JOINING UP THE DOTS

APRIL 2020

Grangegorman
Development Agency
Gníomhaireacht Forbartha
Ghráinseach Ghormáin

A Socio-Economic and Demographic Profile of
DUBLIN'S NORTH WEST INNER CITY

#3

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OLLSCOIL TEICNEOLAÍOCHTA BHAILE ÁTHA CLIATH
DUBLIN
TECHNOLOGICAL UNIVERSITY DUBLIN

GRANGEGORMAN
Labour & Learning Forum

HSE
Feidhmeannacht na Seirbhíse Sláinte
Health Service Executive

April 2020

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A Socio-Economic and Demographic Profile of
DUBLIN'S NORTH WEST INNER CITY
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Joining up the Dots - #3

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PREPARED AND DESIGNED BY:
Future Analytics Consulting

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A Socio-Economic and Demographic Profile of
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ABBREVIATIONS

ABP	An Bord Pleanála
CSO	Central Statistics Office
DCC	Dublin City Council
ED	Electoral Division
GDA	Grangegorman Development Agency
GLLF	Grangegorman Labour and Learning Forum
HSE	Health Service Executive
NEIC	North East Inner City
NFQ	National Framework of Qualifications
NWIC	North West Inner City
SA	Small Area
SDZ	Strategic Development Zone
TU Dublin	Technological University Dublin

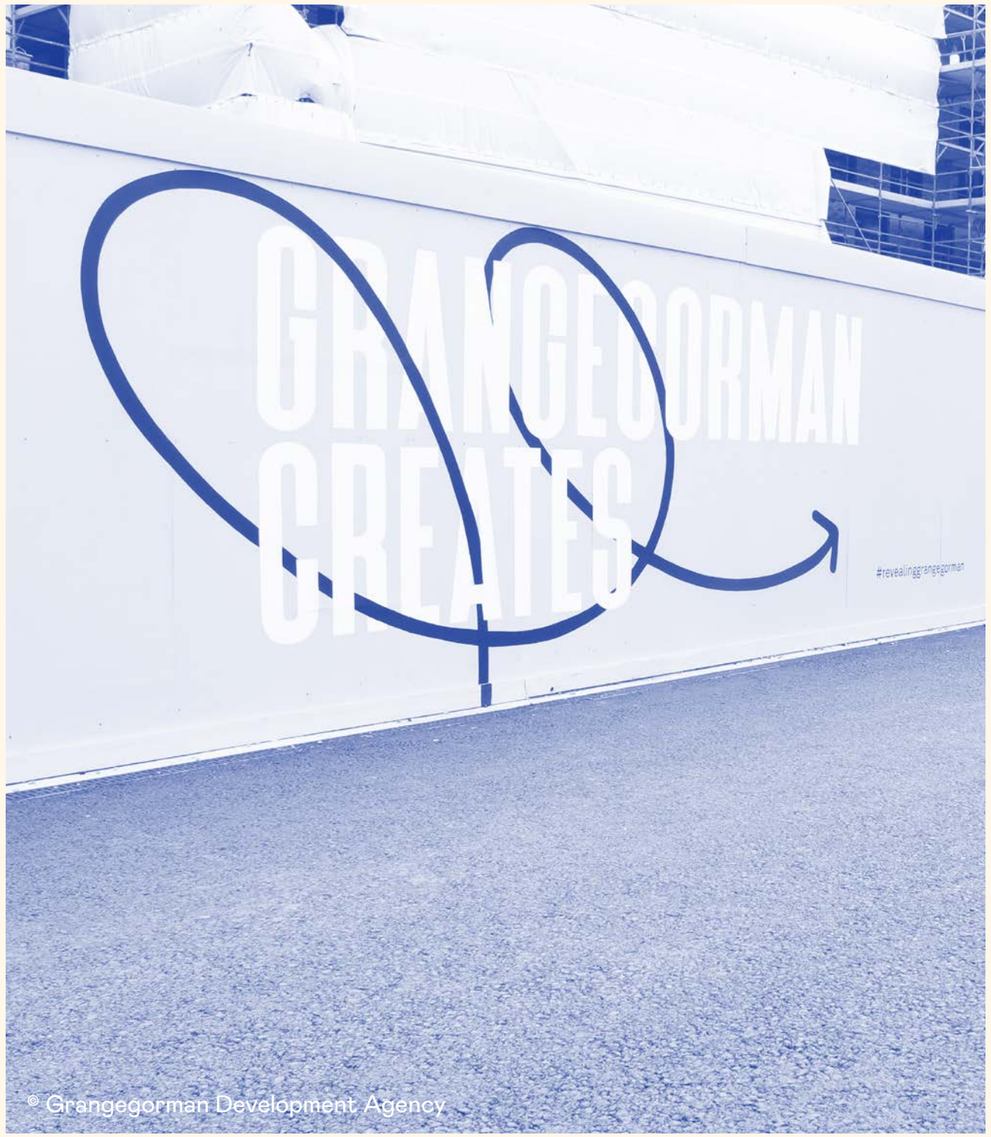
ACKNOWLEDGEMENTS

The Grangegorman Labour and Learning Forum (GLLF) is a voluntary group made up of representatives from a range of statutory, community and voluntary organisations and stakeholders working within the North West Inner City of Dublin. The key aim of the GLLF is to ensure that local communities benefit from Grangegorman in terms of education and training, employment opportunities, business and enterprise. The GLLF Chairperson is Dr Noel O'Connor, Director of Student Development at TU Dublin (formerly Dublin Institute of Technology - DIT).

Current members of the GLLF and its sub-groups include:

Grangegorman Development Agency	**(GDA)**
Technological University Dublin	**(TU Dublin)**
Health Service Executive	**(HSE)**
City of Dublin Education and Training Board	**(CDETB)**
Daughters of Charity Community Services	**(DOCCS)**
Department of Employment Affairs and Social Protection/Intreo	
Dublin Chamber of Commerce	
Dublin City Council	**(DCC)**
Dublin North West Area Partnership	**(DNWAP)**
Inner City Enterprise	**(ICE)**
Innovate Dublin	
Irish Prison Service and Probation Service	
Mount Carmel Secondary School	
North West Inner City Network	**(NWICN)**
Spade Enterprise Centre	
Smithfield and Stoneybatter Business Association	**(SSBA)**

As part of the Grangegorman Development Agency's (GDA) commitment to ensuring that local communities have access to any employment that may arise from the development, the GDA worked with the GLLF to develop the Grangegorman Employment Charter. The Charter sets out requirements and targets for Grangegorman contractors in respect of local employment.



Executive Summary

The Grangegorman Labour and Learning Forum (GLLF) commissioned a study to assess the socio-economic and demographic characteristics of the area in Dublin's North West Inner City known as Grangegorman (as seen in Figure 2). The Study Area, as set out in the Grangegorman Development Agency Act of 2005, delineates an area of eight Electoral Divisions (ED) where social, demographic, employment and education attributes and change are periodically reported on and monitored by the Grangegorman Development Agency (GDA). For comparative analysis to the Study Area, data from the North East Inner City (NEIC) was also evaluated. This report, constitutes the third revision in a series of reports sets out the various elements of socio-economic, demographic, employment and education data as captured by the Central Statistics Office (CSO) in the Census of 2011 and 2016, supported by locally generated information from the GDA and assessment of publicly available spatial datasets.

This report provides analysis and evaluation of key data applicable to the Study Area, and considers the change over time between relevant data sets. The following key findings have been highlighted:

Population

Population has increased significantly between the intercensal periods of 2011 and 2016.

Growth from 2006 to 2011 was 4.1%, followed by a 7% increase in population between 2011 and 2016. The 2016 population was 27,332 people.

Population growth in the NEIC was higher at 11% from 2011 to 2016 (45,816 total population).

53% of the population are aged between 20-39 years and the proportion between 25-29 years (17.4%) is the largest age cohort in 2016.

Largest growth was recorded in the 40-49 age bracket (20% growth during 2011 and 2016).

The number of male and female between 20-24 years significantly declined (13% and 6% respectively).

The proportion of the population over 55 years increased by 11% during 2011 and 2016).

Ethnicity

The population was mostly Irish nationals (63%), with Caucasian Irish the most prevalent ethnicity (54%).

The number of people born overseas and residing in the Study Area increased by 3% between 2011 and 2016 to 34% (i.e. 8,769 people).

The most common origin of those persons was ‘Other EU’ states (excluding Poland and Lithuania) and the ‘Rest of the World’ (both 14% of the total population).

Households

The number of households only increased by 1% during 2011 – 2016, which resulted in an increase in average household size to 2.22 (as the population increased by 7% as previously noted).

The most prominent household compositions consisted of ‘one person’ households (33% of total households) and ‘two or more non-related person’ households (18% of total households), with a 29% increase in the latter.

Lone parent households made up 10% of 2016 number of households, which equates to a 15% decrease from 2011.

Education

The number of people with their highest level of qualification at ‘primary or lower’ decreased, compared to the increase in ‘up to leaving certification’ and ‘third or higher level’ qualifications achieved.

12% increase in female and 11% increase in males leaving school at the age of 20 and older.

Employment

Unemployment decreased by 30% from 2011 to 2016, with people ‘at work’ increasing by 23.34% in the same period.

Female employment increased by 4.4% (2.2% decrease in unemployment), whilst male employment increased by 10.7% (7.3% decrease in unemployment).

The economically active population increased by 11% (which includes people at work, looking for their first regular job and unemployed people having lost or given up their previous job).

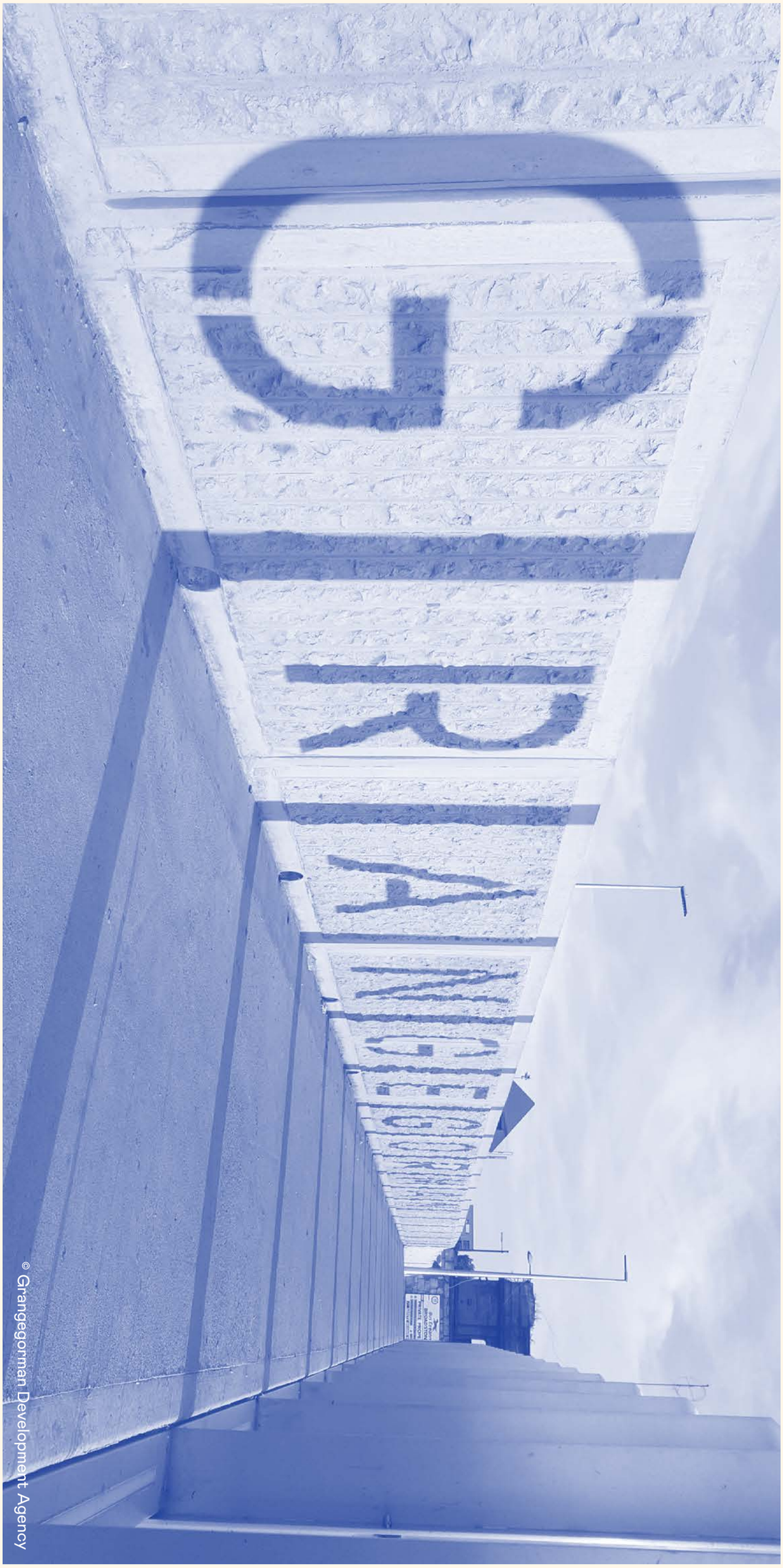
9% unemployment was evident with the working age population (aged 15 years and older) of the Study Area in 2016.

The Grangegorman Employment Charter has consistently promoted the employment of local people during the construction phase of the Grangegorman Development (and more recently in its operational phase). On average, 12% of total construction workers on site between 2015 and 2019 were appointed via the Grangegorman Employment Charter.

‘Managerial and technical’ workers account for 23% of the labour force.

The largest gender splits occur in the skilled manual labour (which has 12% males) and non-manual employment social classes (which has 16% females)

The ‘commerce and trade’ and ‘professional services’ industries remained the largest industries of employment, although ‘other’ industries showed the largest growth of 5% to a total of 30%.



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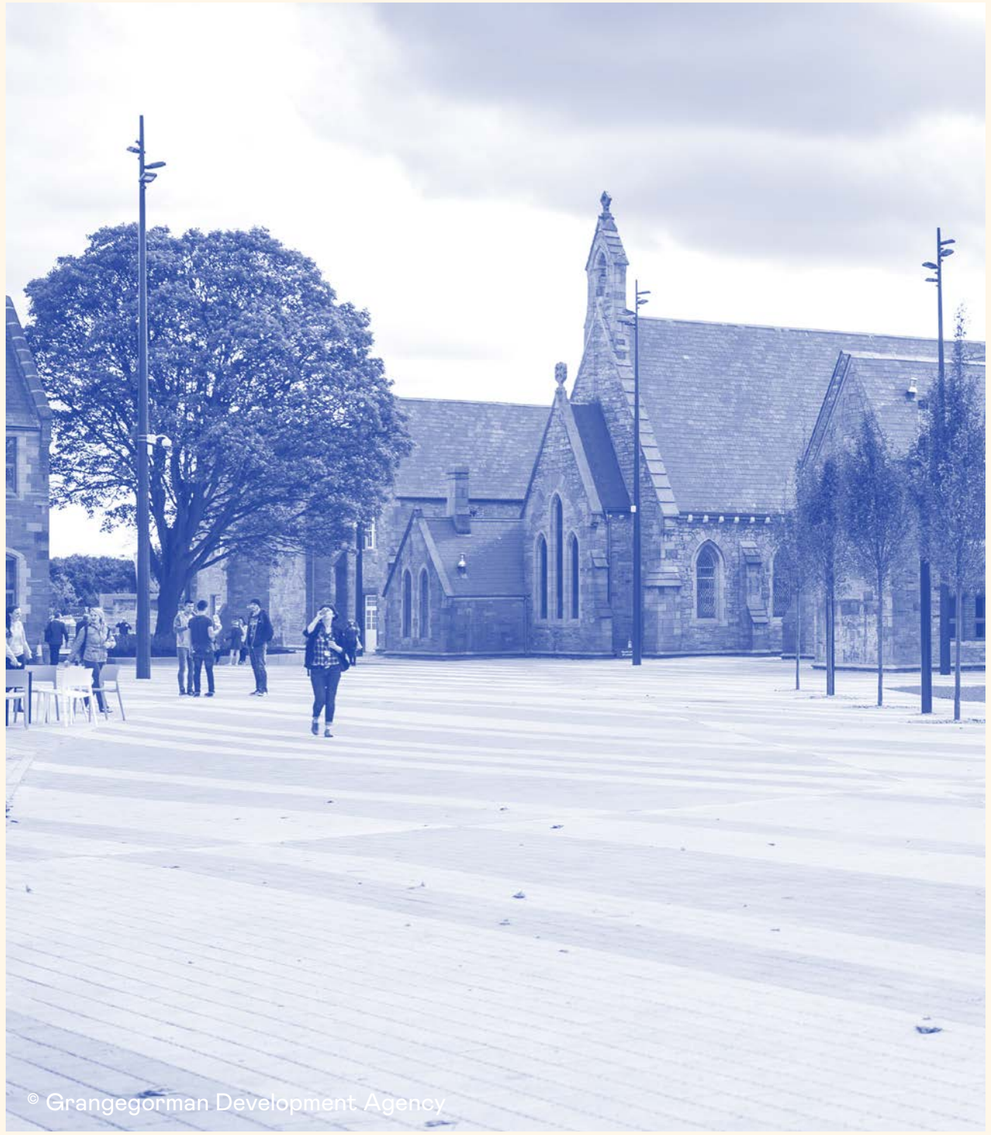
Joining up the Dots - #3

Introduction

“ ...Joining up the Dots 3, is the third iteration in the ‘Joining up the Dots’ series of reports that assess the socio-economic, demographic and employment data relating to development within a Study Area... ”



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This report, Joining up the Dots 3, is the third iteration in the 'Joining up the Dots' series of reports that assess the socio-economic, demographic and employment data relating to development within a Study Area defined by the Grangegorman Development Agency Act 2005.

The Joining Up the Dots 3 – A Socio-Economic and Demographic Profile of Dublin's North West Inner City is the third iteration that follows the 2009 and 2013 reports. This report provides an update to assist the Grangegorman Labour and Learning Forum (GLLF) in decision making regarding the development of employment and educational opportunities in the Grangegorman and surrounding areas.

Joining up the Dots - #3

The Study Area

The Study Area is situated in the north western part of Dublin city, north of the River Liffey in close proximity to Phoenix Park and the city centre (both within 1km).

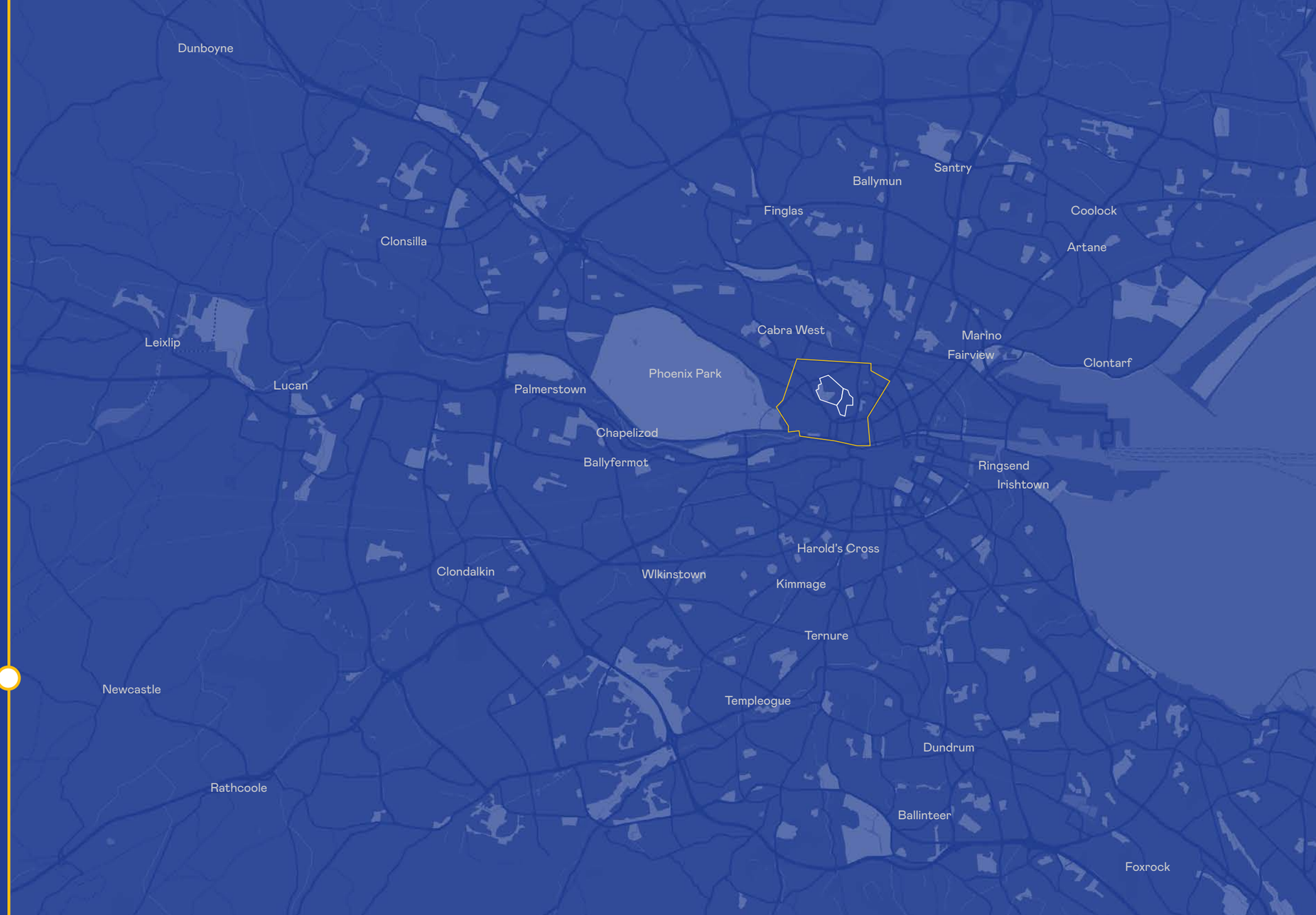

Figure 1: Study Area in Dublin Context

Map Legend

- Grangegorman Campus
- Study Area

The Study Area consists of eight Electoral Divisions (EDs) that form part of the Cabra, Grangegorman, Broadstone, Stoneybatter and Smithfield neighbourhoods in Dublin's northside. The eight EDs of the Study Area, as displayed in the figure below, are situated between the River Liffey to the south, North Circular Road / Cabra Road to the north, Dorset Street / Capel Street to the east and the old railway line to the west.

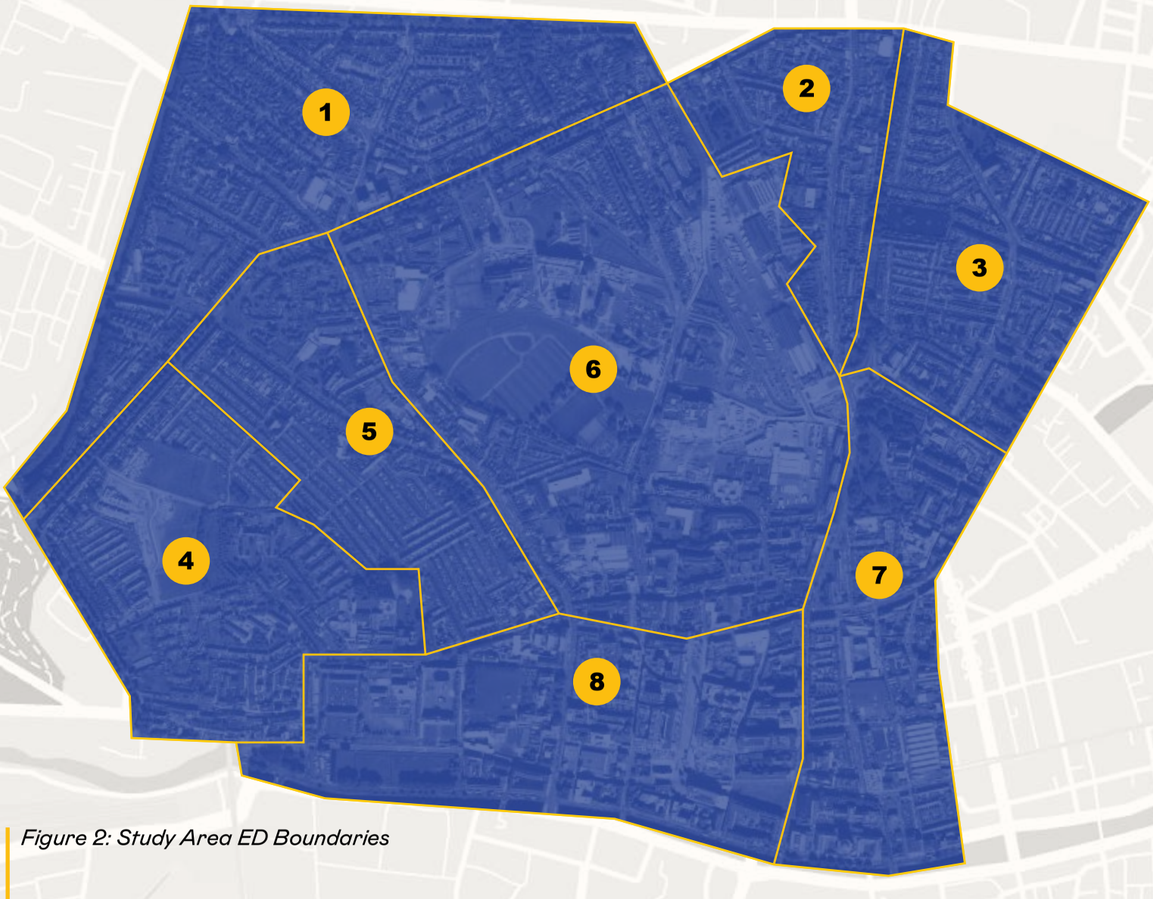

Figure 2: Study Area ED Boundaries

1 CABRA EAST C	3 INNS QUAY B	5 ARRAN QUAY E	7 INNIS QUAY C
2 ARRAN QUAY A	4 ARRAN QUAY D	6 ARRAN QUAY B	8 ARRAN QUAY C

The Study Area is closely aligned with the North West Inner City (NWIC) delineation of the Dublin Region, which includes seven of the eight EDs of the Study Area (with the exception of Cabra East C). For the purposes of the study, the North East Inner City (NEIC) (also known as North Inner City) area of Dublin is analysed alongside the NWIC. The NEIC comprises of 11 EDs to the northern part of the River Liffey and east of Dorset Street Upper, to the Dublin Port in the west. Being adjacent to the NWIC (and the Grangegorman development area) and sharing multiple local characteristics, the NEIC provides a benchmark for comparison with the Study Area to contextualise data and analysis results. Figure 3 shows the Study Area in context to the NWIC and NEIC areas.

1	DRUMCONDRA SOUTH B
2	BALLYBOUGH B
3	MOUNTJOY B
4	ROTUNDA A
5	ROTUNDA B

6	NORTH CITY
7	BALLYBOUGH A
8	MOUNTJOY A
9	NORTH DOCK A
10	NORTH DOCK C
11	NORTH DOCK B

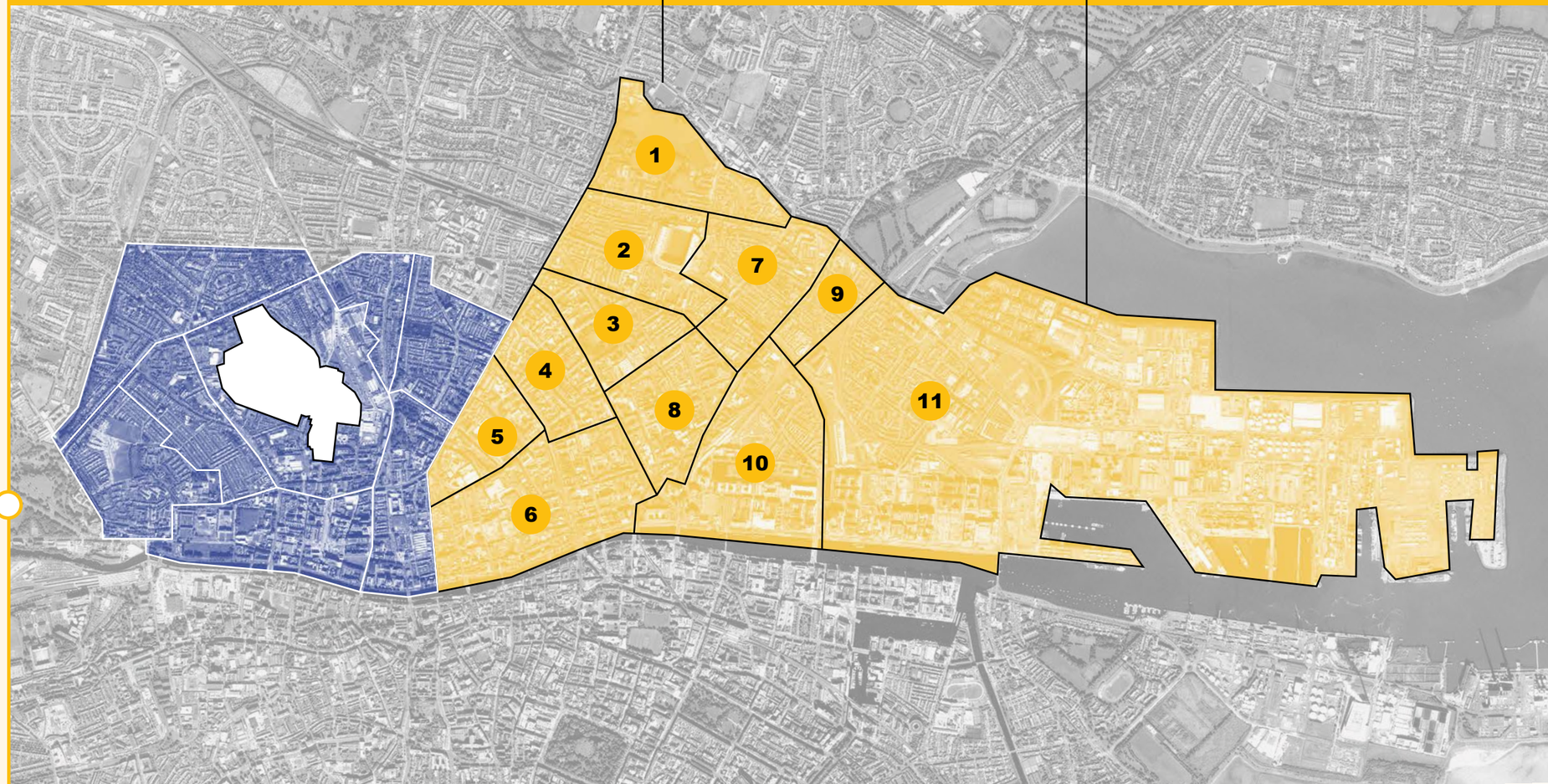

Figure 3: Study Area, NWIC and NEIC Areas

Map Legend

Campus

Grangegorman EDs

North East Inner City EDs

Within the Study Area, the landmark of the former St Brendan's Hospital and hospital grounds, together with a number of other Health Service Executive (HSE) properties and the former Dublin City Council Cleansing Depot, were originally identified as the Grangegorman Strategic Development Zone (SDZ) in the Dublin City Development Plan 2011-2017 (in accordance with the relevant planning policy – i.e. the National Spatial Strategy 2002-2020 and the Regional Planning Guidelines for the Greater Dublin Area 2010-2022). Figure 4 shows the SDZ within context of the larger Study Area.

The Irish Government, through the Grangegorman Development Agency Act 2005, established the GDA, who have been tasked to redevelop the Grangegorman site as defined in the Act for a diverse range of uses in a way that is sensitive to the context of the existing neighbourhoods. The site was designed to accommodate a new Dublin Institute of Technology (DIT) campus (DIT is now part of Technological University Dublin – TU Dublin), primary, social and mental health care facilities for the Health Service Executive (HSE), an Educate Together Primary School, as well as multiple recreational and public spaces. The large campus development is located within the Arran Quay B ED and is designed to provide a centralised location for education, healthcare and important community facilities, connecting the site into the surrounding neighbourhoods and wider city.

The campus development will provide new facilities for the former DIT (now part of TU Dublin), bringing students and staff from sites across the city into one location. Some of the key former DIT facilities that will move to the new TU Dublin Grangegorman campus include Kevin Street (College of Sciences and Health), Cathal Brugha Street (College of Arts and Tourism), Aungier Street (College of Business), Chatham Row and Rathmines (Conservatoire of Music and Drama). The TU Dublin Grangegorman campus when completed will accommodate approximately 20,000 students. Facilities and buildings of the HSE on site which have been fragmented and dilapidated are being upgraded and extended to provide a range of health services on site for children and families, older people, the disabled, people who are socially disadvantaged, and those suffering from mental illness. A brand new, state-of-the-art replacement care facility for people suffering from mental health issues – the Phoenix Care Centre – was developed, and the Primary Care Centre (one of the five largest in the country), which includes the National Hearing Aid Repair Centre.

Apart from the TU Dublin, HSE facilities, and Educate Together Primary School, the 29-hectare (73 acres) SDZ also features public open space and recreational facilities open for use by TU Dublin and the wider community. The campus design includes multiple landscaped gardens, quadrangles, play areas, and walkways connecting the various facilities in the campus, but also open for public enjoyment. Sports facilities at Grangegorman have been developed as a resource for TU Dublin and the community, and include a GAA pitch, football pitch, hockey fields and tennis courts.
The Study Area is highly accessible via multiple public transport modes and the campus is relatively well located in terms of

Figure 4: TU Dublin Campus within the Study Area

proximity to Dublin's city centre and associated transport hubs. For example, O'Connell Street Upper and Temple Bar are within walking distance and there are multiple bus, light rail and railway options within and adjacent to the Campus (i.e. within 15 – 20 minutes walking time as measured from GDA Head Office in The Clock Tower, Grangegorman Lower).

Prior to the redevelopment of the SDZ, the accessibility and permeability of the Campus was relatively restricted by boundary walls and surrounding land restrictions. However, the redevelopment of the site has incorporated multiple access points along the site boundary thereby increasing permeability across the Study Area. Accessibility of the Campus and the wider Study Area has also improved through sustainable transport infrastructure via on-campus pedestrianization and the provision of cycle routes along with off-campus public transport infrastructure improvements. There are multiple bus stops (particularly along the corridors of North Circular Road, Prussia Street, Cabra Road, and Church Street/ Constitution Hill) and Luas services within and around the Campus. The Luas Cross City development which began operating in December 2017, extended towards Broombridge and thus added two stops in the Study Area - Broadstone DIT and Grangegorman. Additionally, the Luas Red Line stops at Museum, Smithfield and Four Courts and proximity to Heuston Station also contributes to the accessibility of the Study Area.


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Data Analysis

“ ...a series of datasets were examined and modelled to determine the key insights into the social, demographic, economic and employment characteristics of the Study Area... ”

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In the analysis of the Study Area, a series of datasets were examined and modelled to determine the key insights into the social, demographic, economic and employment characteristics of the Study Area. The datasets examined are described in more detail in this section.

Central Statistics Office Census Data

Census data released by the Central Statistics Office (CSO) was used to analyse the socio-economic and demographic attributes of the Study Area as recorded by the Census. Data from the 2006, 2011 and 2016 Censuses were used to identify and highlight change in the social fabric of the Study Area over time. All data was sourced directly from the CSO and then modelled and reproduced according to project requirements.

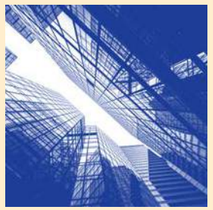
Census data[1] from 2006, 2011 and 2016 on the following topics were analysed:

Population

Education

Households

Workplace data



Principal economic status

Employment distribution (industry)

Employment distribution (occupation type)

1. CSO data available at: https://www.cso.ie/en/statistics/

Planning Applications and Permissions

The data on planning applications and permissions was sourced from An Bord Pleanála[2] (ABP) and the Dublin City Council[3] (DCC) web portals. The web portals provide spatial data for planning applications for residential and commercial building development for specific sites in Dublin (excluding Strategic Infrastructure Development). Inspecting the various proposed and granted applications provides a sense of the expected and potential change to the composition and certain characteristics of the area. Such development proposals can change the dynamic of how and for what purpose areas are used, which would influence future characteristics and change in the area. This report provides a qualitative summary and assessment of different residential and commercial planning applications and granted developments (from 2015 to 2020), and its potential influences on the Study Area.

2. ABP data available at: http://www.pleanala.ie/shd/applications/index.htm
3. DCC data available at: http://www.dublincity.ie/main-menu-services-planning/find-planning-application

Workplace Zones

The workplace zones and daytime population statistics were first published as part of 2016 Census. This dataset records people who indicated they worked, studied, or are at home (not working or studying) during the day within a particular area. As the 2016 dataset is currently the only workplace zone dataset available, it is used in this report to provide a snapshot of the daytime demographic and employment profile of the Study Area. The dataset provides information regarding the age, socio-economic group, nationality, education, travelling and employment of the people present in the Study Area during the day (i.e. the working population).

General rules for the creation of workplace zones are:

- Where possible all zones to have a range of between 100 to 400 workers
- Each workplace zone contains a minimum of three workplaces
- Workplace zones nest within county boundaries
- No more than 90% of employees in any one workplace zone can work in one organisation

Social Infrastructure

> PHYSICAL FACILITIES AND SPACES WHERE THE COMMUNITY CAN ACCESS SOCIAL SERVICES

Social infrastructure is defined by the European Association of Long Term Investors as a subcategory of infrastructure that are seen as physical assets in the social sector that provides personal (individual/household) benefits and community benefits that increase social cohesion. Social infrastructure can include, inter alia, facilities for education, health and human care, and accessible housing (Fransen, 2018). Social infrastructure can thus include a wide range of services that contribute to a population's quality of life with the potential positive spillover on economic activities.

For the purpose and relevance of this study, social infrastructure has been categorised as follows:

> Social infrastructure

- Primary schools
- Secondary schools
- College or place of further education
- University
- Community sports facilities
- Childcare facilities
- Garda station
- Fire station
- Hospital or clinic
- General practitioners

These facilities were mapped and evaluated in context of the area and what is provided to the residents within the Study Area.

Pobal Haase Pratschke (HP) Deprivation Index

The Pobal HP Deprivation Index uses several Census datasets to measure relative affluence or disadvantage within a particular geographical area. The Index provides a rating score and descriptive index on the standard of affluence or deprivation at Small Area (SA) level, looking at key indicators such as the proportion of skilled professionals, education levels, employment levels, and single-parent households found within that area. The Index has been displayed through geographical maps, with colour shading of the map is based on the level of deprivation, which ranges from Extremely Affluent to Extremely Disadvantaged according to the Pobal HP Deprivation Score of each SA. The Relative HP Deprivation Scores shows the position of any given SA relative to all other SAs in the country and is based on the 2016 Census data. The use of the relative index therefore shows how the performance of a SA relates to all other SAs at that point in time (i.e. 2016).

Spatial Level of Data Analysis

To ensure the analysis for this third iteration of Joining Up the Dots is in line with the previous iterations, data for the Study Area is extracted, modelled and analysed at ED level (and SA where appropriate). To provide context and comparison, data for Dublin City and the NEIC region is analysed in parallel. Visual representations are therefore provided at ED or SA level, depending on the content and appropriateness of the representation.

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The Relative HP Deprivation Scores shows the position of any given SA relative to all other SAs in the country and is based on the 2016 Census data.

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Community Profile

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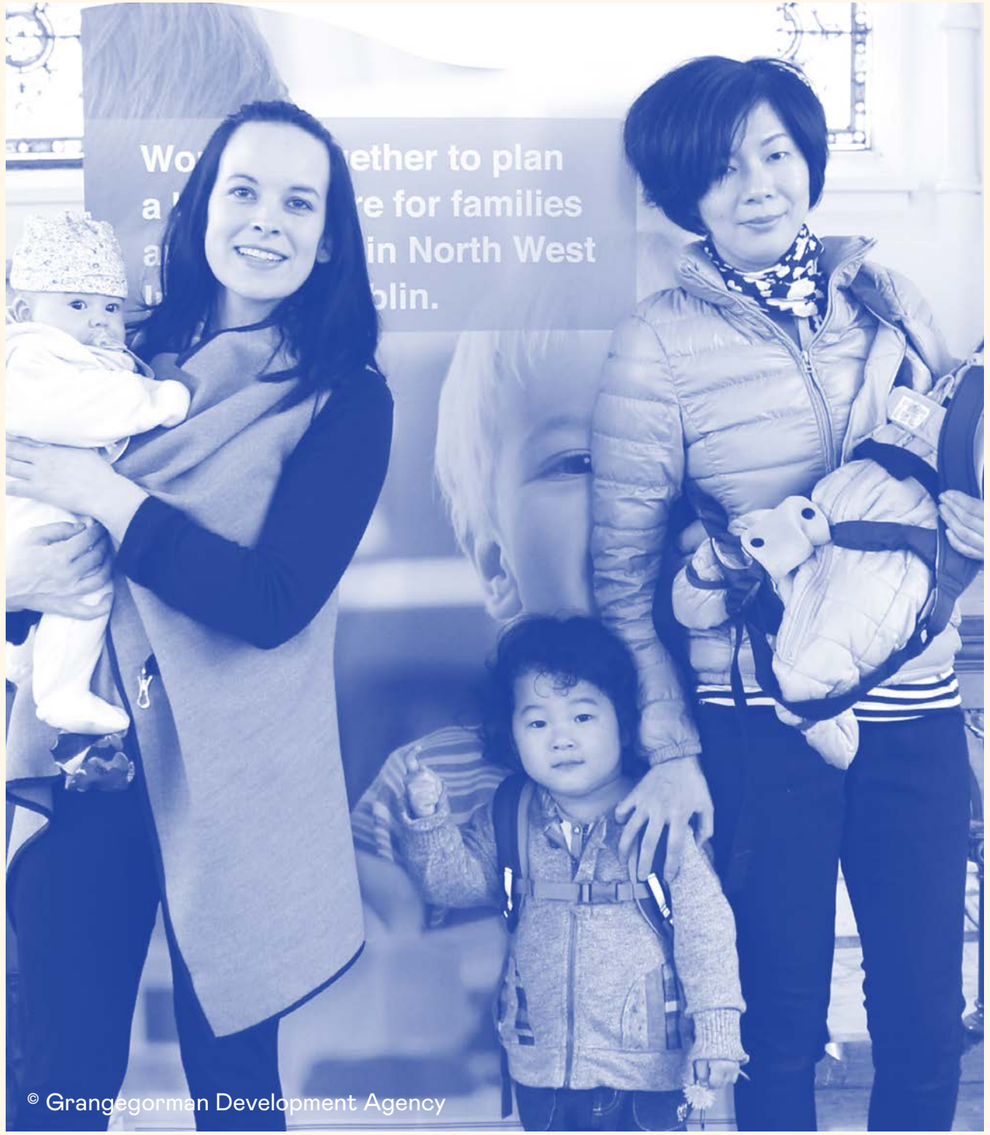

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This section provides an overview of the socio-economic and demographic data that was extracted and modelled for the Study Area. The analysis presents the data captured through the 2011 and 2016 Census, and the calculated change in recorded figures between these census periods.

Population

Within the Study Area, the population has been on an upward trajectory. Between 2006 and 2011, population increased by 4.1%, followed by another increase of 7% in the next intercensal period (2011 – 2016). In absolute terms, the population increased from 25,549 to 27,332 people during 2011 - 2016.

Population

+4.1% (2006-2011)

+7% (2011-2016)

Table 1: Study Area Population by ED

ED Name	Census			
	2006	2011	2016	Change (2011-2016)
Arran Quay A	1,502	1,555	1,785	14.8%
Arran Quay B	3,692	3,861	4,166	7.9%
Arran Quay C	3,711	4,170	4,471	7.2%
Arran Quay D	3,600	3,218	3,109	-3.4%
Arran Quay E	2,889	3,037	3,293	8.4%
Cabra East C	3,352	3,631	4,085	12.5%
Inns Quay B	3,136	3,368	3,666	8.8%
Inns Quay C	2,672	2,709	2,757	1.8%
Total	**24,554**	**25,549**	**27,332**	

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	2011	2016	Change (2011-2016)
Arran Quay A	1,555	1,785	+14.8%
Arran Quay B	3,816	4,166	+7.9%
Arran Quay C	4,170	4,471	+7.2%
Arran Quay D	3,218	3,109	-3.4%
Arran Quay E	3,037	3,293	+8.4%
Cabra East C	3,631	4,085	+12.5%
Inns Quay B	3,368	3,666	+8.8%
Inns Quay C	2,709	2,757	+1.8%

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The overall growth in population is reflected in the growth in all except one of the EDs in the Study Area. The EDs of Cabra East C (12.5%), Arran Quay A (14.8%), and Inns Quay B (8.8%) showed the highest percentage increases, with the EDs of Arran Quay B and Arran Quay C having the largest absolute populations with strong percentage growth evident between 7% - 8%. In contrast, the population in the Arran Quay D ED decreased in both intercensal periods, with an overall decrease of 3.4% between 2011 and 2016. In comparison, the NEIC's population grew by 11% from 2011 to 2016 (41,440 and 45,816 people respectively).

The population pyramids shown in Figure 5 indicate the similarities in population, age and gender composition between the Study Area and the NEIC.

Study Area Population by Gender and Age Group (2016)

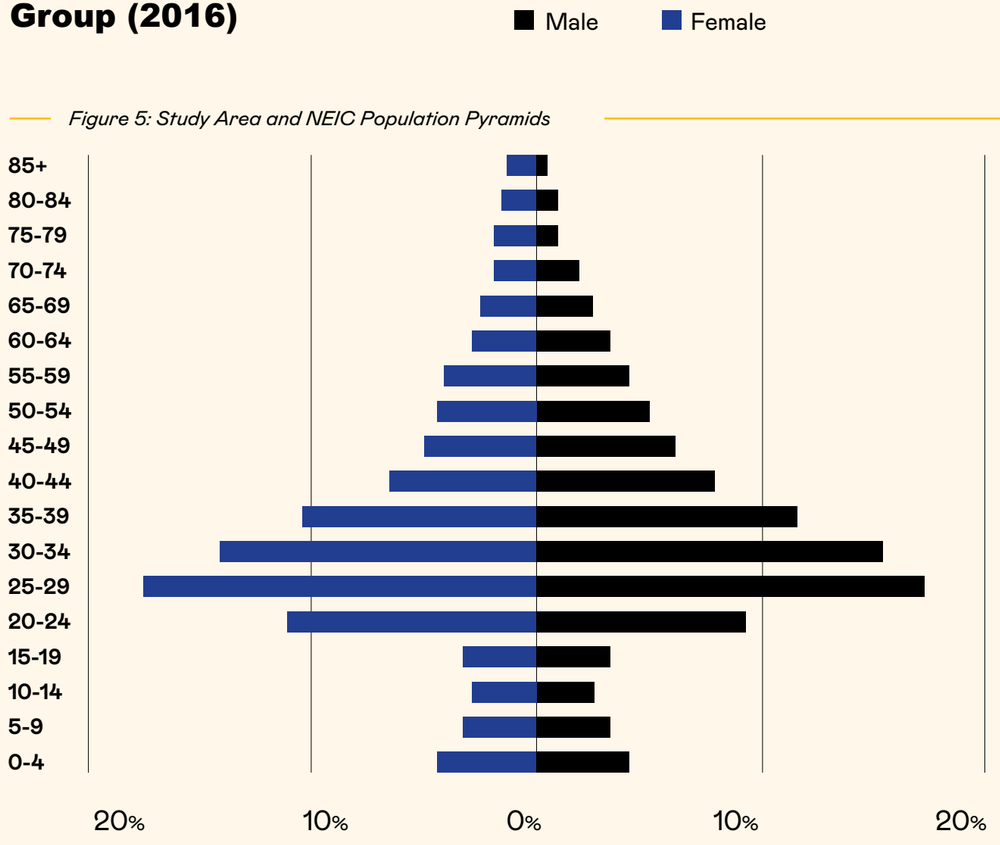
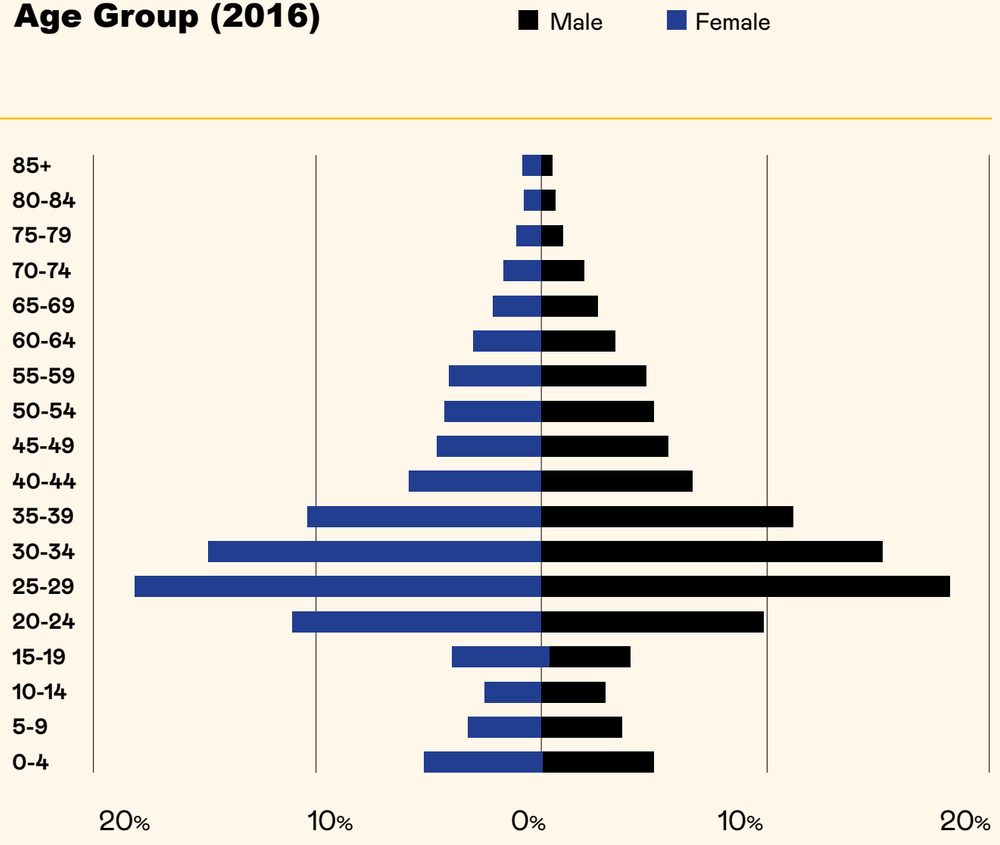


Figure 5: Study Area and NEIC Population Pyramids

Figure 5 shows a similar composition in the age and gender profile of the Study Area and the NEIC region in 2016. The majority of the population in the Study Area (53%) is between 20 and 39 years, with smaller percentages either side of this indicating a lower age dependency ratio in the Study Area.

NEIC Population by Gender and Age Group (2016)



As outlined in the table below, in the intercensal period the population in the age cohorts of 30-39, 50-59 and 60-69 years each grew by 13%-14%, with the 40-49 age cohort showing the largest growth (20%). Other marginal changes were recorded in the age cohorts of 10-19 (+2%), 20-29 (-2%) and 70-79 and 80+ (-0.2%).

Table 2

	Male			Female		
Age Groups	2011	2016	% Change	2011	2016	% Change
0 - 4	634	578	-9%	601	629	5%
5- 9	439	446	2%	400	425	6%
10-14	359	349	-3%	340	379	11%
15-19	455	468	3%	482	471	-2%
20-24	1522	1,327	-13%	1545	1,450	-6%
25-29	2343	2,426	4%	2268	2,314	2%
30-34	2035	2,178	7%	1782	1,863	5%
35-39	1343	1,637	22%	1048	1,379	32%
40-44	944	1,107	17%	691	865	25%
45-49	700	863	23%	598	690	15%
50-54	628	656	4%	573	605	6%
55-59	514	627	22%	454	569	25%
60-64	439	449	2%	347	406	17%
65-69	295	358	21%	269	320	19%
70-74	226	255	13%	294	253	-14%
75-79	184	174	-5%	241	261	8%
80-84	121	118	-2%	193	187	-3%
85+	64	80	25%	178	170	-4%
Total	**13,245**	**14,096**	**6%**	**12,304**	**13,236**	**8%**

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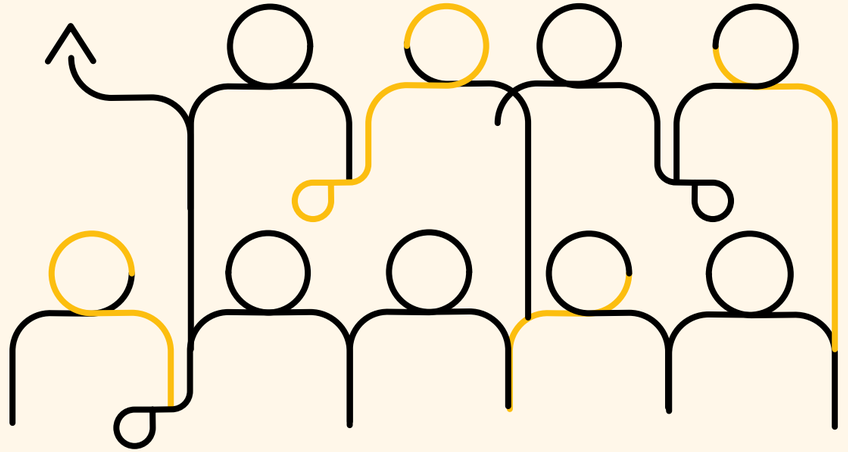
Key Changes %



	Male	Female
20-24	-13%	-6%
35-39	+22%	+32%
40-44	+17%	+25%
55-59	+22%	+25%

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When looking at groups of the population that are considered to be at a higher risk to and more vulnerable to deprivation, the older population and population with disabilities need to be assessed. According to Census, the population over 55 years, increased by 11% (408 persons) to 2016. The male and female population at or approaching retirement

(i.e. 65-69 years) increased by 21% and 19% respectively. Further, the proportion of persons with disability in the Study Area declined by 46% between 2011 and 2016, dropping from 7,646 to 3,913 persons. This may be associated with the closure of numerous HSE step-down facilities between 2006 and 2012/13, as well as the closure of the St Brendan's Psychiatric Hospital within the Study Area in 2013.

The gender spilt of population growth in the Study Area highlighted 8% growth in female population compared to the 6% growth in male population over the intercensal period. The substantial percentage growth seen in the 35-49 age brackets made a large contribution to the absolute growth in male and female population numbers. This was marked specifically by a 32% increase in females in the 35-39 age cohort and 25% in the 40-44 age cohort, while the numbers in the age cohort of 20-24 declined by 6%. The Census recorded a 23% increase in males in the 45-49 age cohort with a significant decrease of 13% in the 20-24 age cohort. The pre-adolescent age groups (0-14) in male and female numbers recorded disparate changes, with the number of females in the age bracket increasing by 7%, while male numbers decreased by 4%, owing up to an overall 1% increase in an age group accounting only for approximately 10% of the total population.

The development of the SDZ containing the TU Dublin Campus and the various HSE facilities will change the population dynamic in the Study Area. Specifically, the TU Dublin Grangegorman campus will likely result in an influx of students to the area, most likely between 20-29 years of age. Student housing development (further discussed in Section 4.2 of this report) could also add approximately 1,800 people to the resident population. In addition, TU Dublin Grangegorman have planning permission for the development of 2,000 student bed-spaces on campus. The future development of a 24-classroom Educate Together Primary School (i.e. provision of an additional eight classrooms) in the SDZ may also increase daytime activity of adolescent and pre-adolescent children (aged 0-9, 10-14), together with their families in the Study Area.

When looking at groups of the population that are considered to be at a higher risk to and more vulnerable to deprivation, the older population and population with disabilities need to be assessed. According to Census, the population over 55 years, increased by 11% (408 persons) to 2016. The male and female population at or approaching retirement (i.e. 65-69 years) increased by 21% and 19% respectively. Further, the proportion of persons with disability in the Study Area declined by 46% between 2011 and 2016, dropping from 7,646 to 3,913 persons. This may be associated with the closure of numerous HSE step-down facilities between 2006 and 2012/13, as well as the closure of the St Brendan's Psychiatric Hospital within the Study Area in 2013.

The gender split of persons with disability was relatively equal at 49.6% males and 50.4% females respectively. There was also change recorded in the number of people looking after vulnerable groups. Carers for persons in disadvantaged circumstances increased by 9%. This consisted of a 19% increase in the number of male carers, although the number of male carers (388) was less than the number of female carers (432) in 2016.

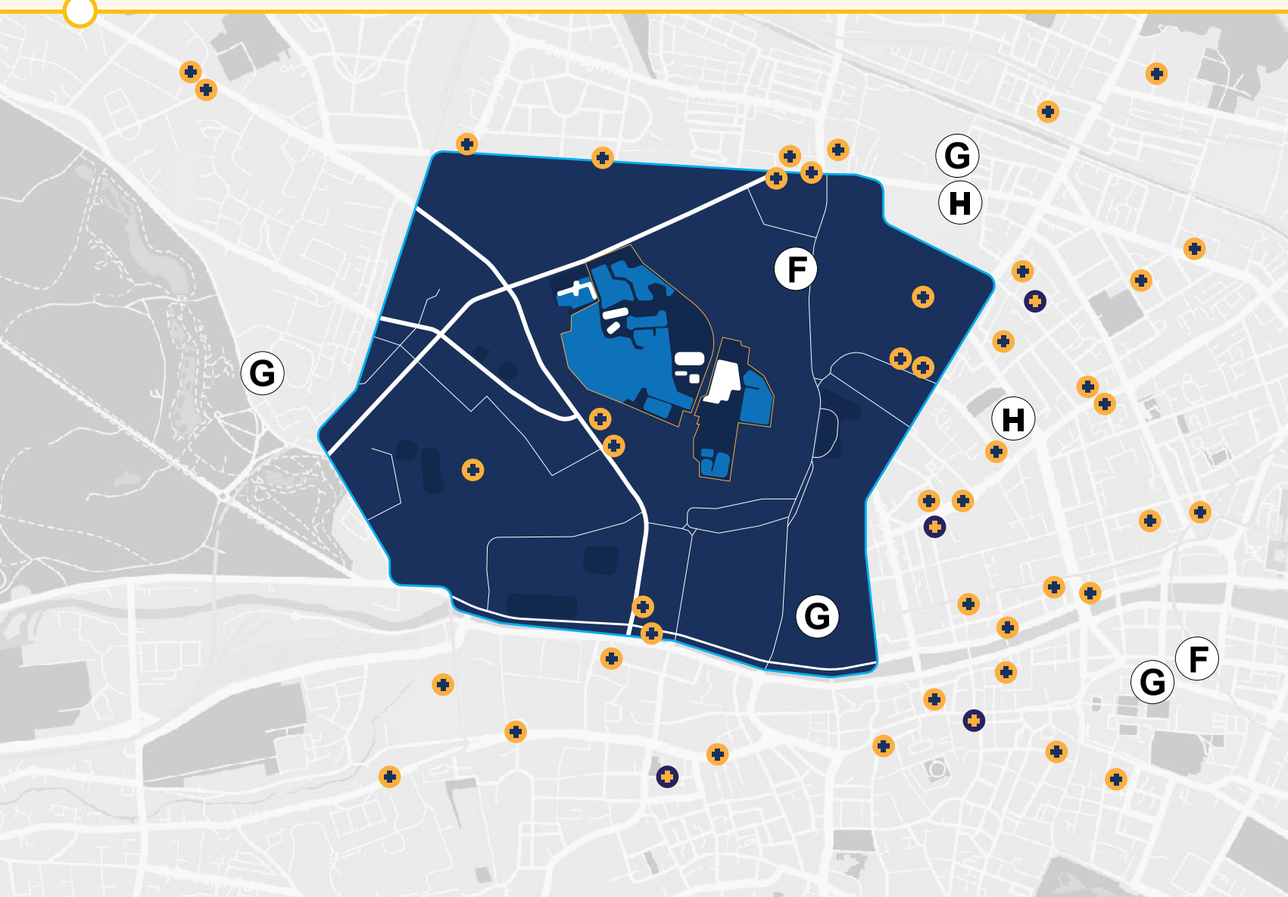
In terms of general health and wellbeing, disparate changes were recorded throughout the spectrum as seen in Table 3. The Census records the self-evaluated general health status of respondents (as opposed to the health status confirmed by medical practitioners).

From the table it is clear that the largest changes in health status were recorded throughout, with a 4% increase in very good health, a 5% decrease in fair health and a 7% increase in very bad health. This trend indicates a general decline in the health standards of people in the Study Area. It is evident that both male and female groups, although in different areas, showed an increase in poorer health conditions. The increase in poorer health conditions can be attributed to a variety of social and individual factors, of which access to medical care is an essential factor. Current social infrastructure analysis (as visualised in the map below) indicate that the Study Area contains 13 general practitioners and one primary care centre that serves an increasing population. The development of the HSE facilities will be a welcome addition in the Study Area (specifically for vulnerable groups such as the elderly and disabled), as well as its greater catchment. A single Fire Station and two Garda Stations were also identified. The influx of daytime population to the Study Area (as described in Section 5 of this report), and increased influx to be generated by the development of TU Dublin campus and student accommodation as well as the HSE facilities, could put pressure on the existing Fire and Garda stations in the Study rea which might need to be supplemented from surrounding areas. This could also highlight the opportunity to strengthen community involvement by community groups promoting and providing information and training on safety and security.

Table 3: General Health of Study Area Residents

	MALE			FEMALE			TOTAL		
General Health	**2011**	**2016**	**Change %**	**2011**	**2016**	**Change %**	**2011**	**2016**	**Change %**
Very good	6954	7184	3%	6472	6843	6%	13426	14027	4%
Good	4123	4105	0%	3894	3931	1%	8017	8036	0%
Fair	1240	1177	-5%	1197	1147	-4%	2437	2324	-5%
Bad	261	252	-3%	218	238	9%	479	490	2%
Very bad	54	64	19%	49	46	-6%	103	110	7%
Not stated	613	1314	114%	474	1031	118%	1087	2345	116%
Total	**13245**	**14096**	**6%**	**12304**	**13236**	**8%**	**25549**	**27332**	**7%**

Figure 6: Social Infrastructure (map 1)



Nationality and Ethnicity

The change in population within the Study Area saw a slight increase in both Irish nationals (4%) and others born overseas (3%) between 2011 and 2016. Within this 3% increase, a greater range of nationalities were also identified in 2016 when compared to 2011.

Nationality percentage

63% Irish

2% UK

3% Poland

1% Rest of World

Table 4: Usually resident population by nationality

Nationality	2011	2016	Change	2016 %
Ireland	15,665	16,283	4%	63%
UK	403	395	-2%	2%
Poland	1185	842	-29%	3%
Lithuania	276	206	-25%	1%
Other EU 28[4]	2,958	3,736	26%	14%
Rest of World	3,686	3,590	-3%	14%
Not stated	423	943	123%	4%
Foreign Nationals	8,508	8,769	3%	34%

4. This excludes British, Polish and Lithuanian nationals

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As seen in Table 4, the largest groups of nationalities were Irish nationals, followed by other EU countries and then the rest of the world. Despite the decline in British, Polish and Lithuanian nationals, the 26% increase in other EU nationals caused an overall increase in the proportion of those born overseas. The increase in the number of 'other EU' nationals and slight decrease in the 'rest of the world' classification propelled it to the largest non-Irish nationality group in the study area in 2016.

Ethnicity in the Study Area varied greatly as illustrated in Table 5. Although still the majority group, 'White Irish' residents declined by 5% to 54% in 2016, while the other minority groups recorded different fluctuations. 'Black or Black Irish' and 'Asian or Asian Irish' numbers declined by 10% and 20% respectively, while 'Other White' resident numbers, the second largest ethnic group, grew by 13%. The notable increase in 'Other' ethnic groups suggest a large influx to the area of persons with varied backgrounds that were not yet captured by the Census.

Table 5: Usually resident population by ethnic group

Ethnic Group	2011	2016	Change	2016 %
White Irish	14,957	14,162	-5%	54%
White Irish Traveller	62	66	6%	0.3%
Other White	5,454	6,176	13%	24%
Black or Black Irish	721	652	-10%	3%
Asian or Asian Irish	1,794	1,438	-20%	6%
Other	779	1,288	65%	5%
Not stated	829	2,213	167%	9%

Joining up the Dots - #3

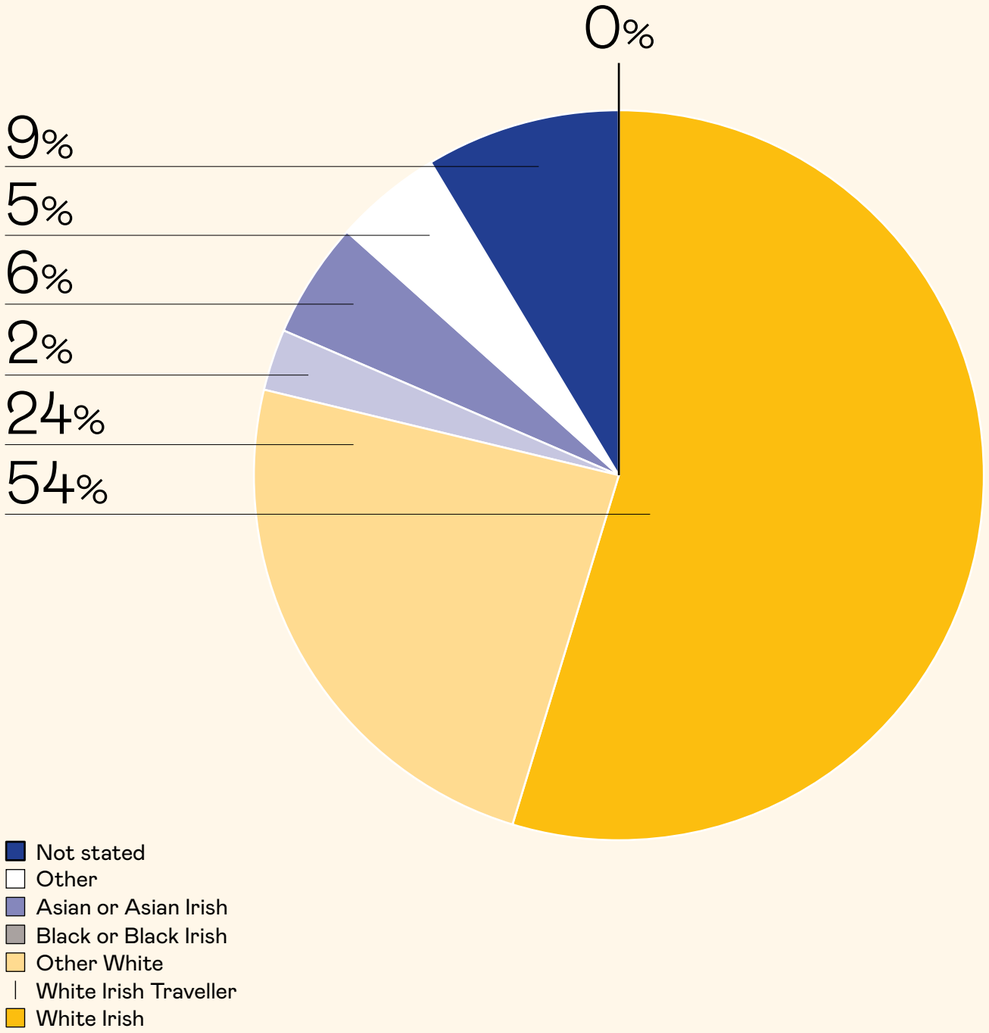

Figure 7: Usually resident population by ethnic group [CSO]

In comparison, non-nationals in the NEIC area also increased by 3% between 2011 and 2016, however they comprise 39% of the overall resident population. Similarly to the Study Area, the majority of residents in the NEIC are 'White Irish' nationals at 49% of total, with 'Other White' making up 24% of the ethnic composition in the NEIC. The largest change in nationalities in the NEIC was recorded for citizens from other EU states with a 38%, while in absolute terms still behind Irish citizens and citizens from the rest of the world.

Education

During the intercensal period there were considerable changes in the highest level of education achieved by the population within the Study Area. Figure 8 provides an overview of the changes.

As indicated in Figure 8, the percentage of people with qualifications for 'primary or lower' and 'up to leaving certification' have declined, compared to the increases in third level and higher-level education qualifications. The decrease in the lower level (i.e. primary and secondary) and increase in the higher-level qualifications (i.e. third level and above) indicates that more students tend to stay in education for longer to attain a higher level of qualification. The significant decrease of 27% and 22% of females in the 'primary or less' and 'up to leaving certification' groups during 2011 and 2016 respectively, show positive change in the equality to access and motivation for females to attain higher level qualifications. Their male counterparts also showed similar improvements, but to a lesser degree (25% and 18% for 'primary or lower' and 'up to leaving certification' respectively). Overall, the number of people that completed their leaving certification and achieved 'higher certification' (Level 6 on the National Framework of Qualifications [NFQ]) or 'bachelor's degrees' (NFQ Level 7) increased notably by 21% and 24% respectively. The number of males with an NFQ 7 qualification increased by 24% (from 3,017 in 2011 to 3,732 in 2016).

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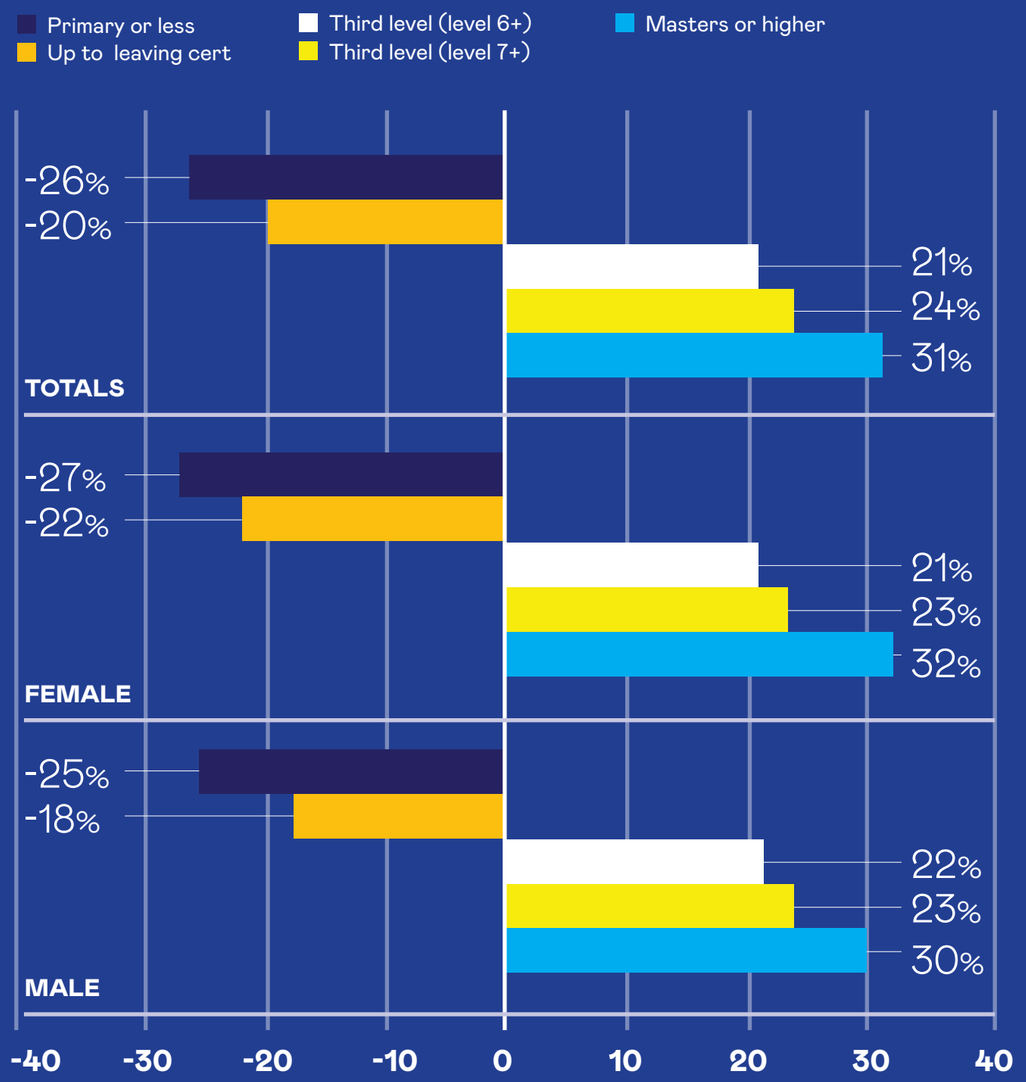


Figure 8: Change in highest level of education

Joining up the Dots - #3

Another indicator in the evaluation of education levels in the Study Area is the proportion of the population that leave school at different stages.

As seen in Table 6[5], there was an overall decline in the proportion of those that left education in primary and secondary school between 2011 and 2016. In turn, the number of school leavers 'after school' increased during that time. This indicates that an increased number of children were able and willing to complete school with the highest level of primary and secondary education (i.e. Leaving Certificate at the end of secondary school). Most significantly, the number of males aged under 15 years that ceased education declined by 45% whilst females also declined by 38%. Proportionately[6], the number of male and female school leavers aged 20 years and over increased from 2011 to 2016 by 11%. The male increase of 353 and female increase of 382 added a combined 835 to school leavers aged 20 years and over, contributing more than 60% to the total figure. This was accompanied by a decline from 12% to 8% in the proportionate total number of school leavers under 15 years of age.

Table 6: School leavers by age

	Male			Female			Total		
	2011	2016	Change	2011	2016	Change	2011	2016	Change
Primary School (age under 15)	792	434	-45%	809	501	-38%	1,601	935	-42%
Secondary School (age 15 - 19)	2,533	1,989	-21%	2,274	1729	-24%	4,807	3,718	-23%
After School (age 20 +)	3,264	3,617	11%	3,198	3580	12%	6,462	7,197	11%

5. All figures exclude 'Not Stated' category from Census data

6. Percentages based on totals excluding 'Not Stated' category from Census data

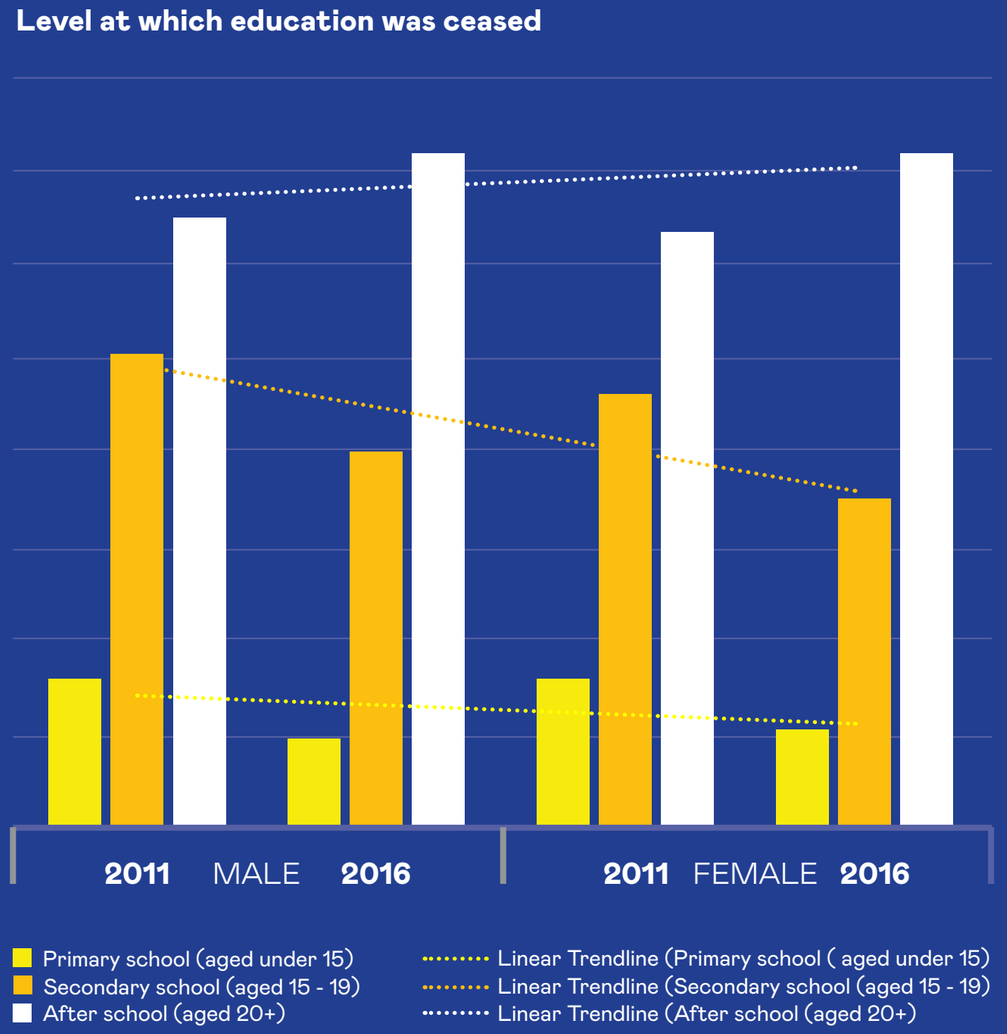


Figure 9: Level at which education was ceased by gender

The linear trendlines in Figure 9 display a downward trajectory for the number of school leavers in primary and secondary schools, coupled with an upward trajectory in the number of school leavers aged over 20 years. This indicates an increased level of educational attainment and growing demand for tertiary education opportunities for secondary school leavers.

The expansion of the Educate Together Primary School and TU Dublin (and its increasing capacity over the medium term) and will increase to primary and tertiary education capacity in the Study Area. This will facilitate those 'after school leaver' and decrease the 'early school leavers' within and outside of the wider catchment[7]. The evaluation of current provision of education facilities (2020) indicates the following:

In the NEIC area, the change in the level at which education ceased were less dramatic compared to the Study Area. Early school leavers (i.e. primary school) decreased by 24%, while the number of male and female school leavers at secondary school level declined by 4% and 10% respectively. The overall trend in the NEIC is marked by a 17% increase in the number of pupils that cease education after secondary school, while the number of school leavers at secondary school and primary school levels only decreased marginally.

7. Note that not all students and households making use of the education facilities may reside in the Study Area and would therefore not necessarily reflect changes in the Study Area's data.

14 Creches

7 Primary Schools

2 Secondary Schools

1 Third Level Education

Households

Table 7: Average Household Size in the Study Area

Average Household Size	
2011	2.12
2016	2.22

When compared to population figures, the number of households increased at a significantly lower rate (1%) from 2011 (11,381 households) to 2016 (11,520 households). This relatively small increase in the number of households compared to the larger growth in absolute population resulted in an increase in the average household size and various changes in the prominent household compositions.

As seen in Table 7, the average household size in the Study Area increased from 2.12 to 2.22 persons per household, which equates to a 5% increase in average household size during 2011 and 2016. The increase in household size also impacted the composition of households in the Study Area, which is detailed in Table 8.

> THE NUMBER OF HOUSEHOLDS INCREASED AT A SIGNIFICANTLY LOWER RATE (1%) FROM 2011 (11,381 HOUSEHOLDS) TO 2016 (11,520 HOUSEHOLDS)

Table 8: Composition of households in the Study Area

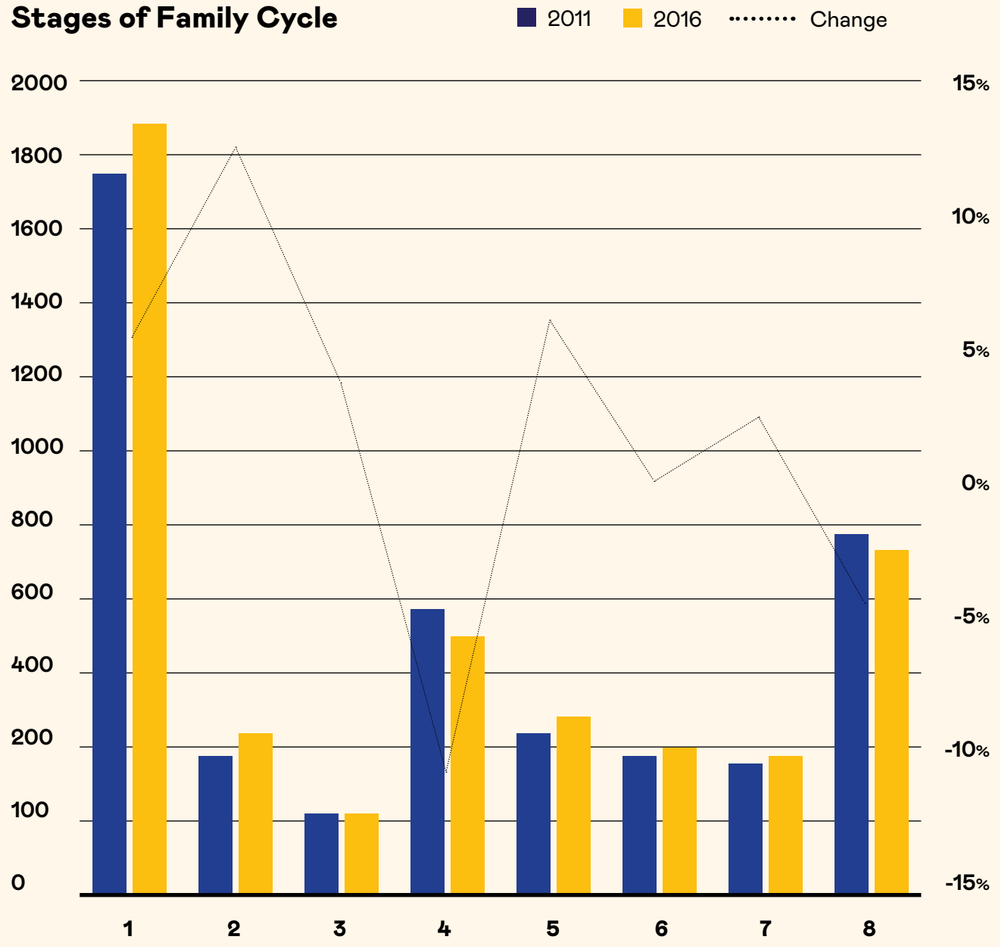
Composition of Households	2011	2016	Change	2016%
One person	4,265	3,795	-11%	33%
Married couple	882	955	8%	8%
Cohabiting couple	1,108	1,197	8%	10%
Married couple and children	1,026	1,077	5%	9%
Cohabiting couple and children	190	250	32%	2%
Father and children	116	92	-21%	1%
Mother and children	942	808	-14%	7%
Couple and others	295	296	0.3%	3%
Couple children and others	131	154	18%	1%
Father children and others	23	24	4%	0.2%
Mother children and others	129	108	-16%	1%
Two or more family units	119	101	-15%	1%
Non-family households and relations	576	622	8%	5%
Two or more non-related persons	1,579	2,041	29%	18%
Total	**11,381**	**11,520**	**1%**	

In 2011, the most prominent household compositions in the Study Area were 'one person' and 'two or more non-related persons' households, with 'cohabiting couples' and 'married couple and children' also contributing large portions. In the intercensal period, the household composition changed to reflect an increase in the number of dwellings housing multiple persons or multiple family units per dwelling. Single person households declined by 11% (470 units), alongside 29% increase in the number of 'two or more non-related persons' households (462 units). Similarly, the number of households consisting of 'cohabiting couples', 'couples with children and others' and married or unmarried couples with children increased by 223 units overall.

These increases contrasted with the decrease in the number of single parent households, and the number of households with multiple family units. Despite the decrease, 'one person' households are still most the prominent household composition type in the Study Area, followed by 'two or more non-related persons' and 'cohabiting couples'. Generally, household size grew with an increasing number of cohabiting adults, some of which have young children. The number of lone parent households, however, decreased from 2011 to 2016 by 178 (14.7%).

The change in population and household composition is also reflected in the family cycle data. The family cycles recorded in the Study Area reflect an increase in the number of pre-family, empty nest, and retired families, which may relate to the increase in cohabiting couples and non-related persons in households as previously outlined. The number of pre-school families declined by 11%, while early school families increased by 6%, as reflected in the increase in married or unmarried couples with children.

> SINGLE PERSON HOUSEHOLDS DECLINED BY 11%, ALONGSIDE 29% INCREASE IN THE NUMBER OF 'TWO OR MORE NON-RELATED PERSONS' HOUSEHOLDS (462 UNITS)



1. Pre-family
2. Empty nest
3. Retired
4. Pre-school
5. Early school
6. Pre-adolescent
7. Adolescent
8. Adult

Figure 10: Family cycles in the Study Area

Changes in the population and education levels triggered by the development of the TU Dublin campus, the primary school, and the HSE facilities, will similarly be reflected in the composition of households and the related family cycles. These developments could influence the number of 'single person' households, households with 'couples or parent(s) and children', and 'two or more non-related persons' households as students move to the Study Area. The 'adult', 'pre-school' and 'early school' family cycles could therefore increase, while the development of a step-down residential care centre for the elderly would increase the number of 'retired' persons considerably.
The housing stock in the Study Area was evenly split between houses and apartments (both at 46%) in 2011, with the number of apartments increasing to 50.2% in 2016. The average age of the housing stock in 2016 was 61 years, compared to the 54 years in 2011, alluding to a decline in the construction of new residential buildings in this intercensal period. Occupancy in the Study Area, however, increased by more than 5% (from 84.6% to 90.1%), which is in line with the associated increase in population and households. The type of occupancy (i.e. tenure) in the Study Area is dominated by rental from private landlords, although this figure decreased from 54% to 49% between 2011 and 2016. Owner occupancy declined by 1% (to 26% in 2016) while social housing was maintained at 15%.
The social infrastructure available for use by families and households include:

Community centres: 3

Community sports facilities: 1

Sports Halls: 1

As depicted in Figure 11, the Study Area has a relatively low supply of community facilities for such a densely populated urban area as there is just one community sports facility and one sports hall available for public use. The development within the SDZ that will supply a variety of sports, recreation and leisure public open space will greatly benefit the local population. Its central location within the Study Area ensures relative ease of access from all neighbouring areas within the Study Area, and its proximity to the transport links like the LUAS Grangegorman and Broadstone stops, among various bus stops, promotes the use of these facilities by the wider catchment.

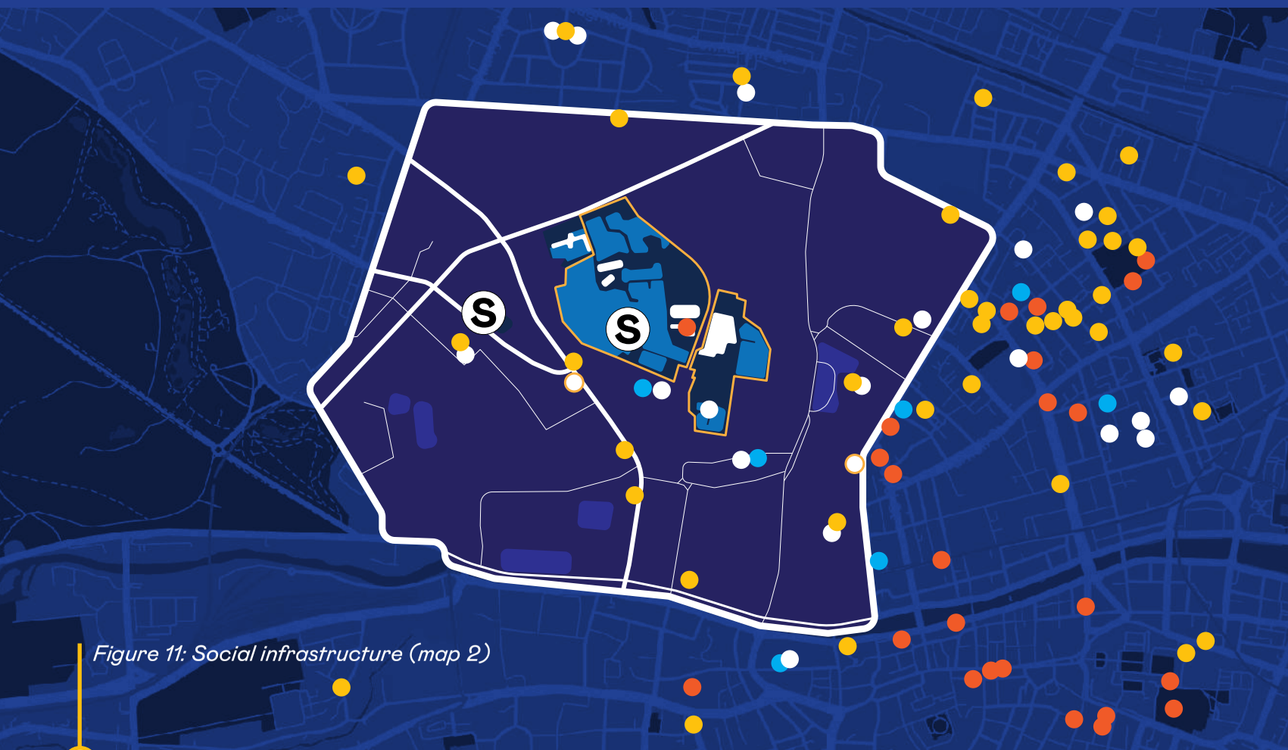


Figure 11: Social infrastructure (map 2)

Pobal Deprivation

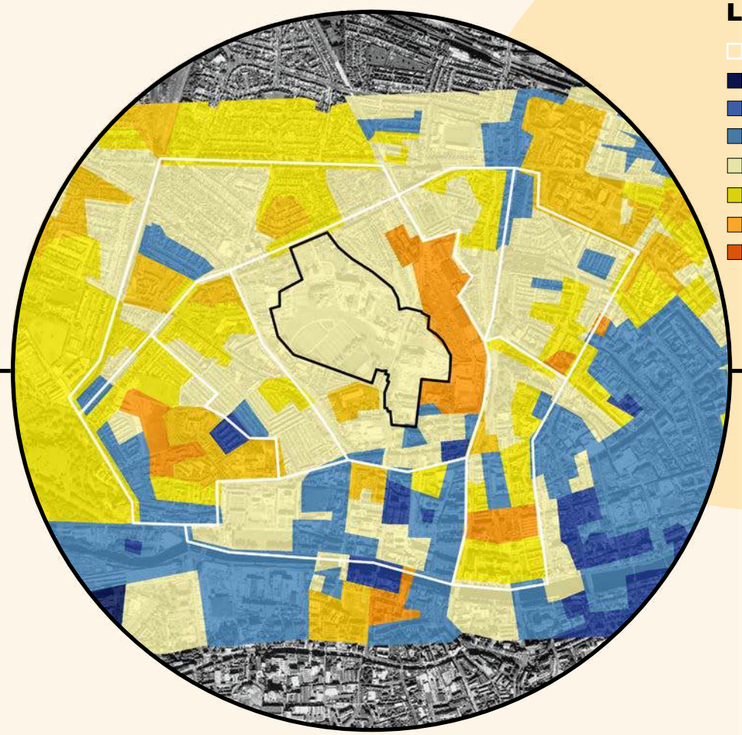
The Pobal HP Deprivation Index analysis has identified an overall increase in the rating score across all eight EDs of the Study Area. Table 9 provides an overview of the Relative Index Score for each ED. The Relative HP Deprivation Index show the position of any given ED relative to all other EDs and is based on the 2016 Census. The use of the relative index shows how the performance of an area (i.e. EDs in this case) relates to all other areas at that point in time.

From Table 9 it is evident that the EDs of Arran Quay D and Cabra East C have shown the largest improvement in index score and changing the index rating from 'marginally below average' to 'marginally above average'. Notwithstanding the decline in Arran Quay C between 2011 and 2016, it was still the only ED with a rating of 'affluent'. The improvement of the index scores across all EDs in the Study Area has seen an overall increase in the Relative Index Score from 2006 to 2016, with the rating improving from 'marginally below average' to marginally above average'.

The overall rating at ED level does however mask the intricacies of relative deprivation or affluence at lower level. Figures 12 and 13 show the 2011 and 2016 relative index rating at SA level in the Study Area.

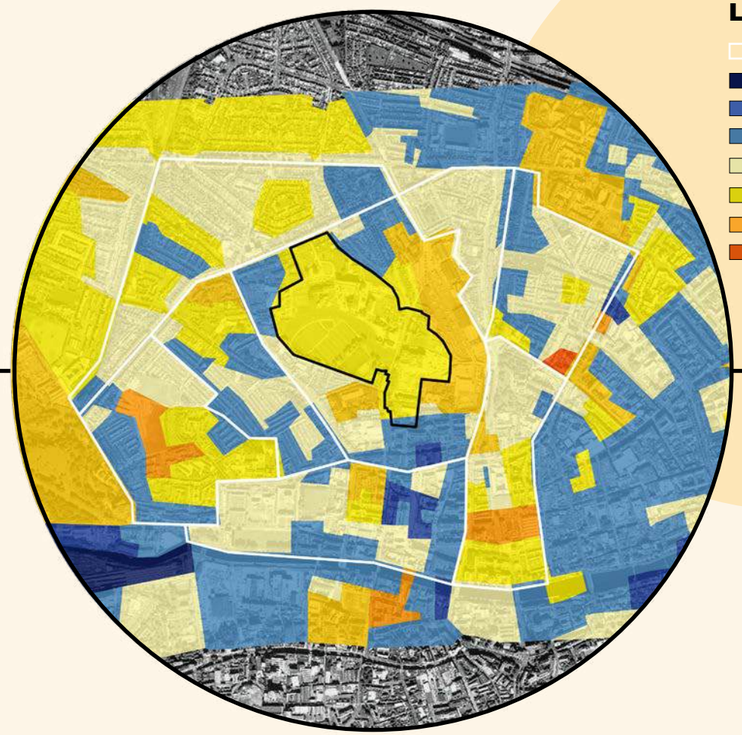
Table 9: Pobal Rating and Index for EDs in the Study Area

ED	2006	Rating	2011	Rating	2016	Rating
Arran Quay A	3.36	Marginally above average	4.32	Marginally above average	6.65	Marginally above average
Arran Quay B	3.51	Marginally above average	6.78	Marginally above average	7.65	Marginally above average
Arran Quay C	9.12	Marginally above average	12.71	Affluent	11.9	Affluent
Arran Quay D	-6.35	Marginally below average	-0.41	Marginally below average	4.79	Marginally above average
Arran Quay E	-0.22	Marginally below average	3.12	Marginally above average	6.79	Marginally above average
Cabra East C	-3.34	Marginally below average	0.76	Marginally above average	4.92	Marginally above average
Inns Quay B	-1.57	Marginally below average	4.08	Marginally above average	5.92	Marginally above average
Inns Quay C	-6.69	Marginally below average	-1.91	Marginally below average	-1.61	Marginally below average
Study Area	-0.23	Marginally below average	4.12	Marginally above average	6.28	Marginally above average
NEIC	-1.24	Marginally below average	5.23	Marginally above average	6.02	Marginally above average
Dublin City Council	-1.11	Marginally below average	2.22	Marginally above average	3.12	Marginally above average



2011

Figure 12: 2011 Pobal Deprivation Index Map



2016

Figure 13: 2016 Pobal Deprivation Index Map

The usage of maps enables a more detailed identification of the various levels of affluence or deprivation within each ED. As seen in the 2011 Pobal map, there are certain pockets of relative affluence and deprivation within each ED. The EDs of Arran Quay B and D, and Inns Quay B and C, have SAs classified as 'very disadvantaged', with the rating of the SA in Inns Quay B dropping even further in 2016 to the classification of 'extremely disadvantaged'. The decrease in the rating of certain SAs is stacked alongside other SAs where the ratings have changed from 'marginally below average' to 'marginally above average' and 'affluent'. This indicates disparate changes in the relative affluence and deprivation rating of the ED overall, where certain SAs have improved, and others have deteriorated dramatically over time.

The relative improvement in rating is evident in the central area of Arran Quay C and southern area of Arran Quay B with more 'affluent' SAs, while Cabra East C and Arran Quay D had an increase in 'marginally above average' SAs.

From the assessment of northern Dublin, which includes the majority of the NWIC and the NEIC areas, the overall Relative HP Deprivation Index rating from 2006 to 2016 has been 'marginally above average, although both NWIC and NEIC have shown similarly disparate trends in Relative HP Deprivation Index rating across ED and SA levels.

4

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Planning Applications and Permissions

Joining up the Dots - #3

The analysis of planning applications and permissions that have been granted from 2015-2020 have broadly indicated a trend in the development of medium to high density residential units, high density student accommodation and associated retail and commercial developments. The various planning applications granted and/or commenced are mapped in Figure 14.

The information related to planning grants are provided for context in relation to potential changes within the Study Area. This information is considered correct at the time of writing and may be subject to further change (i.e. through appeals, amendments, further applications). Further, it should be noted that a grant from the local authority does not equate to confirmed development as the commencement and completion of any such developments is the responsibility of the applicants.


DORA
DORA

Residential Development Pipeline

Table 10 provides a summary of the number of residential development pipeline and unit counts as submitted to ABP.

The residential development proposals in the Study Area for 2015 to 2020 include a number of medium to high density residential units and 49% of all units that have been granted permission have commenced construction. The residential development profile is characterized by a mixture of new construction (i.e. where older buildings have been demolished) along with the redevelopment and

Table 10: Residential development pipeline for the Study Area

Residential Development	Number of Developments	Total Units Developed	Commenced Units	Description
Commenced	1	41	36	Development of high-density apartment complex
Fully Commenced	3	78	78	Demolition of existing structures and development of new medium - high density residential units
Granted - Full (not commenced)	6	112	0	Upgrading / redevelopment of protected structures, demolition of older buildings, development of new medium and high-density residential units, majority apartments one- and two-bedroom units.
Total	**10**	**231**	**114**	

upgrading of protected structures in residential areas. The redevelopment of residential buildings that are protected structures ensures that important aesthetic value and cultural heritage of the area is retained, whilst upgrading these homes to new building standards.

By assuming that each residential unit contains a household unit, and that the composition of households stay similar to the 2016 Census, it has been estimated that the household composition, as seen in table 11 may be created within the Study Area:

On the assumption that each residential unit constitutes a household with an average household size of 2.22 persons, the 231 new households would equate to 513 more people resident in the Study Area. The 513 additional people is a 1.9% addition to the total 2016 population of 27,332 people.

Table 11: Proposed change to household composition of the Study Area

Composition of Households	2016%	2020
One person	33%	76
Married couple	8%	19
Cohabiting couple	10%	24
Married couple and children	9%	22
Cohabiting couple and children	2%	5
Father and children	1%	2
Mother and children	7%	16
Couple and others	3%	6
Couple children and others	1%	3
Father children and others	0.2%	0
Mother children and others	1%	2
Two or more family units	1%	2
Non-family households and relations	5%	12
Two or more non-related persons	18%	41
Total		**231**

Student Housing Development Pipeline

The pipeline for private student accommodation (which excludes all on-campus accommodation developed/provided by TU Dublin), illustrated planning applications for 1,782 bed spaces across 326 units as illustrated in Table 12. By February 2020, construction has commenced on 36% of the spaces.

Private Student Accommodation Pipeline

Table 12: Private student accommodation pipeline in the Study Area

	Bed Spaces
Construction commenced	637
Grant	1145
Total	**1782**

As part of the SDZ, provision has been made for the development of 2,000 bed spaces for students on campus in addition to the private student accommodation pipeline. It is expected that the increased student population will mainly consist of full-time students who are in general not seeking employment and are relatively transient. Existing private student accommodation facilities in the Study Area comprise seven high density developments offering a total number of 1,795 bed spaces (excluding students living at home or outside of the Study Area), as detailed in Table 13.

The granted development of student accommodation will lead to a total of 5,577 bed spaces available for students in the Study Area. The addition of these 3,782 beds will potentially add 50% to the 20-29 age cohort[8], which would constitute 14% growth within this cohort on the 2016 population.

Existing Private Student Accommodation

Table 13: Existing private student accommodation in the Study Area

	Total bed spaces
Ardcairn	571
Blackarch	300
Broadstone hall	102
Dorset point	447
LIVStudent Church Street	218
Student homes.eu	32
Swuite Grangegorman	125
Total	**1795**

8. Assumption that all students fall in the 20-29 age cohort.

Other Commercial Development Pipeline

With the increase in residential and student accommodation in the Study Area, other portions of the Study Area are adapting to meet the change in demand in the area. Commercial development has shifted from traditional commercial only, to an increasing level of mixed use residential, retail and commercial developments in alignment with the relevant planning policy.

Table 14: Commercial development pipeline in the study area

Commercial Development Pipeline	Count	Description
Commenced	4	Upgrading of existing commercial units to comply with new building regulations, construction of mixed-use development (residential/commercial)
Grant Permission	18	Upgrading / redevelopment of protected structures to comply with new building regulations, change of use from commercial/ retail to food & beverage outlets (cafe, fast food, restaurants), and mixed-use development (residential/retail/commercial)
Plans Granted	10	Redevelopment of office and commercial space, redevelopment (some of which involve demolition) of space for mixed use, redevelopment of protected structures in SDZ
Total	**32**	

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Commercial Development Pipeline

As noted in Table 14, commercial redevelopment in the Study Area has shown an increase in the establishment of multi-use and retail and food and beverage operations, to meet the growing demand from the increase in population.

Joining up the Dots - #3

Commenced	4
Grant Permission	18
Plans Granted	10
Total	32

Medical Facilities

The period between 2015 and 2020 recorded a substantial number of developments and changes in the provision of medical facilities in the Study Area. In this time, ABP granted the development, restoration and/or extension of 70 medical related establishments in the Study Area. The applications were evaluated in two sections – change of use, and new developments or extensions as summarised in Table 15 and 16.

Table 15: Applications for change of use to medical facilities

Change of Use Applications	Plans Granted	Summary Description
Change of use to medical related activities (incl. counselling, consultancy, administration)	29	Change of use from office or residential to medical related activities
a. of which Dental related activities	4	Change of use from office to dental surgery
b. of which Veterinary related activities	1	Change of use from commercial to veterinary services

Table 16: Overview of development of existing medical facilities

Development and/or Extension of Medical Facilities	Plans Granted	Summary Description
Development and/or Extension of Medical Facilities	41	
a. of which mixed use developments	2	Mix of residential, retail, medical, cafes, restaurant, childcare facility and co-working spaces (including office and consultation spaces).
b. of which Dental related activities	1	New dental care unit
c. of which other ancillary services	3	New Medically Supervised Injection Facility, additional landscaping and sensory space creation, extension of office/administration facilities.

The prevalence of multiple existing medical facilities in the Study Area (such as the Mater Misericordiae University Hospital, Mater Private Hospital, St Bricins Military Hospital, Catherine McAuley Centre, Centre for Nurse Education, Centre for Liver Disease, Connolly Norman House (mental health services centre) and the Grangegorman Primary Care Centre) sets a precedent for the future development of additional medical and other ancillary services. This is evident not only in the plans granted (41 plans granted for development and/or extension of medical facilities), but even more so in the change of use from commercial or residential use to the use for medical facilities (29 plans granted). The quantum of change of use applications show how demand for certain services change over time as the demographic profile increases and changes. The development of mixed use facilities does indicate the tendency to use space more efficiently in order to provide related services in a convenient and accessible location. The majority of applications were granted in 2017 (24%) and 2019 (34%).

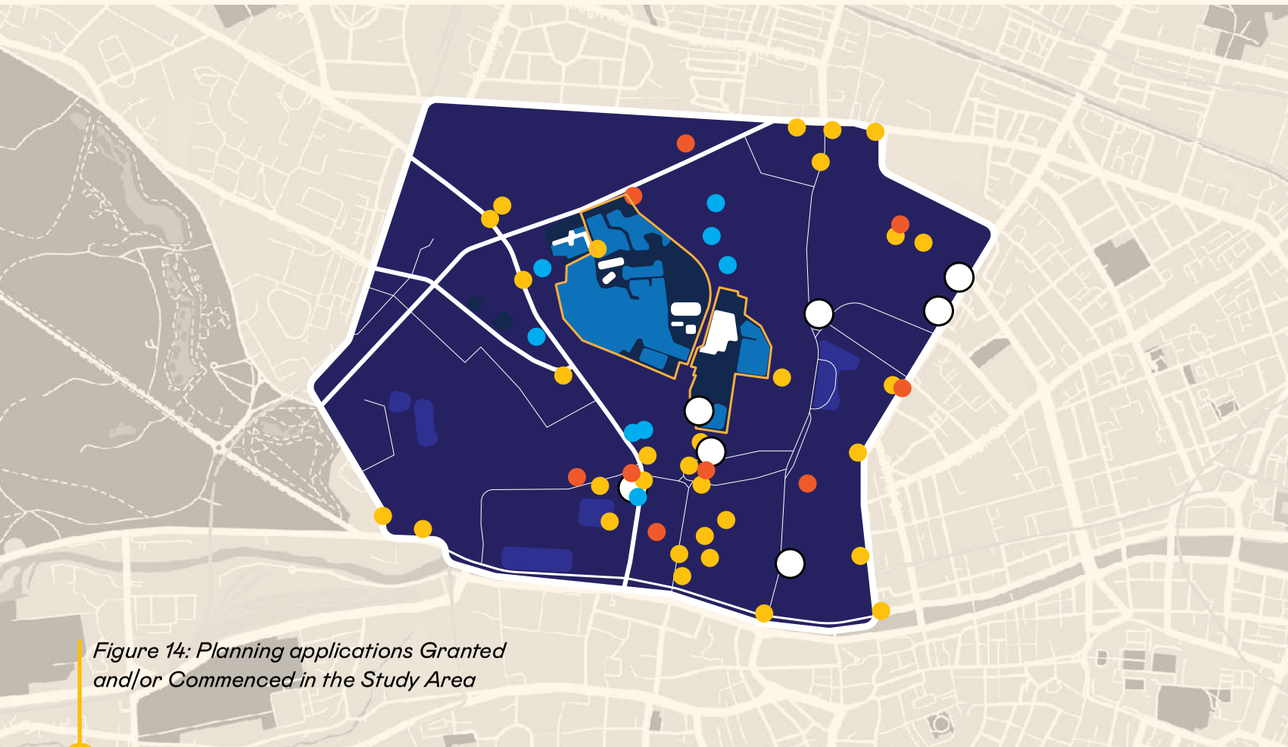

Figure 14: Planning applications Granted and/or Commenced in the Study Area

- COMMERCIAL PIPELINE
- EXISTING PRIVATE STUDENT ACCOM
- STUDENT ACCOM PIPELINE
- RESIDENTIAL PIEPLINE
- CAMPUS
- STUDY AREA

5

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Economy and Employment

The following section provides an overview of the labour market characteristics and employment profile in the Study Area, as collected in the 2011 and 2016 Census.

Joining up the Dots - #3

> “ ..with a steady decline of 30% in unemployment, the employment figure in the study area increased by 23.34%, making out 60% of the population that are 15 years and older... ”

Principal Economic Status

The principal economic status as captured by the CSO, provides a breakdown of the number of people aged 15 years and older in the labour force at work as well as those looking for their first job or unemployed. Persons or groups over 15 years of age not participating in the labour force are typically students, home makers, retirees and persons unable to work due to illness or disability and they are considered to not be economically active.

Table 17 provides an overview of the principle economic status of the labour force in the Study Area.

Table 17: Principle economic status of persons aged 15 and older in the Study Area

Principal Economic Status	2011	2016	Change	2011%	2016%
At work	11,990	14,789	23.34%	53%	60%
Looking for first regular job	369	362	-1.90%	2%	1%
Unemployed having lost or given up previous job	3,143	2,199	-30.03%	14%	9%
Student	3,214	2,991	-6.94%	14%	12%
Looking after home/family	1,047	1,055	0.76%	5%	4%
Retired	1,880	1,916	1.91%	8%	8%
Unable to work due to permanent sickness or disability	1,071	1,023	-4.48%	5%	4%
Other	62	191	208.06%	0.3%	0.8%
Total	**22,776**	**24,526**			

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Principal Economic Status


At Work +23.34%

Looking for first regular job -1.90%


Unemployed having lost/given up job -30.03%


Student -6.94%


Looking after home/family +0.76%


Retired +1.91%


Unable to work due to permamnet sickness -4.48%

Joining up the Dots - #3

With a steady decline of 30% in unemployment, employment in the Study Area increased by 23.34% to 2016, which equates to 60% of the population that are 15 years and older. The decline in the number of students coincided with the decline in the population aged 20-24 years, while the increase of retirees is in line with the increase in the proportion aged 60-69 and 70-79 years.

By comparison, employment in the NEIC area increased by 27%, while unemployment decreased by 19.9%. However, the number of persons looking for their first regular job also decreased by 17.3% in the NEIC area. Despite a substantial increase in retirees (18%), the proportion of the population not economically active decreased by 4.4% as specifically, students decreased by nearly 19%. Table 18 provides an overview of the gender split in labour force characteristics within the Study Area.

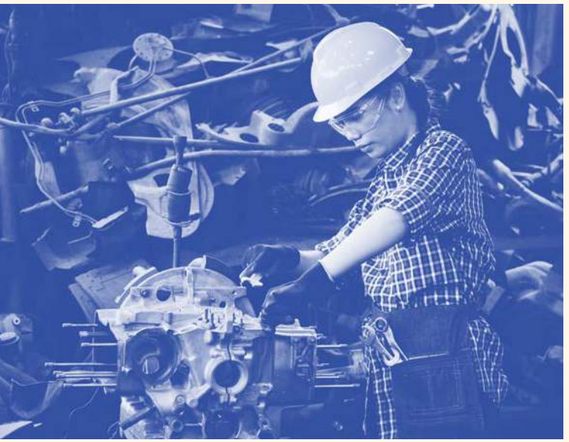
The same trends are seen in both genders within the labour force, with employment across gender groups increasing, leading to subsequent decreases in unemployment. Male employment increased by more than double the rate of female employment, while there was a larger decline in male student numbers than female student numbers.

Table 18: Principle economic status by gender

	Male			Female		
Principal Economic Status	**2011**	**2016**	**Change**	**2011**	**2016**	**Change**
At work	52%	63%	10.69%	53%	57%	4.39%
Looking for first regular job	2%	1%	-0.38%	1%	1%	0.12%
Unemployed having lost or given up previous job	18%	10%	-7.32%	10%	8%	-2.15%
Student	14%	11%	-2.90%	14%	13%	-0.85%
Looking after home/family	1%	1%	0.15%	9%	8%	-0.78%
Retired	8%	7%	-0.33%	9%	8%	-0.57%
Unable to work due to permanent sickness or disability	5%	5%	-0.59%	4%	4%	-0.47%
Other	0%	1%	0.69%	0%	0%	0.31%

Job Growth

The economically active labour force has increased from 2011 to 2016 by 11.9% (to a total of 71%). This equated to 1,848 additional people willing and able to participate in employment. The proportion of the population that are not economically active declined by 1.35% despite the increase in retirees and people looking after their homes or families. This decline may however be linked to the decline in the proportion of students in the Study Area.



labour force has increased from 2011 to 2016 by **11.9%**

to a total of **71%**

to a total of **1,848**

Employment Trends in the Study Areas

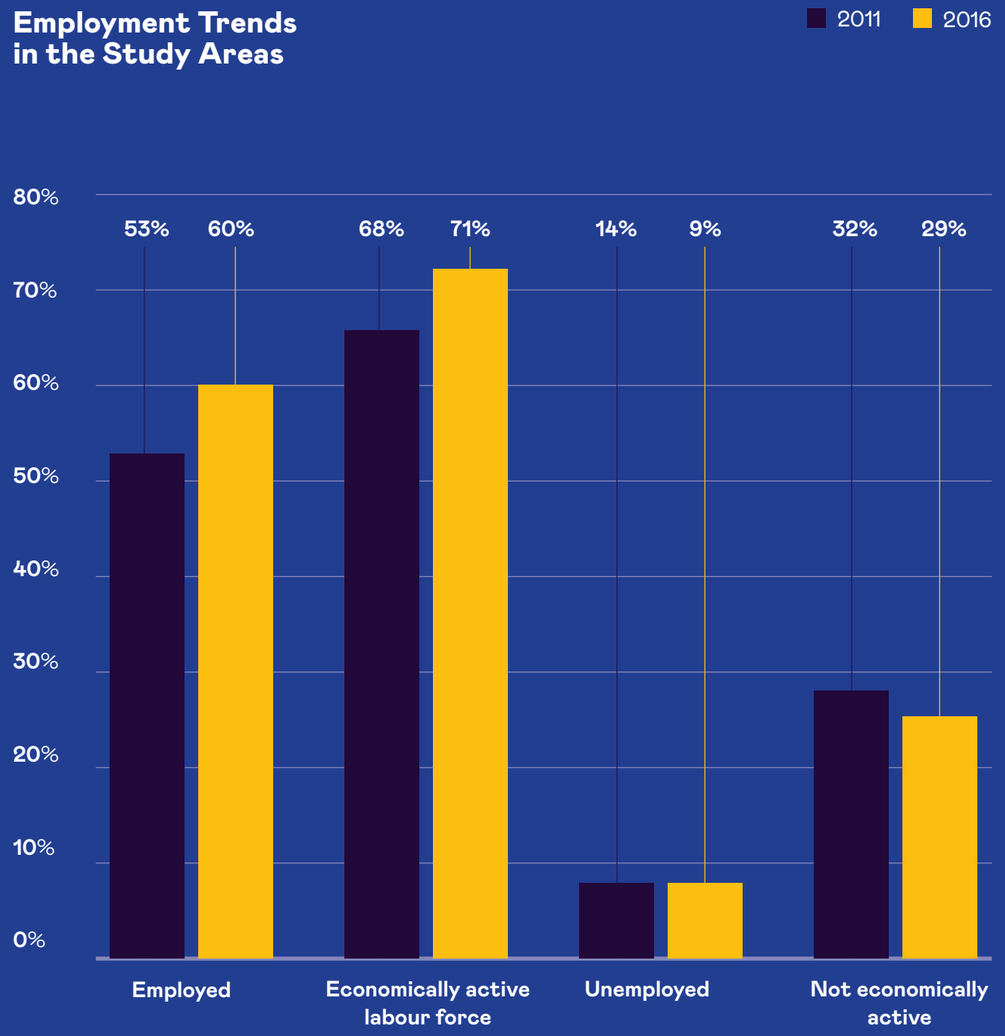


Figure 15: Employment trends in the study area

The GDA set up, in collaboration with the GLLF, the Grangegorman Employment Charter in an effort to facilitate the creation of jobs and training opportunities (full time employment and/or apprenticeships) for local residents. The Charter was designed to encourage subscribed contractors to employ at least 20% of its workforce from residents of Grangegorman and surrounding areas. Recent recorded figures demonstrate that during 2015 to 2019 indicate a total of 12,042 jobs have been created by contractors, of which 1,395 (12%) have been allocated to local residents as outlined in Table 19.

Table 19: Record of employment created for on-site construction work for the project (Grangegorman Employment Charter)

	2015			2016		
	TOTAL NUMBER EMPLOYED	**LOCAL EMPLOYEES**	**% LOCAL**	**TOTAL NUMBER EMPLOYED**	**LOCAL EMPLOYEES**	**% LOCAL**
Jan	146	34	23%	40	7	18%
Feb	144	32	22%	45	8	18%
Mar	190	39	21%	50	9	18%
Apr	201	39	19%	50	11	22%
May	181	37	20%	58	10	17%
Jun	185	28	15%	53	8	15%
Jul	142	24	17%	53	8	15%
Aug	131	23	18%	47	9	19%
Sep	125	17	14%	52	8	15%
Oct	37	6	16%	48	6	13%
Nov	37	6	16%	38	6	16%
Dec	40	7	18%	0	0	
Ave.	130	24	19%	45	8	17%
Total	**1559**	**292**	**19%**	**534**	**90**	**17%**

9. There was no construction on site during 2017 due to legal processes, and subsequent revision of contracts. Employment opportunities on site resumed in October 2018.

>> Table 19: Record of employment created for on-site construction work for the project (Grangegorman Employment Charter)

	2018[9]			2019		
	TOTAL NUMBER EMPLOYED	**LOCAL EMPLOYEES**	**% LOCAL**	**TOTAL NUMBER EMPLOYED**	**LOCAL EMPLOYEES**	**% LOCAL**
Jan	-	-	-	442	35	8%
Feb	-	-	-	546	44	8%
Mar	-	-	-	577	53	9%
Apr	-	-	-	600	59	10%
May	-	-	-	696	61	9%
Jun	-	-	-	700	68	10%
Jul	-	-	-	783	89	11%
Aug	-	-	-	783	82	10%
Sep	-	-	-	783	90	11%
Oct	135	31	23%	905	92	10%
Nov	353	39	11%	1169	117	10%
Dec	336	35	10%	1141	118	10%
Ave.	275	35	13%	760	76	10%
Total	**824**	**105**	**13%**	**9125**	**908**	**10%**

The monthly average number of local persons employed through the Grangegorman Employment Charter over the period is 36, with highs of 118 (December 2019) and lows of zero in December 2016. As the project has progressed, employment has increased, with peaks at the start (2015) and relatively high and increasing levels evident during the most recent stages of the project (2019).

Local Employees

Figure 16: Number of local people benefiting from employment creation

The monthly average number of local persons employed through the Grangegorman Employment Charter over the period is 36, with highs of 118 (December 2019)...

Employment Distribution

SOCIAL CLASS

The employment figures have been recorded in the seven social class groups classified by the CSO during the most recent Censuses with the information relevant to the Study Area presented in Table 20.

Table 20: Employment figures by social class

Social Class	2011	2016	Change	2016%
Professional workers	1861	2302	24%	8%
Managerial and technical	5418	6289	16%	23%
Non-manual	3690	3712	1%	14%
Skilled manual	2787	2530	-9%	9%
Semi-skilled	2912	2730	-6%	10%
Unskilled	1537	1369	-11%	5%
All others gainfully occupied and unknown	7344	8400	14%	31%
Total	**25549**	**27332**	**7%**	**100%**

Social Class

Professional workers **+24%**

Managerial and technical **+16%**

Non-manual **+1%**

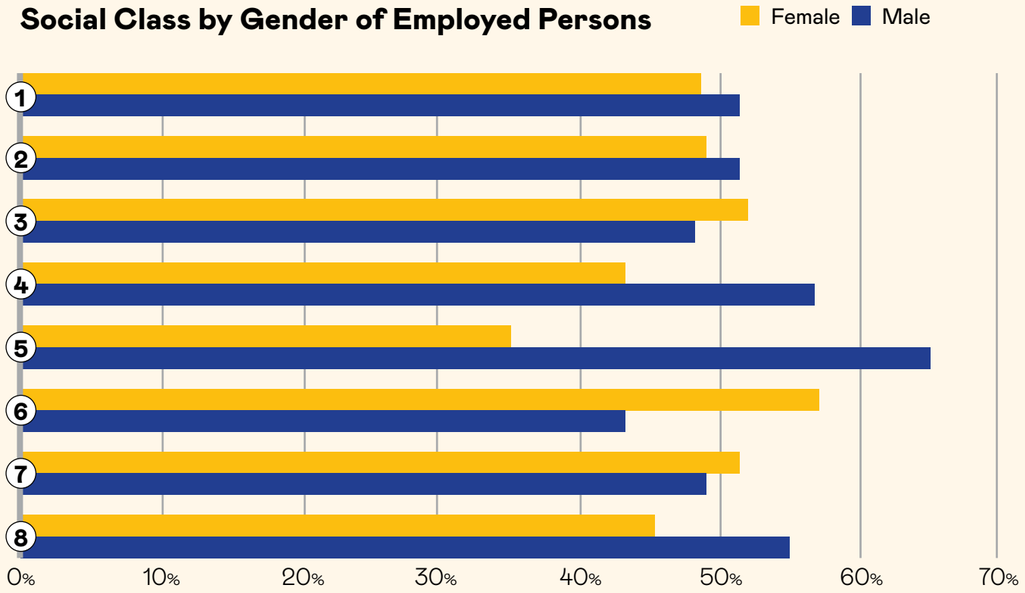
Skilled manual **-9%**

Semi-skilled **-6%**

Unskilled **-11%**

All others grainfully occupied and unkown **+14%**

In 2016, the social class with the majority of employed persons was ‘all others gainfully occupied and unknown’. The ‘managerial and technical’ class recorded 16% increase during 2011 - 2016, and ranks as the second highest in terms of employment. The 2016 Census indicates that there is a slightly higher proportion of males in employment and that men dominate the professional workers (55%), skilled manual (65%) and semi-skilled (57%) social classes whilst women occupy the majority of non-manual (57%) and unskilled (52%) social classes.



1. Total
2. All others grainfully occupied
3. Unskilled
4. Semi-skilled
5. Skilled manual
6. Non-manual
7. Mangerial and technical
8. Profesional workers

Figure 17: Social Class of employment by gender

OCCUPATION TYPE

The proportion of occupation types recorded in the Study Area during 2011 and 2016 are displayed in Table 21.

Table 21: Employment by occupation type

Occupation Type	2011	2016	Change (Study Area)	Male (2016)	Female (2016)	Change (NEIC)
Managers Directors and Senior Officials	5.6%	5.3%	-0.3%	503	394	-0.8%
Professional Occupations	19.1%	20.5%	1.4%	1,805	1,680	-0.3%
Assoc. Professional & Technical Occupations	11.8%	13.3%	1.5%	1,201	1,052	-0.5%
Administrative & Secretarial Occupations	9.0%	8.3%	-0.7%	547	865	-1.2%
Skilled Trades Occupations	8.1%	6.8%	-1.3%	1,011	138	-0.7%
Caring Leisure and Other Service Occupations	5.2%	5.0%	-0.2%	236	618	-0.3%
Sales and Customer Service Occupations	8.1%	6.8%	-1.3%	508	650	-0.7%
Process Plant and Machine Operatives	4.1%	3.0%	-1.1%	453	61	-1.0%
Elementary Occupations	16.0%	13.1%	-2.9%	1,275	951	-1.9%
Not stated	13.0%	17.9%	4.9%	1,793	1,247	7.4%
Total	**100%**	**100.0%**		**9,332**	**7,656**	

The largest portion of the labour force in the Study Area are employed in 'professional occupations', with 'associate professional and technical' and 'elementary' occupations contributing the second highest portion of employment. Notably, (apart from 'not stated' occupations) all occupations except the two most prominent have declined compared to the 1.4% and 1.5% increases in 'professional occupations' and 'associate professional and technical occupations' respectively. In contrast within the NEIC, 'professional occupations' and 'associate professional and technical occupations' were also recorded as having the highest portion of employment, although all occupation types declined. The increase in 'not stated' occupation types could indicate a shift in employment types available that were not captured in the 2016 Census.

INDUSTRY

Employment across industries generally align with the abovementioned occupation types, as the 'commerce and trade' and 'professional services' industries are where the majority of the labour force in the Study Area are employed as illustrated in Figure 18.

Even though the 'commerce and trade' and 'professional services' industries are the largest employers, change in the intercensal period recorded a decline of 2% and 3% in employment in those industries respectively. Employment in 'Other' industries in the Study Area have increased more than 5% to a total of 30% in 2016.

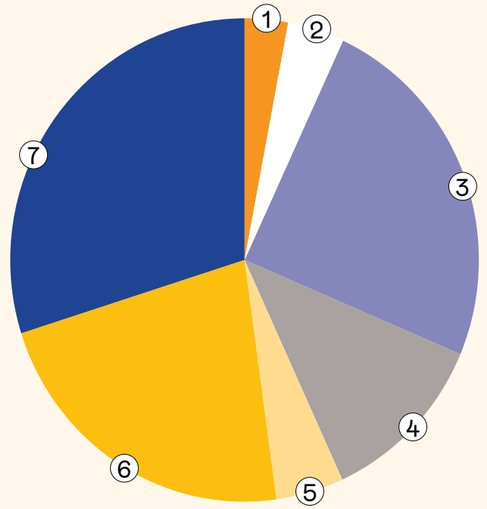


Figure 18: Employment by industry in the Study Area

Workplace Zones

The workplace zones seen in the map below were chosen as the best possible fit to the Study Area as the Workplace Zones have different geographic boundaries. The data extracted in relation to Workplace Zones therefore reflects only the area as shown in Figure 19.

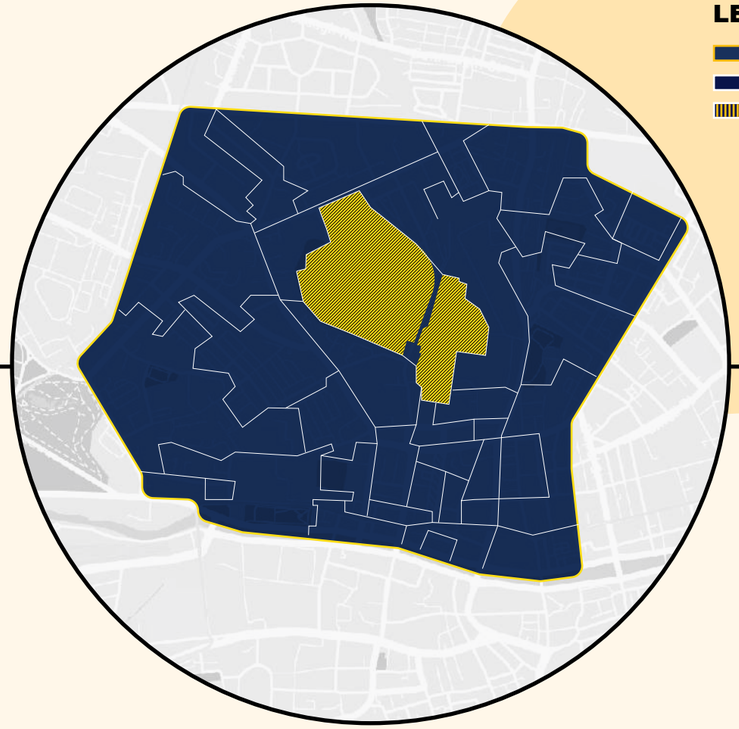


Figure 19: Workplace zones in the Study Area

The Workplace Zones within the Study Area recorded the following summary data:

Sum of Total workers in workplace zone: **14,546**

Sum of Total Daytime population in workplace zone: **27,189**

Total non-working daytime population (studying / at home): **12,643**

The total daytime population of the Workplace Zones in the Study Area includes the resident population that work or stay in the area during the day, combined with all people that enter the Study Area during the day from anywhere else. The total number of workers in the Workplace Zones was estimated to be 14,546 people, which accounts for 53% of the overall daytime population in the Workplace Zones (compared to 69% in the NEIC area). The percentage daytime working population may be relatively low in the Workplace Zones due to the presence of the 24 education facilities as these students would increase the proportion of the non-working daytime population.

83% of the total non-working population in the Workplace Zones within the Study Area constitutes students, which aligns closely with the 83% non-working student population in the NEIC.

Daytime active workforce in the Study Area is concentrated around the central, southern and south eastern areas, with pockets of high densities of working population evident along major corridors and large facilities (e.g. TU Dublin and Mater Hospital). The industries that the majority of the working daytime population were employed in were 'information, communication and finance' and 'wholesale and retail trade', aligning closely with the census records of employment in 'commerce and trade' and 'professional services'. As expected, education and health and social services industries also employ a substantial amount of people. In comparison, the NEIC industry breakdown is dominated by the 'information and communications, and financial services' industry with large corporations centered in the International Financial Services Centre (IFSC) and surrounding areas.

The social class of workers recorded in the daytime population are closely aligned with the data captured in the 2016 Census for the resident population, with the 'managerial and technical' and 'non-manual' social classes being the most prominent in the Study Area. Again, the NEIC has an even higher percentage of the 'managerial and technical' and 'non-manual' social class workers due to its relative size and influence of the 'information and communications, and financial services' industry.

The changes in 'professional workers' and 'semi-skilled' social classes could indicate the ingress and egress of workers in these labour classes to and from the Study Area. The nationalities of the total daytime population capture an increase of 8% in Irish citizens into the Study Area, with citizens from other EU states and the rest of the world declining by 3% and 4% respectively. Despite the NEIC working population differences in size and industry, the prominent mix of nationalities in the two areas are overall equal, with an ingress of Irish and slight egress of non-nationals from the area during working hours.

Table 22: Employment by industry (Workplace Zones)

Industry	Not stated	NEIC
Agriculture, forestry and fishing	0.1%	0.04%
Manufacturing, mining and quarrying	2%	2%
Construction	3%	1%
Wholesale, Retail Trade	19%	24%
Information and Communication, Financial Services	29%	42%
Public Administration and Defence; Compulsory Social Security	13%	7%
Education, Human Health and Social Work Activities	14%	12%
Other Service Activities	4%	4%
Not stated	16%	8%

Table 23: Employment by social class (Workplace Zones)

Social Class of Workers	Workplace Zones in Study Area	Study Area - Census 2016	Workplace Zones in NEIC
Professional Workers	12%	8%	11%
Managerial and Technical	22%	23%	32%
Non-manual	14%	14%	20%
Skilled manual	10%	9%	8%
Semi-Skilled	8%	10%	7%
Unskilled	4%	5%	3%
All other gainfully occupied and unknown	29%	31%	19%

Table 24: Nationality of daytime population (Workplace Zones)

Nationality	Study Area Daytime Population	Study Area - Census 2016	NEIC Daytime Population	NEIC - Census 2016
Ireland	71%	63%	71%	54%
UK	2%	2%	2%	1%
Poland	3%	3%	3%	3%
Other EU	11%	14%	11%	16%
Rest of the World	10%	14%	10%	18%
Not Stated	4%	4%	4%	7%

References

Fransen, L., del Bufalo, G., Reviglio, E. (2018). Boosting Investment in Social Infrastructure in Europe, Report of the High-Level Task Force on Investing in Social Infrastructure in Europe2018. [PDF File]. Retrieved from: https://ec.europa.eu/info/sites/info/files/economy-finance/dp074_en.pdf

April 2020

Joining Up the Dots

A Socio-Economic and Demographic Profile of

DUBLIN'S NORTH WEST INNER CITY

APRIL 2020

Joining up the Dots - #3

April 2020

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PREPARED AND DESIGNED BY:

Future Analytics Consulting

#3

GRANGEGORMAN LABOUR & LEARNING FORUM, CLOCK
TOWER, GRANGEGORMAN LOWER, DUBLIN 7, D07 XT95.

Tel: +353 (0) 1 402 4262

Email: labourandlearning@ggda.ie

Web: www.ggda.ie

Grangegorman Development Agency | GRANGEGORMAN Labour & Learning Forum | DUBLIN Ollscoil Teicneolaíochta Bhaile Átha Cliath Technological University Dublin | Feidhmeannacht na Seirbhíse Sláinte Health Service Executive | Future Analytics Planning | Research | Economics