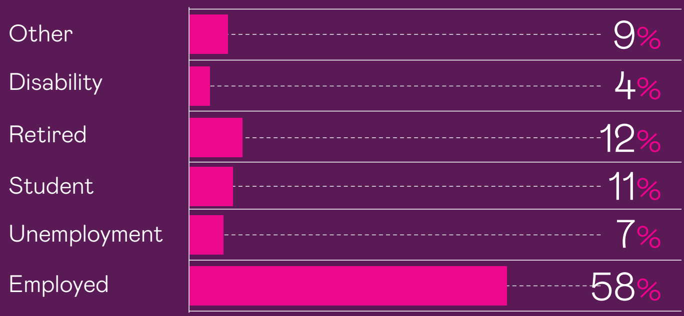
Rush Settlement

Employment

- 0.5% - 4.2%
- 4.2% - 7.1%
- 7.1% - 10.7%
- 10.7% - 15.7%
- 15.7% - 24.8%

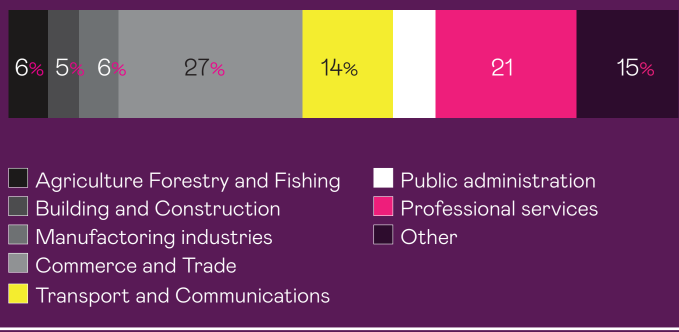
Principal economic status

Employment represents 57.7%, (although just 50.6% of females compared to 65.3% of males). There are comparable proportions of students and retirees, however females looking after home and family is notably high (17%) when compared to males (1%).



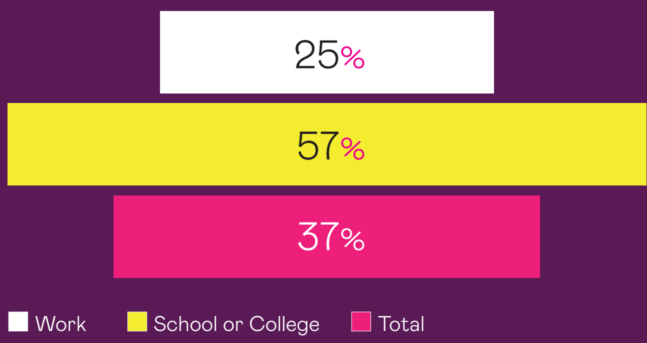
Industry of employment

Commerce and Trade is the main industry (27.1%), followed by Professional Services (20.9%) and then Transport and Communication (13.6%). The least dominant industry is Building and Construction (4.8%) whilst Agriculture, Forestry and Fishing is relatively high (6%).



Means of travel
to work and education

The most common form of transport is car (53%), however active transport (16.1%) and public transport (20.7%) are relatively high. Cars were used more to get to work (61%) than education (39%) whilst almost 28.8% of students commuted on foot. The most common mode of public transport is bus, minibus or coach (12.8%).

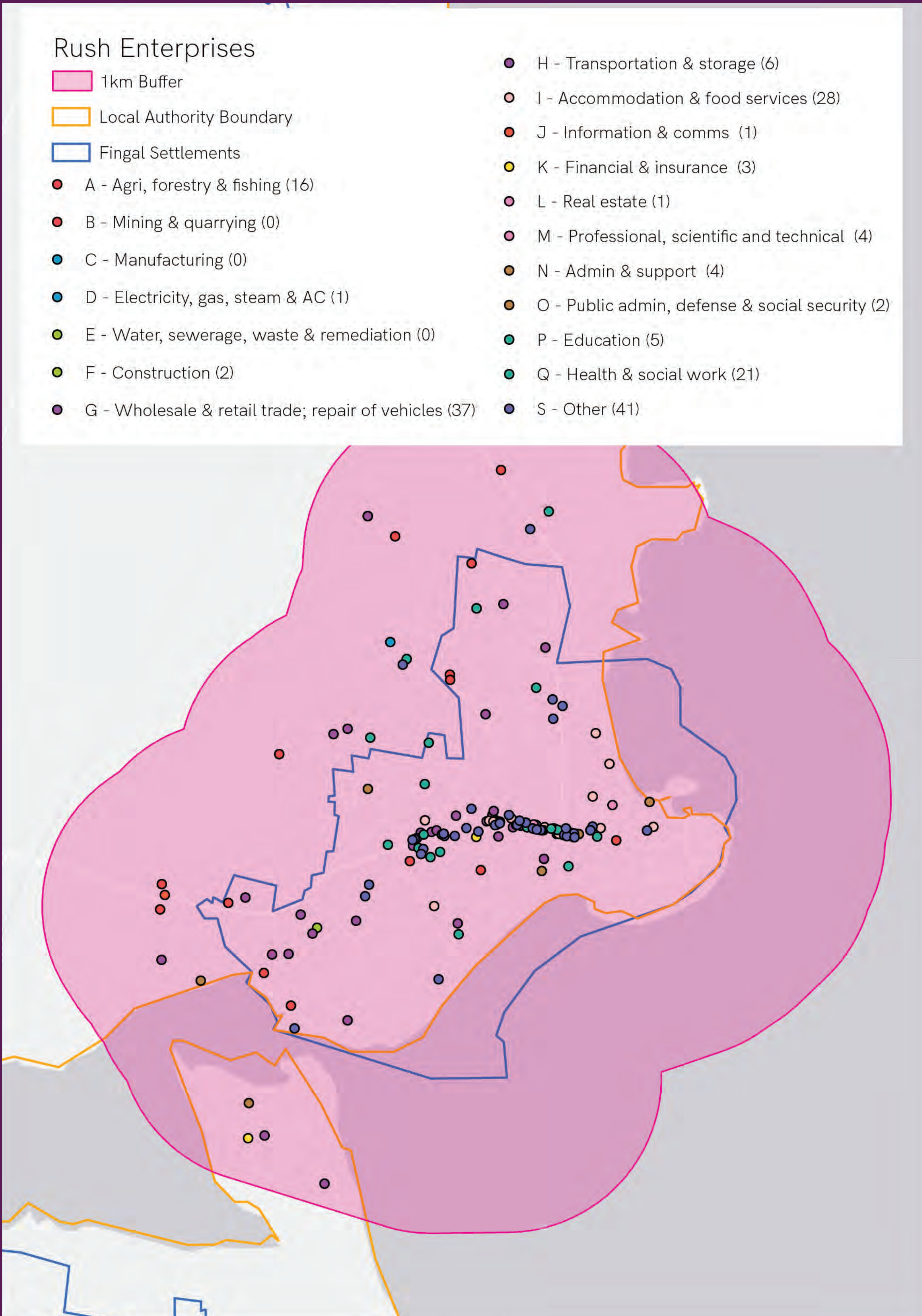


Commuting via active or public transport

Commercial properties

There are 146 businesses in Rush (accounting for 2.1% of NACE coded businesses in Fingal) with a further 26 businesses within 1km of the settlement boundary.

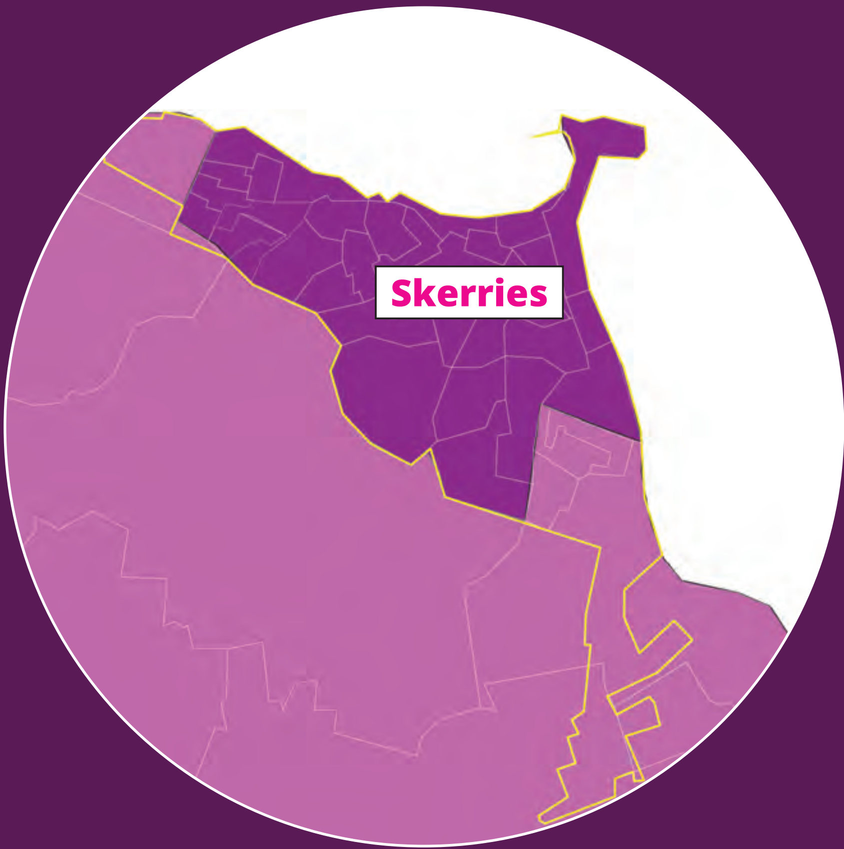
Refer overleaf


Rush Enterprises
1km Buffer
Local Authority Boundary
Fingal Settlements
A - Agri, forestry & fishing (16)
B - Mining & quarrying (0)
C - Manufacturing (0)
D - Electricity, gas, steam & AC (1)
E - Water, sewerage, waste & remediation (0)
F - Construction (2)
G - Wholesale & retail trade; repair of vehicles (37)
H - Transportation & storage (6)
I - Accommodation & food services (28)
J - Information & comms (1)
K - Financial & insurance (3)
L - Real estate (1)
M - Professional, scientific and technical (4)
N - Admin & support (4)
O - Public admin, defense & social security (2)
P - Education (5)
Q - Health & social work (21)
S - Other (41)

5.1.10 - Skerries

Overview of Skerries

Skerries had a population of 10,043 in 2016 which comprised 2,791 families and 3,523 total households.



Skerries Settlement

Population

700 - 2,700

6,200 - 11,300

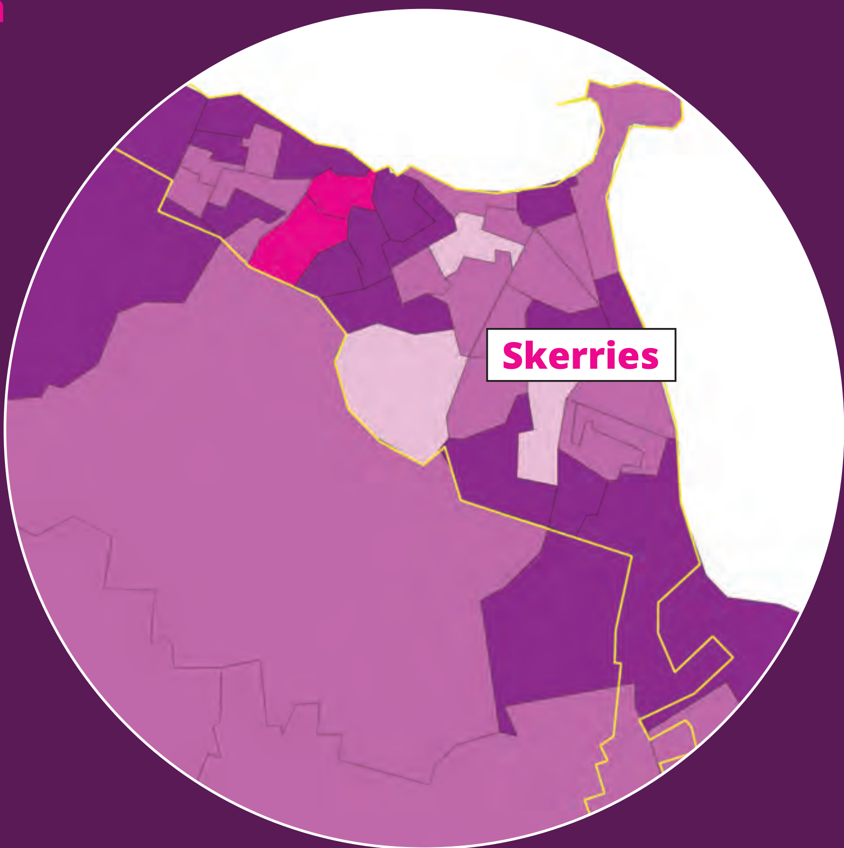
2,700 - 6,200

11,300 - 19,000

19,000 - 39,000

Affluence and **Deprivation**

Affluence (including marginal affluence) was generally evident across Skerries. There are pockets of disadvantage identified around Mourne Court and Mourne View.



Skerries Settlement

Pobal Index

Very Affluent

Affluent

Marginally above average

Marginally below average

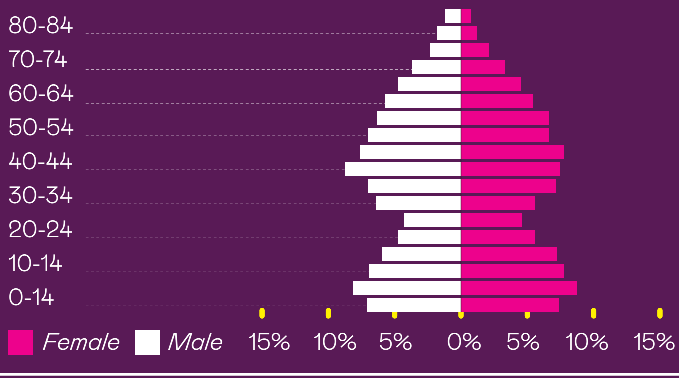
Disadvantaged

Very disadvantaged

Social

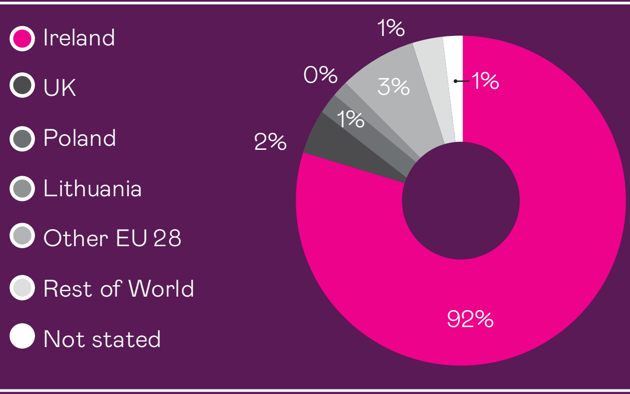
Age profile

The average age is relatively high (36.8 years) as 23.2% of the population are under 15 years whilst 12.9% are over the age 64. Gender difference was evident with the male average of 35.9 years whilst female was 37.7 years.



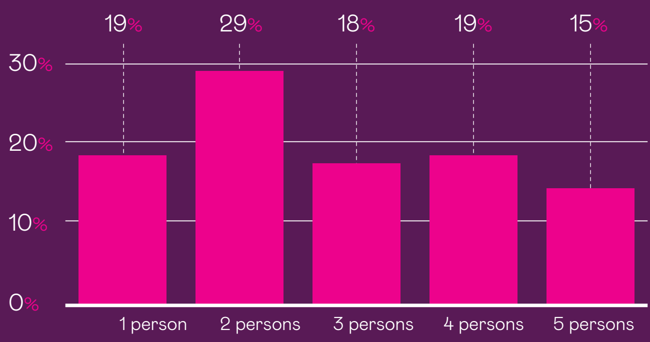
Nationality

Diversity was less evident when compared to other settlements as 13.96% were born overseas whilst 8.1% identified as a not being an Irish national. British is the second most common nationality (2.4%), followed by other EU (2.7%) and rest of the world (1.5%), despite the higher proportions born in those locations (6.4%, 3% and 3.8% respectively).



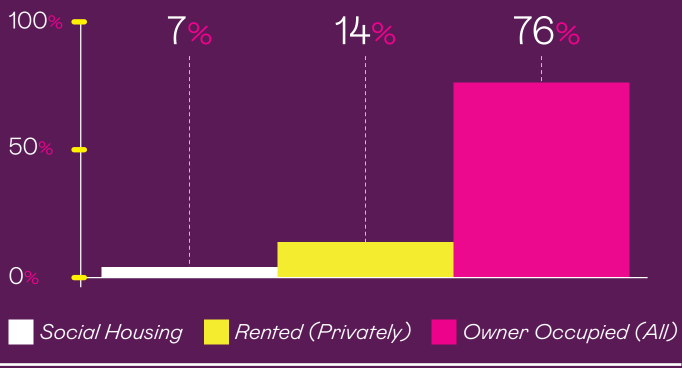
Household structure

The average household size is 2.88 and there is a clear outlier as two person households (29%) have a 10% or more increase over all other household types.



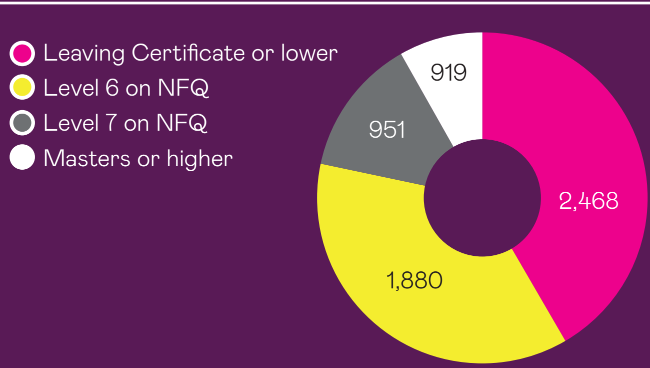
Tenure

Owner occupation is the most common tenure type followed by private rental. Of the 6.6% social housing, all is rented from the local authority.



Education

Educational attainment is relatively very high with 14.2% having attained postgraduate education and a further 14.7% educated to higher undergraduate degree. Another 29% were educated to Level 6.



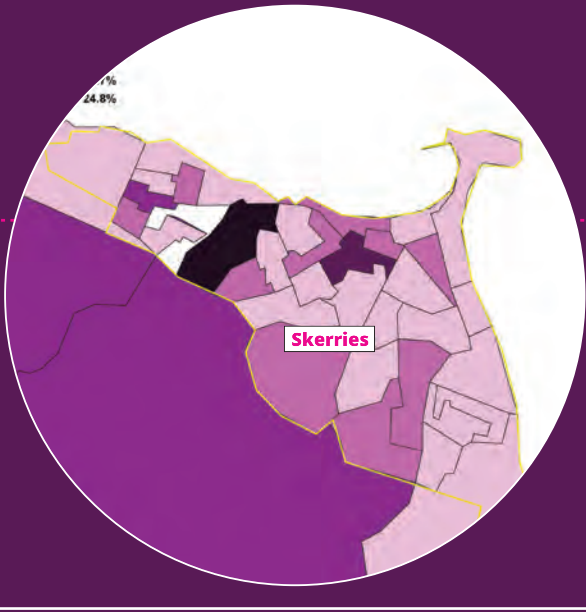
Economic
and Travel

Employment

Skerries Settlement

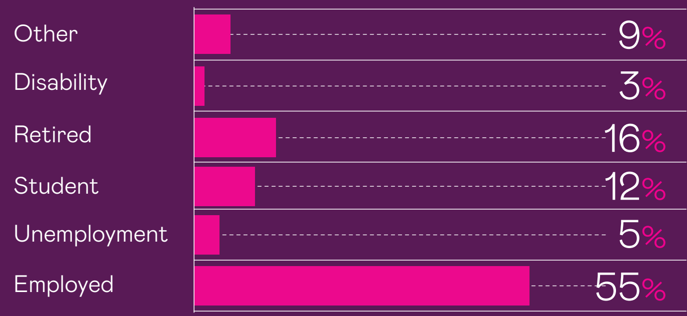
Employment

0.5% - 4.2%
7.1% - 10.7%
4.2% - 7.1%
10.7% - 15.7%
15.7% - 24.8%



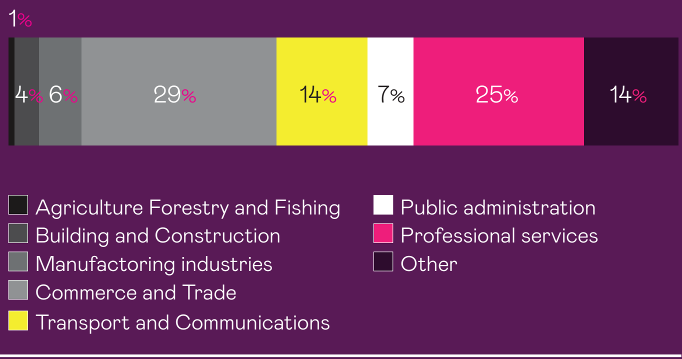
Principal economic status

Skerries has a very high percentage of retired people (16.4%) when compared to other settlements and 11.8% are students. 5.2% are unemployed whilst 54.5% are employed (59.7% of males and 49.8% of females).



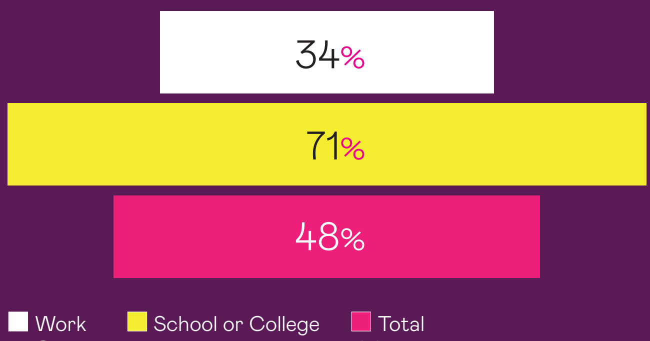
Industry of employment

Commerce and Trade is the main industry (29.2%), followed by Professional Services (25.3%) and then Transport and Communication(13.6%). The lowest employment percentage is Agriculture, Forestry and Fishing (only 0.5%).



Means of travel
to work and education

The most frequent mode of transport for commuting is by car (44% overall but 54% of employees and 27% to education). Active transport is more common than public transport (24.3% and 23.4% respectively) and specifically 48.3% of students travel on foot whilst 23.1% of employees use the railway line.

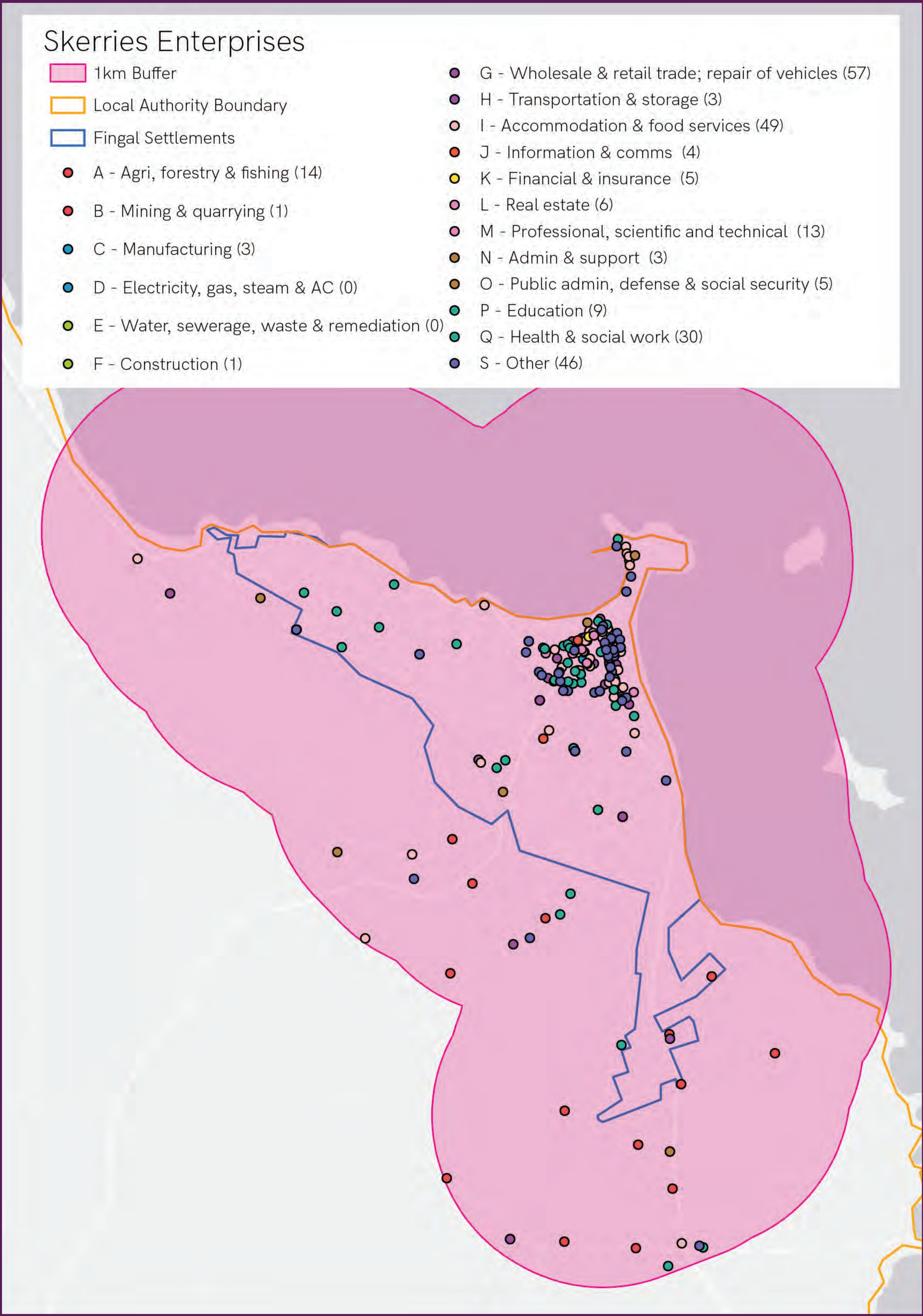


Commuting via active or public transport

Commercial properties

There are 218 businesses in Skerries (accounting for 3.1% of NACE coded businesses in Fingal) with a further 31 businesses within 1km of the settlement boundary.

Refer overleaf



Skerries Enterprises
1km Buffer
Local Authority Boundary
Fingal Settlements
A - Agri, forestry & fishing (14)
B - Mining & quarrying (1)
C - Manufacturing (3)
D - Electricity, gas, steam & AC (0)
E - Water, sewerage, waste & remediation (0)
F - Construction (1)
G - Wholesale & retail trade; repair of vehicles (57)
H - Transportation & storage (3)
I - Accommodation & food services (49)
J - Information & comms (4)
K - Financial & insurance (5)
L - Real estate (6)
M - Professional, scientific and technical (13)
N - Admin & support (3)
O - Public admin, defense & social security (5)
P - Education (9)
Q - Health & social work (30)
S - Other (46)

6 Summary

6 Summary

This socioeconomic baseline has been prepared in support of the ongoing preparation of the Fingal Development Plan 2023 – 2029 providing a quantitative analysis of social and economic indicators, travel trends and emerging trends in Fingal County Council.

6.1 Socioeconomic

The socioeconomic baseline detailed in Section 3 can be summarised below:

Social indicators

Fingal County Council was home to 296,020 people as of the latest Census in 2016 accounting for 22.0% of all Dublin County residents. The population has seen the most rapid growth of any Dublin local authority with 8% growth over the 2011-2016 intercensal period.

Fingal has the youngest population of any Dublin local authority with 24.5% of residents aged under 15 in comparison to the Dublin average of 19.3%, significantly more than any other Dublin local authority. The National Planning Framework Implementation Roadmap has identified an upper population target for Fingal of 349,000 by 2031 indicating total growth of +53,000 persons.

Fingal has the highest average household size of any local authority in Dublin at 3.03 persons per household. Fingal's household size is more evenly distributed in comparison to the state average with more numerous 3+ person households, indicative of family living. Nearly half (49.5%) of the resident population live in households categorised as 'married couple and children'. Fingal has the lowest proportion of single person households in Dublin at just 5.2%.

Fingal has a diverse population with a variety of nationalities and ethnicities in comparison to Dublin, the region and the State with 23.8% of the population defining their birthplace as outside of Ireland. The most common nationalities of non-Irish residents are Polish, British and Lithuanian.

The type of housing in Fingal is predominantly units associated with family living such as houses and bungalows which comprise 80.7% of all households. The majority of households in Fingal are owner occupied (67.6%) while 21.3% of households rent from a private landlord, 5.9% rent from a local authority and 0.8% rent from a voluntary body. 7.6% of the permanent dwellings in Fingal were vacant as of the latest census, down 17.5% since the 2011 census.

Fingal has significant variation in terms of affluence and deprivation. According to the Pobal Relative Affluence and Deprivation Index, Fingal is the 2nd most affluent County in Ireland with an average score of 5.3, second only to Dun Laoghaire Rathdown County Council with a score of 10.0. Fingal's relative index score has consistently grown with an increase of 0.49 and 0.19 across the 2006-2011 and 2011-2016 intercensal periods respectively. There is local variation however between local electoral areas with Mulhuddart and Balbriggan scored lower at 2.0 and 2.2 respectively, in contrast to Swords, Castleknock and Howth-Malahide LEA's scored at 6.1, 7.3 and 9.3 in turn. There is further variation at small area level highlighting those at risk of poverty.

The educational attainment in Fingal is higher than the state average, aligned with the regional average, and lower than the Dublin average. 29.6% of Fingal residents have achieved a Third Level (level 6) degree or certification. The primary fields of education are social sciences, business and law (19.6%) and engineering, manufacturing and construction (8.7%).

Economic Indicators

Fingal has the highest employment rate of the four Dublin local authorities as of the 2016 census (60%) with slightly lower unemployment, student, disability and retirement rates than the Dublin, regional and national average. There is minor gender disparity in terms of employment with 65.8% of males employed compared to 54.5% of females.

Generally managerial and technical, non-manual and skilled manual are the most dominant social classes in Fingal. The proportion of managerial and technical and non-manual is higher in Fingal than Dublin, the region and State whilst the proportion of those semi-skilled and unskilled is lower. The dominant industries of employment in Fingal are commerce and trade (27.6%), professional services (22.7%) and transport and communications (14.2%).

Approximately 6.9% of the population over 15 years in Fingal (or 15,415 people) were unemployed in April 2016 and this was generally lower than Dublin, the region and State. Unemployment has generally decreased in line with the regional and national trends as a result of the COVID-19 Pandemic as of 2020 which has been localised in analysis using the Live Register.

The rate of new business development in Dublin accelerated over the past decade with 16.4% growth in new businesses during 2014 – 2018. The main sectors that Dublin enterprises contribute to (by count) are professional, scientific and technical activities (15.7%), wholesale and retail (10.8%) and construction (10.8%). These three sectors account for 37.3% of all active enterprises in total in Dublin and they generally align with national figures.

6 Summary

Analysis of enterprise activity by NACE category (GeoDirectory 2020 Q4) indicates that the largest quantum of commercial properties by sector are:

- Wholesale and retail trade; repair of motor vehicles and motorcycles
- Accommodation and food service activities
- Human health and social work activities

Further key sectors identified include tourism, retail and hospitality, information technology and communications and agriculture. These are further detailed in the Fingal Land Use and Economic Study.

6.2 Travel Trends

The travel trends observed in Fingal as detailed in Section 4 can be summarised below:

Over 106,500 persons both live within Fingal and also work or attend education within Fingal whilst 76,000 persons leave Fingal for such purposes. In contrast, 52,000 people commute to Fingal. As a factor of the population within Fingal as recorded by POWSCAR who remain in the area (106,500), external commuters add an additional 49.1% to the workforce and those in education. Overall, there is a net loss of 23,800 people who work/commute outside of Fingal County Council.

Given the dominance of Dublin City Council in the travel trends, further analysis of the relationship indicates that whilst 57,000 of Fingal's residents commute to Dublin City, 22,700 of Dublin City's residents commute to Fingal. This results in a net loss of 34,300 for Fingal and it should be noted that is much lower than South Dublin and Dun Laoghaire-Rathdown combined (a net loss of 3,500 people).

The most significant impacts of COVID-19 on travel in Fingal are associated with the direct impact on Dublin Airport (with knock on impacts in the tourism and hospitality sectors) as well as the influence of travel restrictions on commuting patterns, congestion and public transport use due to the transition to working and education from home for many residents in Fingal. There has been a significant drop in public transport usage throughout 2020 and 2021.

The impacts of Brexit as they relate to travel trends are primarily relevant to the movement of people and goods with most significant impacts on travel associated with the direct impact on Dublin Airport as well as the influence on the movement of people and goods particularly across the Northern Irish border.

There are a range of forthcoming local infrastructure interventions as well as Strategic Infrastructure Developments with the potential to fundamentally alter travel within, to and from Fingal over the coming years. These developments primarily are MetroLink, DART+ and BusConnects in addition to myriad local infrastructure such as metropolitan cycle networks and cycleway improvements.

6.3 Conclusion

This report has been prepared by KPMG Future Analytics on behalf of Fingal County Council to support of the ongoing preparation of the Fingal Development Plan 2023 -2029. It provides desk-based quantitative analysis based on the published data and literature in relation to the social and economic indicators, travel trends and emerging trends in relation to the same over recent years. The report provides the results of an analytical and qualitative bespoke study utilising the best available data on socio-economic, demography and households, economic activity and employment, travel patterns and connectivity.

The evidence presented herein demonstrates the overarching influence of the more populous areas, particularly the Dublin City Consolidation Area and larger settlements such as Swords, Portmarnock, Balbriggan, Malahide and Skerries in relation to socioeconomics and travel trends. Further, the emerging trends have been reflected upon in the context of the socioeconomic situation and travel trends.

Population growth is forecasted over the coming years and policy demonstrates the ambitions for compact growth, strengthened rural economies and communities. Specifically the target of at least 40% of all new housing to be delivered within the existing built-up areas of cities, towns and villages on infill and/or brownfield sites whilst the rest will continue to be delivered at the edge of settlements and in rural areas as set out in the National Planning Framework.

The forthcoming Fingal Development Plan 2023 -2029 be cognisant of the existing trends and broader planning policy framework in order to help make Fingal the place to live, work, visit and do business.