

JULY 
2015

Wicklow County Council Socio-Economic Profile

Prepared as part of the LECP



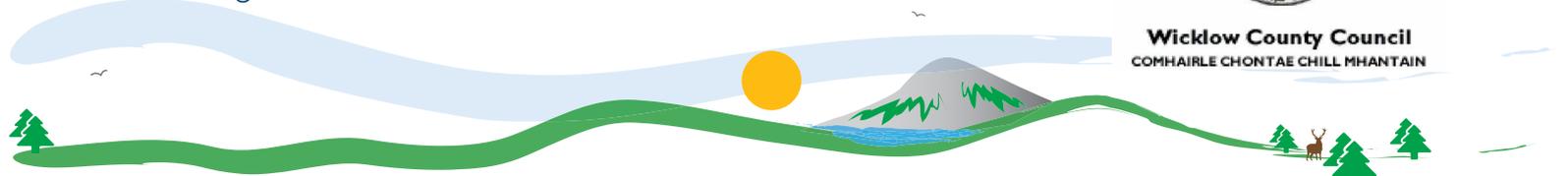
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1 Introduction

This socio economic profile of County Wicklow was commissioned by Wicklow County Council, to inform and support the development of the Local Economic and Community Plan (LECP) for the County.

The LECP is to consist of two distinct but related elements, a Community Plan and an Economic Plan. The community element of the plan is to be developed by the Local Community Development Committee (LCDC) while the economic element of the plan is to be developed by the Local Authority through the SPC. The Wicklow Local Community Development Committee (LCDC) is responsible for developing, coordinating and implementing a coherent and integrated approach to local and community development in the County. The LCDC has a key role in the formulation of the Local Economic and Community Plan (LECP) that will support and steer the social and economic development of County Wicklow over the next six-years.

This socio economic profile of County Wicklow is a key element of the data gathering process and provides the county council with critical data on the socio-economic structure of the County. The aim of this report is to provide Wicklow County Council with an economic profile for the County based on the data from amongst other sources, Census 2011, POWSCAR, Department of Social Protection, GeoDirectory and 2011 Pobal HP Deprivation Index. The profile provides detail on the status of Wicklow in a national and regional context.

This profile analysis builds on work carried out by Wicklow County Council in the County Wicklow Economic Profile (2013) and in data collected in the preparation of the Wicklow County Development Plan 2016-2022.

The socio-economic profile provides data about County Wicklow at a range of spatial scales from Small Area (SA) and Electorate Division (ED) level up to county level, enabling a more detailed depiction of the County's economic character to be described than has been available to date, with comparison drawn to regional and national results where applicable.



2 Wicklow County Socio-Economic Profile

A socio-economic profile of County Wicklow was identified by collating and mapping the latest data from a range of quantitative datasets, including the CSO – Census, POWSCAR, Live Register and Quarterly National Household Survey; Gateways and Hubs Development Index (GHDI) 2012; Fáilte Ireland and Revenue, which together allowed the exploration of themes such as economic activity and performance, employment change, labour quality and connectivity. Where appropriate, the results for Wicklow are compared to regional or national results to provide a degree of relative context in assessing socio-economic performance.

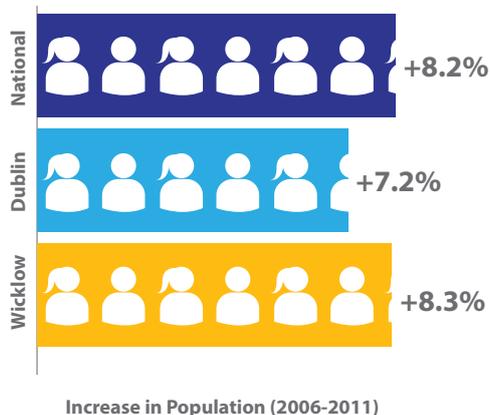
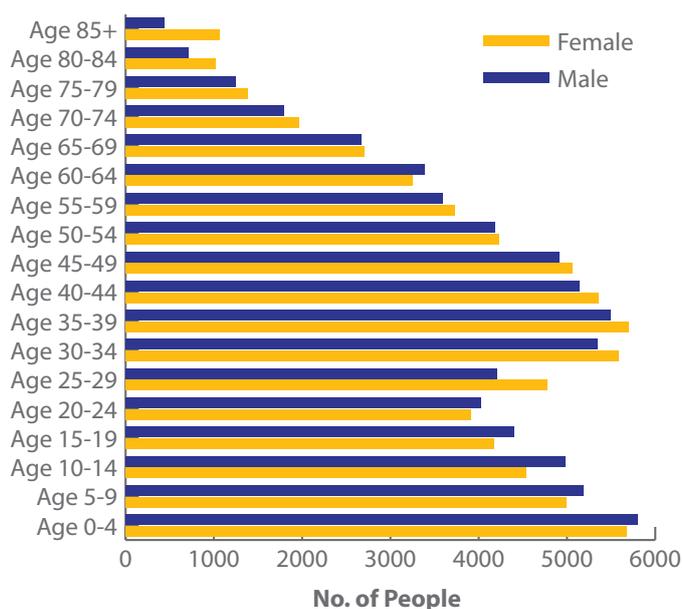
County Wicklow’s geographical proximity to County Dublin and its location within the Greater Dublin Area (GDA) are of key contextual importance in the future socio-economic development of the County. Both the settlement patterns and economic development have been heavily influenced by the construction of key infrastructure, notably the N11 and railway which are located on the east coast. The principal towns in the County (Bray, Wicklow, Arklow) are located on the east coast, while smaller and more rural settlements are located in the centre and west. The extent of commuting has increased significantly over the past two decades, with increased population growth, particularly in the settlements in the north. Due to the topography of the County, connectivity between east and west is relatively poor.

2.1 Population

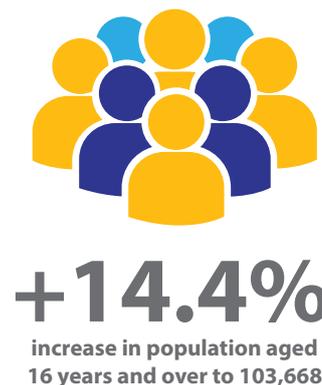
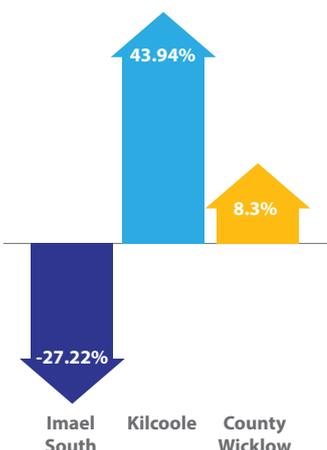
Census 2011 identified that County Wicklow had a population of 136,640, consisting of 67,542 males and 69,098 females.

Between 2006 and 2011, the population increased by 8.3%, identical to neighbouring County Carlow. This rate of increase is similar to that experienced nationally (+8.2%), and 1.2% higher than the population increase in the Dublin region. Upon assessment of the Mid-East region, both counties Kildare and Meath experienced higher increases in population in the 2006-2011 period, with rises of 12.7% and 13% respectively. Overall, Leinster saw a population increase of 9%.

Wicklow 2011 - Age and Population



Areas of greatest increase & decrease in county (2006 - 2011)



Census 2011 identified Bray (legal town and environs) as the fourth largest town in the State with a population of 31,872, with a population density of 3,475 persons per km².

2.1.1 County Settlement Populations

The main settlements in the county (based on the settlement hierarchy set out in the Wicklow County Development Plan 2010-2016) are:

1. Bray
2. Wicklow-Rathnew
3. Arklow
4. Greystones-Delgany
5. Blessington

Of these five main settlement towns, four are located in the east of the County. 57% of the County's population reside in these five main towns.

Table 2-1 Population by Main Settlement

Settlement	Population (2011)
Bray	29,339
Wicklow-Rathnew	13,468
Arklow	13,066
Greystones-Delgany	17,208
Blessington	4,780

2.1.2 Rural - Urban Population



27%
of people are living
in rural areas

This is a decrease from
36.2% in 2006

Census 2011 identified that an increasing percentage of the population in County Wicklow is living in urban areas and currently stands at 73%. Population increases were experienced across all the primary Wicklow growth centres between 2006 and 2011, with Wicklow town and environs having experienced the highest growth at 33.7%, according to Census 2011 data. New housing and population is increasingly being provided in the County's primary and secondary growth centres, in line with government policy.

Census data identifies that the percentage of people living in rural areas (areas outside of the designated towns and villages) now stands at 27%. While the proportion of the County's population living in rural areas has declined, County Wicklow's rural population has experienced an increase in population between 2006 and 2011, albeit at a slower rate than urban areas, with growth of 3.9%.

2.2 Age Dependency Rate

In Wicklow, the total age dependency rate in 2011 was 51%, an increase of 5.2 percentage points between 2006 and 2011. This indicates that there is approximately one young or old person for every two people of working age in County Wicklow. This is due in large to increasing birth rates and people living longer. The increase in County Wicklow was marginally higher than that nationally, which experienced an increase of 3.5 percentage points to 49.3%. Table 2-2 below indicates that County Wicklow has a higher youth dependency than both the Leinster region and the State.

+5.2%
increase in the total age
dependency rate between
2006 and 2011

Table 2-2 Age Dependency Ratio

Group	Wicklow	Leinster	State
Youth dependency 0-14 yrs	34.5%	31.5%	31.9%
Old age dependency 65 years plus	16.6%	15.8%	17.4%
Total (all ages)	51.0%	47.3%	49.3%

Source: CSO, 2011

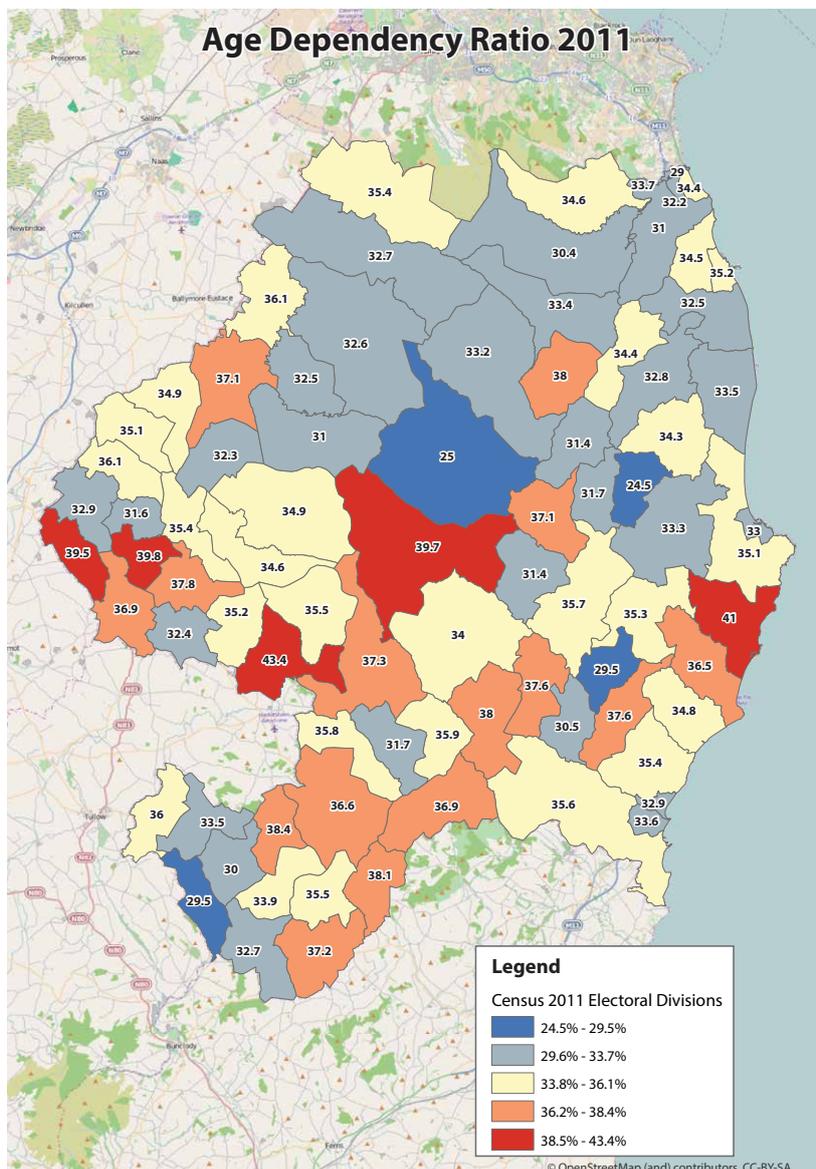


Figure 2-1 Dependency Rates across County Wicklow (Census, 2011)

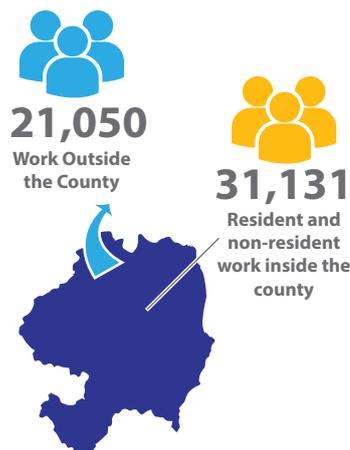
2.3 Labour and Economic Activity

The jobs ratio is a good indicator of measuring the sustainability of settlements (full time employment to working age, i.e. in the population range 16-64 years). Full-time employment fosters higher income levels, promotes household formation and increased consumption. The present Wicklow employment-to-population ratio is 42% which reflects the poor economic conditions of recent years arising from the economic recession.



2.4 Inward and Outward Commuting

Analysis of the 2011 Census data identifies there were 136,340 people resident in Wicklow, of which there is a labour force of 65,581. Data obtained during the formulation of this report confirms that there is a large component of County Wicklow residents (21,050 persons) that are commuting out of the County for employment. An in depth analysis of both inward and outward commuting patterns is carried out in Section 2.6.



2.5 Infrastructure

2.5.1 Transportation Infrastructure

2.5.1.1 Road



The principal transportation routes in the county are the N11/M11 which serves the eastern side of the County, and the N81 in the west of the County. The main routes serving the east-west are the R756 and R759. The National Spatial Strategy (NSS) identifies the N11 – M11 as a ‘Strategic Radial Corridor’ from Dublin to the south-east of the country, while this route is described as a ‘Multi-Modal Transport Corridor’ in the Regional Planning Guidelines (RPG). These serve as the principal access routes to the county.

The N11 / M11 route is part of Euroroute 01 and has been subject to significant investment. The recently completed Rathnew to Arklow Road Improvement Scheme (PPP scheme) forms part of a 280 km long continuous dual carriageway or motorway between Clogh in County Wexford and Belfast. The second national route in Wicklow, the N81, is not identified in the NSS or the RPGs as being of strategic or regional significance. From an investment perspective, the N81 has only undergone minor improvements over the last 20 years.

The RPGs also identify the Leinster Outer Orbital Route, traversing the region from Arklow in the south-east, to the Naas-Kilcullen area in the west via a route similar to the existing R747–N81 corridor. The NRA has undertaken separate studies in the context of long term planning of such a route. The National Transport authority’s draft transport strategy 2011-2030 for the greater Dublin Area, published in April 2014 states in relation to the Leinster Orbital Route that “the full development of the proposal is unlikely to be required during the strategy period and accordingly, it is recommended that an incremental approach to its delivery is adopted”.

Car dependency within the County is high, particularly for commuting purposes. Census 2011 data informs that 47.8% of all Wicklow households have two or more cars. Table 2-3 presents data derived from the NRA on the national routes of the M11/N11 and N81 showing average daily traffic volumes at these selected junctions for 2014.

Table 2-3 NRA Traffic Data on M11/N11 and N81 - AADT¹ and %HGV²

Road Network	Junction	2014	
		AADT	% HGV
M11	M11 Between M50/M11 and Bray North Jn, Bray, Co. Dublin	72,451	2.4
M11	M11 Between Bray North and Fassaroe Jn, Co. Wicklow	63,989	2.7
N11	N11 Between Kilmacanogue and Delgany Jn, Co. Wicklow	45,783	2.9
M11	M11 Between Jn16 and Jn17, Rathnew/Wicklow, Co. Wicklow	28,174	3.8

¹ AADT is an estimate of the mean daily traffic volume over the course of a year

² % HGV figure indicates the percentage of heavy goods vehicles from recorded data. Articulated and Rigid Trucks are classified as HGVs

Road Network	Junction	2014	
N11	N11 Jack Whites, North of Arklow, Co. Wicklow	11,683	5.7
N11	N11 North of Arklow Bypass, Arklow, Co. Wicklow	17,529	5.4
M11	M11 Between Jn21 and Jn22, Arklow, Co. Wicklow	15,477	5.2
M11	M11 Between Jn22 and Jn23, Gorey, Co. Wexford	10,809	6.1
N81	N81 Between Blessington and Tallaght, South of R114 Jn, Co. Wicklow	10,551	4.1
N81	N81 Between Hollywood and Baltinglass, Donard, Co. Wicklow	3,349	3.9

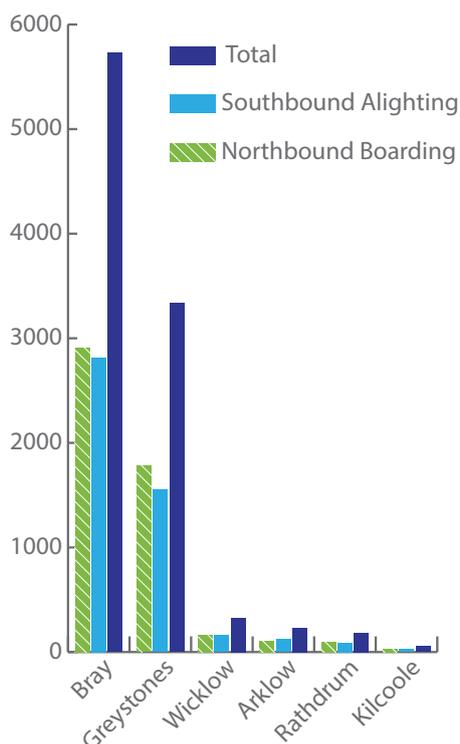
Source: National Roads Authority

There is no dedicated N11 traffic counter north of Junction 5, however, it is estimated that the approach to the N11 from the Loughlinstown direction possesses an AADT figure of 30,435 vehicles. There are also important regional roads that link into the N11/M11 at various junctions, which have high AADT volumes. These are as follows:

Road Network	Junction	AADT 2012 ^{Note 1}
R761	Bray Main Street (North-south direction / DLR to Greystones)	16,870
R767	Killarney Road to Jn7 (Bray South)	9,940
R768	Bray Southern Cross to Jn 7 (Bray South)	13,416
R774	Farrankelly Road to Jn11 (Greystones South)	13,060
R772	Jn16 Wicklow North	15,316
R772	Jn21 Arklow South	14,383

Note 1: Measured as part of 2012 Noise Mapping Exercise by Wicklow County Council

Commuters



2.5.1.2 Rail

The east coast of the county is also served by the Dublin-Rosslare railway line, while in the north of the county, the DART serves the settlements of Bray and Greystones.



There are approximately forty trains serving Greystones to Dublin city centre daily with similar number of services running from Dublin city centre to Greystones daily.

There are approximately seventy-nine weekday DART services between Bray and Dublin City centre daily, with similar number of services running from Dublin city centre to Bray daily.

The Rail Census 2013 (conducted on 14 November 2013) identified that the busiest train on the day of the Rail Census 2013 nationally was the 08:00 hours DART from Greystones to Malahide, with 1,444 passengers. This was also identified as the busiest train in the Rail Census 2012.

Fig 2-2 County Wicklow Railway Commuting Patterns

There are five trains which operate from Rosslare Europort to Dublin City centre daily, and serve Arklow, Rathdrum, Wicklow, Kilcoole, Greystones and Bray stations en route.

Based on data from the Rail Census 2013, approximately 5,700 passengers pass through Bray railway station daily, with over 80% of passengers availing of the DART services. Approximately 3,300 use Greystone's railway station daily, with over 90% availing of the DART services. Below are the passenger figures for County Wicklow railway stations taken during Rail Census 2013.

2.5.1.3 Bus



Figure 2-3 Public Transport Routes within County Wicklow

Bus Éireann provide services to County Wicklow linking the county with Dublin City Centre (including the IFSC) and Dublin Airport, and Rosslare Europort.

Bus Éireann operates approximately twenty-two services (Route 133) on weekdays between Dublin Airport and Wicklow, serving Dublin City centre, Bray, Kilmacanogue, Kilpedder, Newtownmountkennedy, Newcastle, Ashford, Rathnew and Wicklow. Bus Éireann also operates two services (Route 133) each way Monday to Saturday and one service on a Sunday from Wicklow Town to Arklow, servicing Rathnew, Glenealy Rathdrum, Avoca and Woodenbridge en route.

Bus Éireann also operates a service (Route 132) that serves that runs from Dublin to Enniscorthy, serving the west of the County Wicklow. Route 132 operates five services Monday to Friday from Enniscorthy to Dublin return (with an additional service on Thursdays), two services on Saturdays and three services on Sundays. This route serves west Wicklow towns of Blessington and Baltinglass. On Thursday only, there is a service extending from Bunclody to Rosslare Europort

Bus Éireann operates a service (Route 384) that serves that runs from Gorey to Dublin via Arklow. This service is primarily a Gorey to Dublin (Busáras) commuter service and operates once a day in each direction, and operates Monday to Friday only.

The St. Kevin's Bus operates a bus services that runs twice-daily from Glendalough to Dublin city centre. En route it serves Laragh, Annamoe, Roundwood, Ballinastow, Calary, Long hill, Kilmacanogue and Bray.

Dublin Bus serves the north east and northwest of the county with a number of routes connect the County with the city. Routes 145 and 45a serve Bray to Dublin City centre and Dún Laoghaire respectively, while the route 84 bus, operates between Newcastle and Blackrock, serving Greystones and Kilcoole en route. Enniskerry is connected to both Bray and Dublin City centre by route 185 and route 44 respectively. Dublin Bus route 65 operates between Blessington and Dublin City centre, via Tallaght and Rathmines.

Figure 2-3 presents the public transport routes located within County Wicklow showing the main road, bus and rail routes serving the county.

2.5.1.4 Maritime

There are two ports in Wicklow that have their own Harbour Commissioners, namely Wicklow and Arklow. CSO data (2014) indicates that the number of arrivals and the gross tonnage of vessels to ports in County Wicklow have been declining. In 2013, the total tonnage of goods handled by Wicklow Ports was 155,000 tonnes, of which 142,000 tonnes (approximately 70 arrivals) were handled in Wicklow Port, and all of which was conducted within the European region. Table 2-4 shows the tonnage of goods handled by Wicklow Port over the period 2009 to 2013. As identified, there has been a 35% decrease in port activity over this period. Over the same period, only 13,000 tonnes were handled in Arklow Port (nine arrivals), all of which occurred in 2013.

Table 2-4 Tonnage of Goods Handled by Wicklow Port from 2007-2013

	2007	2008	2009	2010	2011	2012	2013
Goods Received	221,000	85,000	53,000	48,000	30,000	28,000	21,000
Goods Forwarded	-	-	20,000	41,000	69,000	46,000	121,000
All Goods Handled	221,000	85,000	73,000	89,000	99,000	74,000	142,000

Wicklow’s proximity to Dublin and Rosslare allows access to a number of main international ports (Dublin Port, Dún Laoghaire Harbour and Rosslare Europort), providing international access.

2.5.1.5 Air

Wicklow’s strategic location south of Dublin enables good access to Dublin Airport via the N11/M11, N81 and M50.

2.6 Means of Transport to Work, School or College

From the analysis of the patterns of transport to places of employment, school or college from the 2011 Census (the POWSCAR database), it is observed that there is a high reliance on private transport within the county. A significant proportion of Wicklow residents are employed outside of the county (21,050 persons), 88% of whom are commuting to County Dublin. Limited public transport linkages in some parts of the county has generated an over-reliance on the private car as the primary means of transport.

Mode of Transport to Work, School or College (Census 2011)

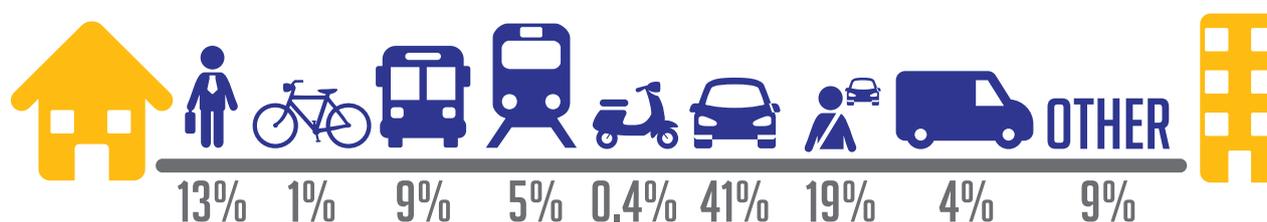


Figure 2-4 Mode of transport to Work, School or College (Census, 2011)

Data from Census 2011 informs that the most common means of travelling to work by County Wicklow residents is private car, with this mode accounting for approximately 61% of all journeys. 4,748 persons commuted using public transport (bus or rail).

Table 2-5 Wicklow Mode Type and Numbers Commuting to Work, School or College

Destination	Not at work, school or college	On foot	Bicycle	Bus, minibus or coach	Train, DART or LUAS	Motor cycle or scooter	Private car	Passenger in a car	Van	Other, including lorry	Grand Total
Dún Laoghaire-Rathdown	22	68	62	431	386	45	6,300	325	191	26	7,856
Dublin City	25	49	50	718	2,092	111	4,187	182	135	8	7,557
South Dublin	9	8	3	44	14	14	2,208	64	170	17	2,551
Kildare	4	6	-	4	4	5	886	16	60	10	995
Wexford	4	3	-	9	1	1	497	15	39	6	575
Fingal	1	3	-	15	15	7	480	7	31	3	562
Carlow	4	2	-	2	-	2	411	15	36	5	477

The National Transport Authority commission Iarnród Éireann to conduct an annual National Census of Rail patronage to record information on boardings and alightings of passengers at every train station in the country on one day of the year, which provides a detailed and reliable snap-shot of rail usage across the network nationally. Data from the Rail Census 2013 identifies that the busiest stations for boardings and alightings in the country were dominated by Dublin City stations however Bray Station ranks seventh in the country in terms of daily passenger boardings (2,909 passengers) and ninth in passenger alightings (2,818 passengers). The Rail Census also states 'Bray, by exception exhibited a high level of daily journeys relative to its population density. This is evidence that the catchment area for Bray station is much wider than the parameters of Bray town.

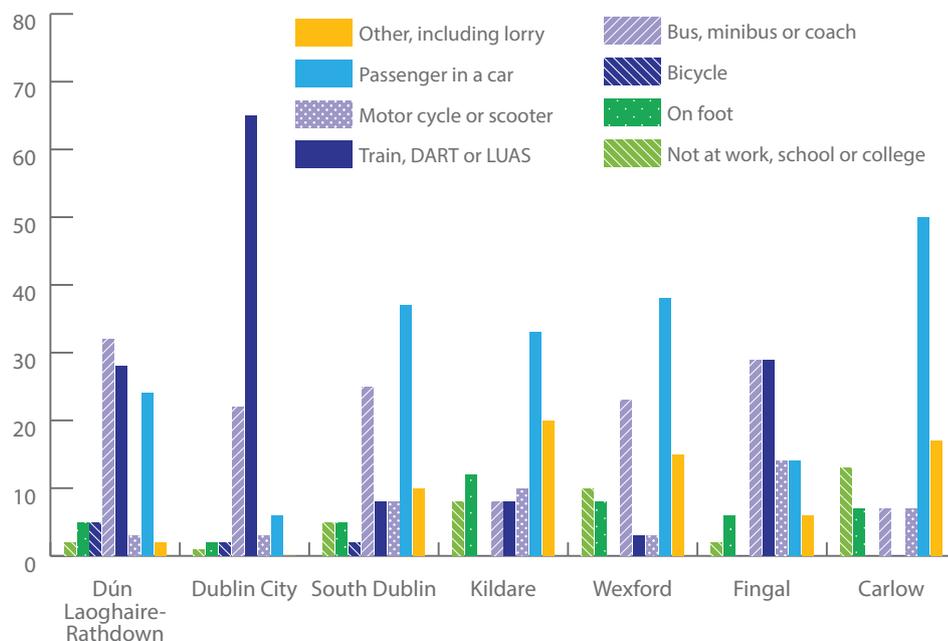


Figure 2-5 Percentage of Wicklow Persons Using Transport other than Private Car as Means of Travel To Work

2.6.1 Journey Time to Work, School or College

The average journey time was 32 minutes and 39% of workers faced a commuting time in excess of 30 minutes.

2.7 Broadband and Internet



Figure 2-6 Comparison of Broadband Access

Data Source: Census 2011

Figure 2-6 shows that broadband access within the county is above the national rate with 68.7% of households having broadband connectivity, compared to 63.8% of households nationally. The settlements of Bray, Greystones, Kilcoole/Newtownmountkennedy, Wicklow and Arklow have access to high speed broadband services. However there are large areas of the County where there are inadequate broadband facilities, including Tinahely and Baltinglass. In more rural areas, the low population density in certain parts of the county poses a problem for broadband suppliers.

The Department of Communications, Energy, and Natural Resources (DCENR) has launched the National Broadband Plan initiative 'Delivering a Connected Society – A National Broadband Plan for Ireland' (2014); the objective of which is to provide high speed broadband access to all premises nationally and address the 'digital divide' that has emerged since the commencement of commercial investment. The initiative will be delivered through combined State and commercial investment. Commercial investment of €2.5bn is anticipated to provide high speed broadband to approximately 1.6 million premises, out of a total of 2.3 million premises nationally, consequently covering 70% of premises by 2016. State-led intervention aims to ensure that all premises nationally are addressed; thereby covering the remaining 30% of premises nationally that commercial investment has not covered.

In County Wicklow, the following locations have been identified as preliminary locations to be connected by fibre broadband as part of the State and commercial intervention under the NBP. This list is subject to revision upon completion of the comprehensive national mapping process that is currently underway by the Department of Communications, Energy, and Natural Resources.

Table 2-6 County Wicklow locations identified under the NBP

1.	Askanagap	2.	Ballinglen
3.	Ballyconnell	4.	Ballycoog
5.	Coolboy	6.	Coolkenna
7.	Glenree	8.	Grange Con
9.	Hollywood	10.	Knockananna
11.	Knockanarrigan	12.	Moyne
13.	Rathdangan	14.	Redcross
15.	Stratford		

Figure 2-7 below shows the extent to which commercial operators and the State will be covering in County Wicklow. The amber colour represents areas that will be targeted by the National Broadband Plan and the blue areas represent the areas that the commercial operators will cover, by year end 2016.

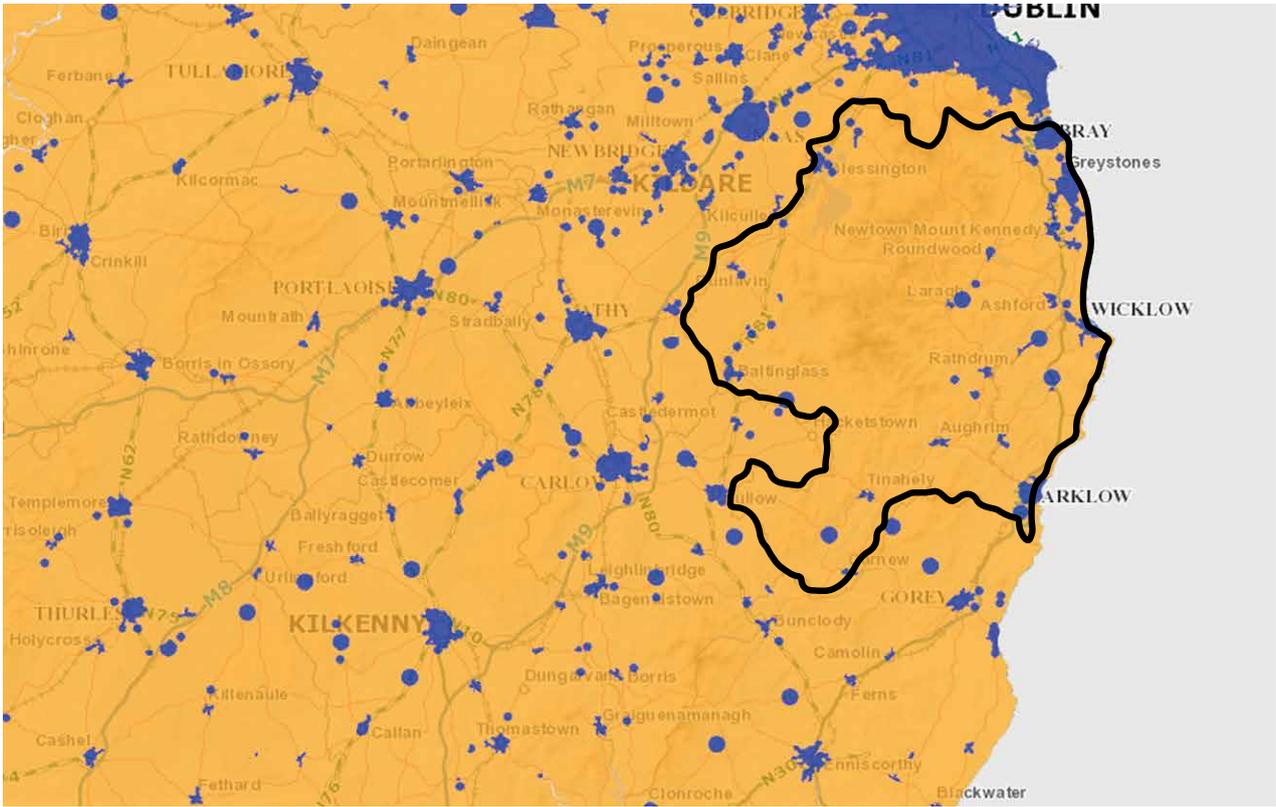


Figure 2-7 Broadband investment from commercial and State investment under the National Broadband Plan in Co. Wicklow
(Source DCENR)

2.8 Local Services

The An Garda Síochána stations and post offices have been mapped to show the distribution of these services within the county, see Figures 2-8 and 2-9 below.

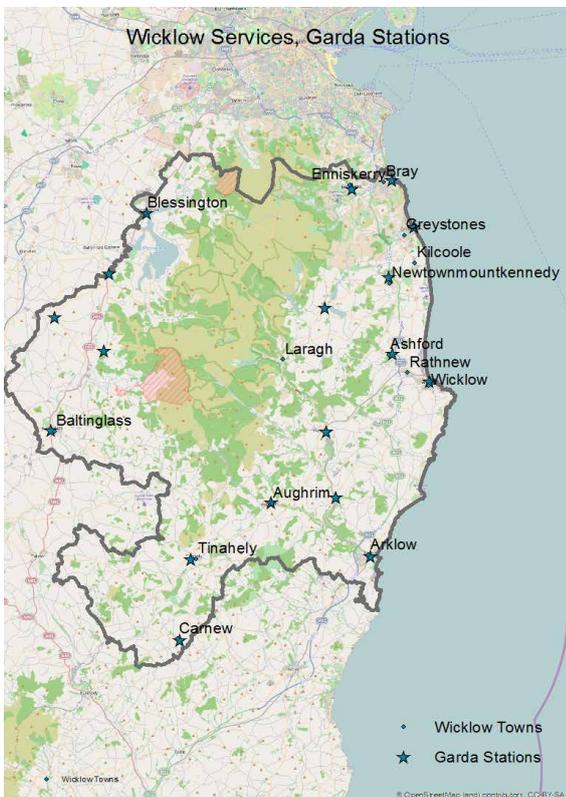


Figure 2-8 Location of An Garda Síochána Stations in County Wicklow

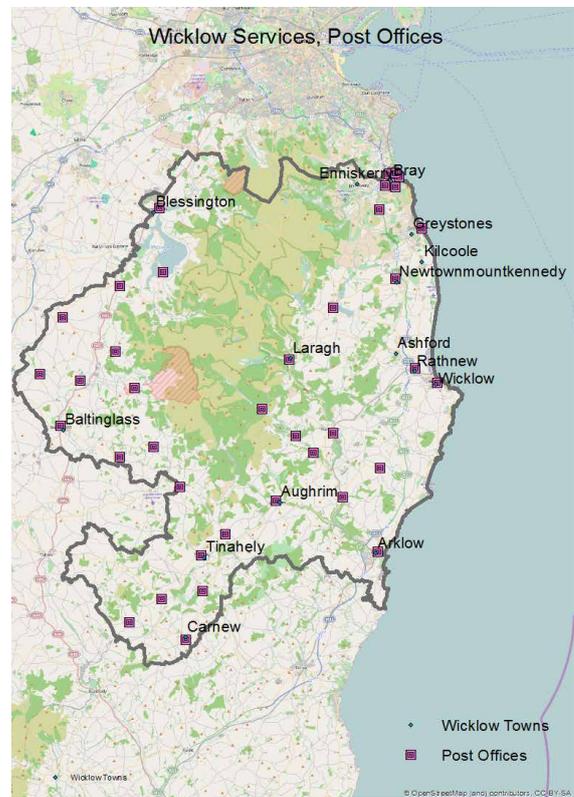


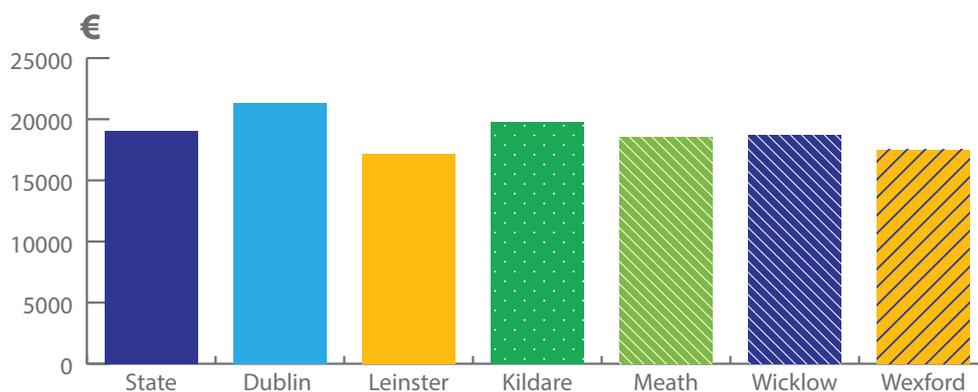
Figure 2-9 Post Offices located in County Wicklow

2.9 Disposable Income



Census 2011 data identified that the estimated disposable income of Wicklow residents was €18,754 per capita, compared to the State average of €19,055 and the Dublin average of €21,329 per capita. Figure 2-10 shows the disposable income levels across selected counties in the Leinster region, in addition to the State and regional average. Disposable incomes in Dublin are 11.9% above national average. Wicklow has the third highest disposable income level in the Leinster region after Dublin and Kildare, and is marginally higher than Meath (€18,563). Wicklow's disposable income level is €1,229 higher than in neighbouring Wexford (€17,525).

Figure 2-10
Disposable
Income levels of
County Wicklow's
Neighbouring
Counties, Census
2011



The latest report from the CSO 'Earnings and Labour Costs

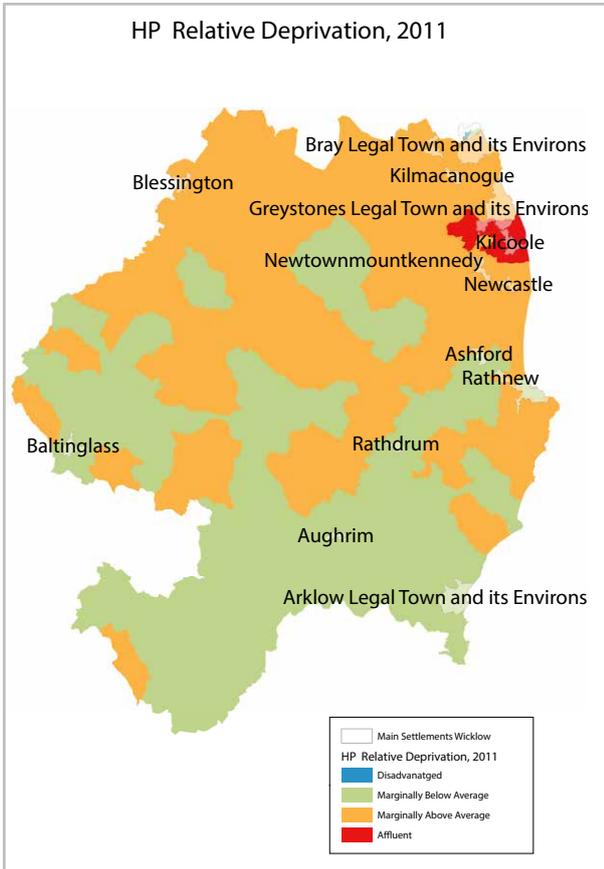
Quarterly Q4 2014 (final Q1 2015 (Preliminary Estimates)' indicate that nationally, weekly earnings were €702.06 in Q4 2014 and showed an increase of 1.9% over the same period in 2013. Latest findings also identifies that the average weekly earnings increased in five of the thirteen sectors in the year to Q1 2015, across the economic sectors. The largest percentage increase was identified to be in the Information and Communication sector (+5.8%) from €1,037.21 to €1,097.48. The largest percentage sectoral decrease was recorded in the Financial, Insurance and Real Estate sector which saw weekly earnings decrease from €1,111.19 to €1,059.44 (-4.7%). Over the 4 year period Q1 2011 to Q1 2015 average weekly earnings across individual sectors show changes ranging between -7.1%, for the Human Health and Social Work sector decreasing from €717.64 to €666.37, and +15.3%, for the Information and Communication sector increasing from €952.16 to €1,097.48.

2.10 Affluence and Deprivation

Using data derived from the 2011 Pobal HP deprivation Index, this report analyses the latest deprivation indices. Wicklow is located within the Mid-East Region, which is the second most affluent region nationally and County Wicklow is the second most affluent local authority area within the Mid-East region. The 2011 Pobal HP Deprivation Index Absolute Deprivation score shows the extent to which the County was impacted as a result of the economic recession. The absolute deprivation score fell from 1.3 in 2006 to -5.9 in 2011, representing a decline of 7.2 points. This is greater than the national fall which was 6.5 and identifies that the County was significantly adversely affected by the economic recession.

In general, County Wicklow is not characterised by extremes, either with regard to affluence or deprivation. Of the 82 Electoral Divisions (EDs) in County Wicklow, 43 EDs are marginally below and 37 marginally above average affluence or deprivation levels. The most disadvantaged ED in the County is Rathmichael (Bray) (-15.0 score) and this is the only ED in the County which is in the category of 'disadvantaged'³. All remaining 81 EDs in the County are identified

3 'Disadvantaged' category refers to an area with a relative index score within the range of -10 to -20



to be at most, marginally below the national average. However, at Small Area (SA) level, there are more significant differences in affluence and deprivation within settlement areas, as shown in the settlement profiles.

The most affluent areas are situated in the northeast, and the most affluent EDs in the county are Kilcoole (10.2), Powerscourt (9.9), Enniskerry (9.6), Greystones (9.4) and Delgany (8.5). Figure 2-11 shows the relative deprivation levels of the county, based on ED. The analysis shows the significant difference between the north of the county and the southern areas of the county in terms of deprivation levels.

Figure 2-11 HP Relative Deprivation 2011 at ED Level

2.11 Affluence and Deprivation by Settlement

The following section presents the affluence and deprivation levels in the five main settlement towns in County Wicklow.

2.11.1 Bray

Bray is the largest urban settlement in County Wicklow. Figure 2-12 shows the extent to which the settlement of Bray is varied in terms of affluence and deprivation, with a mix of both disadvantaged and affluent residential areas within close proximity of each other. Rathmichael (Bray) ED (located in the northwest of the town) is the most disadvantaged ED in County Wicklow with a relative index score of -15.0, making it the only ED in the County categorised as 'disadvantaged'. Rathmichael (Bray) ED also has the highest concentrations of local authority housing in Wicklow with 45% of the population living in supported housing while local authority rented housing accounts for 24% of housing in Bray No. 1. ED (located southeast of Rathmichael ED), both of which are identified very high by national comparison. These areas comprise high levels of unemployment, in addition to a high proportion of the population with primary education only.

Figure 2-12 Bray Small Areas Deprivation Levels 2011



2.11.2 Wicklow-Rathnew

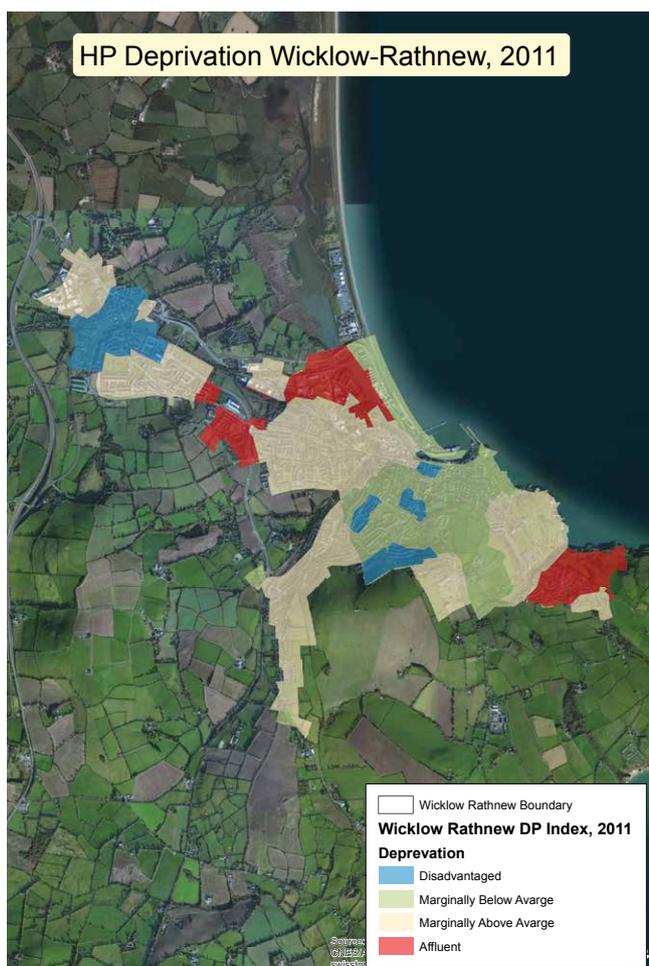


Figure 2-13 shows the extent to which the settlement of Wicklow-Rathnew is varied in terms of affluence and deprivation, with the Pobal HP Index ranging from very disadvantaged to affluent.

Figure 2-13 Wicklow-Rathnew Small Areas Deprivation Levels 2011

The settlement of Wicklow-Rathnew has a high proportion of disadvantaged, notably within the Merry Meeting area of Rathnew (Small Area ID 257077011 within Wicklow Rural ED). This Small Area (SA) has a Pobal HP Index of -22.5 signifying it is classified as very disadvantaged. This area which has a population of 402 persons, has a high unemployment rate (67.5% male and 47.5% female), while the proportion of the population with primary education attainment only is 37%. To the immediate north and west of this SA are other SAs within the Ballybeg townland, which are categorised as 'disadvantaged'. Within Wicklow Town centre (Wicklow Urban ED), there are five SAs that are categorised as disadvantaged. There are a number of SAs to the north and southeast of the settlement area that are categorised as affluent. These areas have a higher rate of residents with a third level qualification and lower unemployment levels.

2.11.3 Arklow

Figure 2-14 illustrates the manner in which the settlement of Arklow is categorised in terms of affluence and deprivation. Very prevalent is the substantial area in the centre of the settlement town that is categorised as 'very disadvantaged' and 'disadvantaged' (located within Sheepphouse / Knockanrahan Lower and Abbeylands areas, all of which are located in Arklow No. 1 Urban ED); of the Pobal HP Index scores range from -20.3 to -22.8 points). There is also an area north of the town within the Tiknock area that is categorised as 'disadvantaged' (Pobal HP Index score of -17.3 points). Within these areas, there is a high rate of unemployment and a high proportion of the population possess only a primary level education. A high proportion of the population within these areas are also living in local authority rental accommodation. As evident from Figure 2-14, a large proportion of the Arklow settlement town is categorised as 'marginally below average', however there are small pockets of the both Arklow No. 1 Urban ED and Arklow No. 2 Urban ED that are categorised as 'marginally above average'. In these areas, unemployment levels are lower and a higher proportion of the population have a third level education.



Figure 2-14 Arklow Small Areas Deprivation Levels 2011

2.11.4 Greystones-Delgany

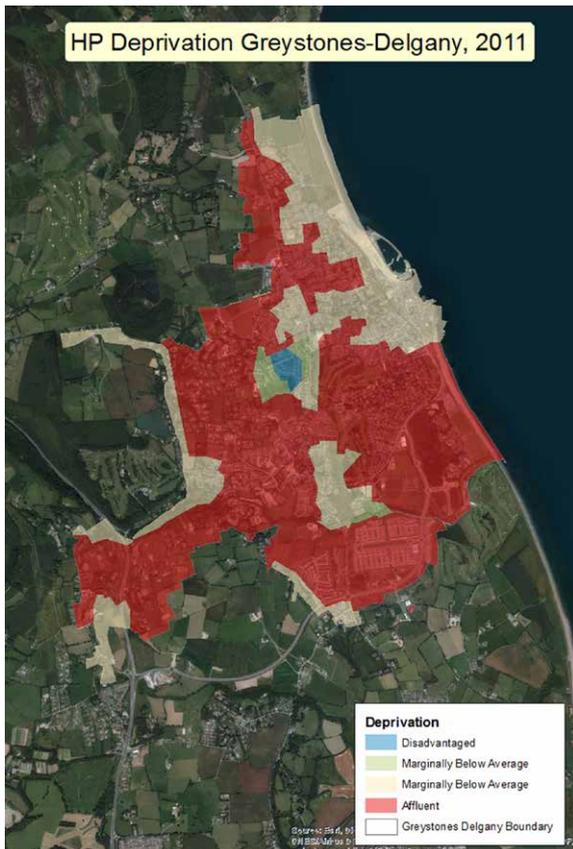


Figure 2-15 Greystones-Delgany Small Areas Deprivation Levels 2011

Greystones-Delgany lies within one of the most affluent EDs in the county with a significant concentration of areas within this settlement area described as 'affluent' or 'very affluent'. This settlement area possesses a high level of third level education population, with in excess of 60% of the population possessing a third level qualification in some areas of this settlement area. Unemployment within these areas is characteristically low.

However, there are a number of small areas (ED Delgany) within this settlement catchment that are categorised as both 'marginally disadvantaged' and 'disadvantaged'. Unemployment levels within these areas is higher, while the proportion with third level qualifications (ranging from 11% to 19.9%) is substantially lower than surrounding Small Areas. For example, in the Small Area directly south, 67.1% of the population has a third level qualification and unemployment levels are significantly lower (1.5% in males, and 7.5% in females).

2.11.5 Blessington

As presented in Figure 2-16, a large area of the Blessington settlement area is categorised as marginally above average. There are a number of areas to the north and centre of the town that are categorised as 'marginally below average' while one SA is categorised as disadvantaged. Within these areas, unemployment levels are higher than surrounding Small Areas and a greater proportion of the population are residing in local authority rented accommodation. The level of people with primary education attainment only is also higher in these areas.

One Small Area within the Blessington ED is categorised as 'affluent'. Here the proportion of the population unemployed is lower than surrounding Small Areas (11.1% in males and 9% in females), and the proportion with a third level education is 29.5%, which is lower than other small areas within the county categorised as 'affluent'.



Figure 2-16 Blessington Small Areas Deprivation Levels 2011

Second Level Education and Training Centres

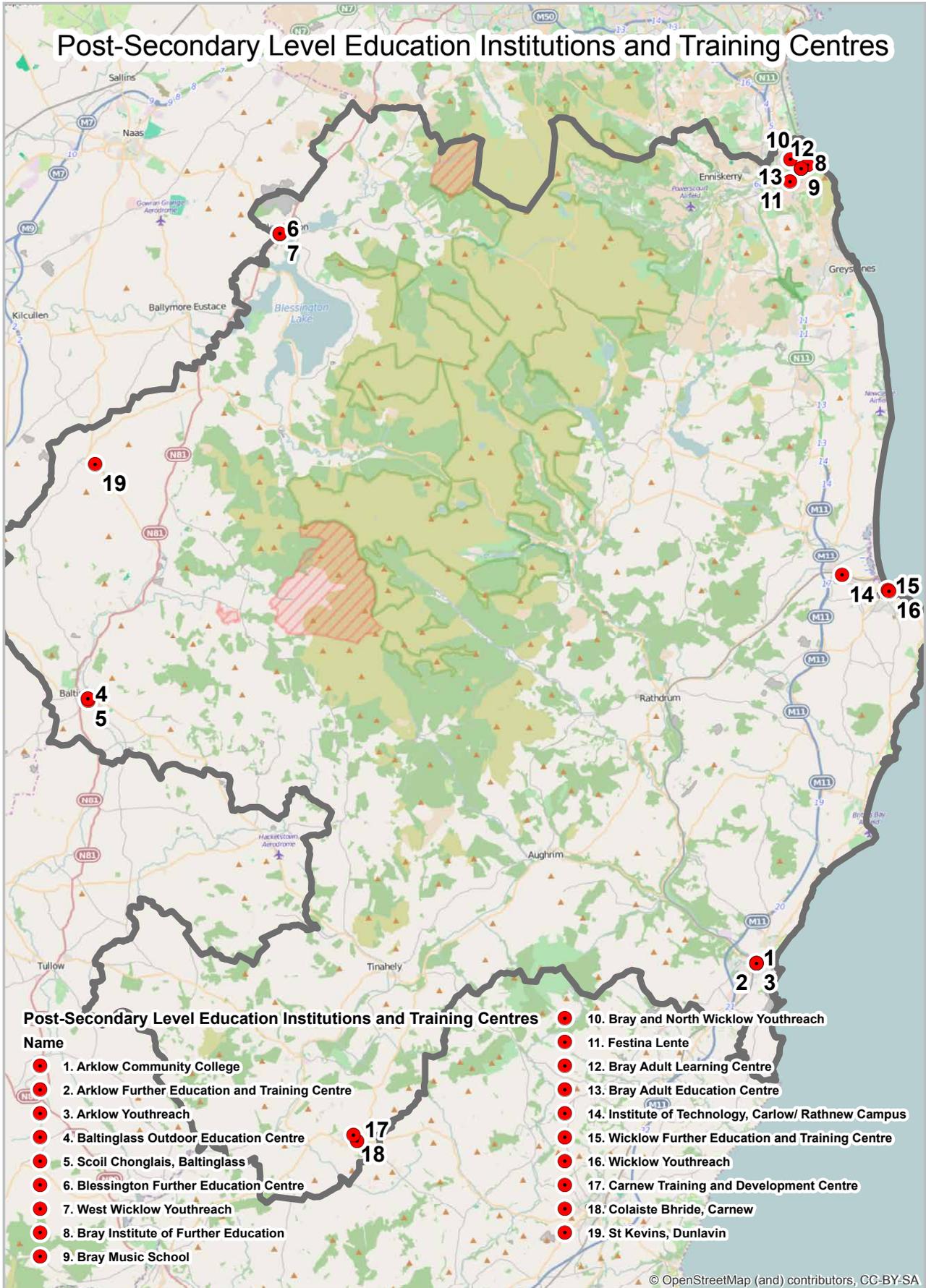
County Wicklow is advantageously positioned in close proximity to Dublin and Carlow providing it with access to high quality educational institutions. The Institute of Technology, Carlow has established a Wicklow campus in Claremont, Rathnew which provides access to a varied range of undergraduate and post-graduate part-time programmes in the areas of Business, Accounting and Law; Engineering and Social Sciences. Course places are also available in the IT Carlow Claremont campus, under the Higher Education Authority's Springboard Initiative.

The County also possesses a number of adult further education and training centres, managed and operated by Kildare and Wicklow Education and Training Board (KWETB), largely located in the main settlements of Bray, Wicklow Town, Arklow, Blessington, Baltinglass and Carnew. In addition Post Leaving Certificate courses are operated from some secondary schools in the County. Further Education and Training provision operated by KWETB includes:

- Adult Basic Education Programmes in Arklow, Carnew, Bray, Wicklow Town and West Wicklow.
- Community Education Service operating throughout Co. Wicklow
- Adult Guidance service operating out of Centres in Bray, Wicklow Town, Arklow and Blessington.
- Back to Education Initiative Programme in Arklow, Carnew, Bray, Wicklow Town and West Wicklow.
- Post Leaving Certificate Courses in Bray Institute of Further Education, Glenart College (formerly Arklow Community College), Scoil Chonglais, Baltinglass, Colaiste Bhríde, Carnew and St Kevin's Community College, Dunlavin.
- Prison Education in Shelton Abbey, Arklow.
- YouthReach Programme for early school leavers in Arklow, Bray, Wicklow Town and West Wicklow.
- Vocational Training Opportunities Scheme in Arklow, Carnew, Bray, Wicklow Town and West Wicklow.
- Part-time evening courses in Bray, Wicklow Town and Blessington.
- Skills for Work Programme
- Bray Music School
- Baltinglass Outdoor Education Centre

The imminent transfer of responsibility for training delivery will mean KWETB will also have responsibility for a wider range of training including specific skills training, traineeships, local training initiatives, special training programmes and community training. Figure 2-17 presents the post-second education and training centres that are located within County Wicklow.

Post-Secondary Level Education Institutions and Training Centres



2.12 Post-Figure 2-17 Figure 2-17

Post-Second Level Education and Training Facilities in County Wicklow

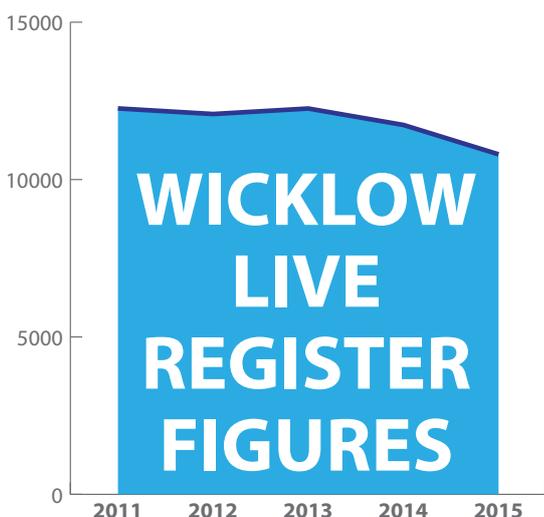
2.13 Unemployment

Data from the CSO states that the standardised unemployment rate (SUR) nationally in April 2015 was 10.0%, representing a 1.6 decrease on April 2014.

Craft and related (19.9%) remained the largest occupational group on the Live Register in April, despite the fact that the number in the group fell over the year by 12,226 (-15.2%) to 68,368. The second largest occupation group on the Live Register was Plant and machine operatives, which currently stands at 56,529 (-12.1% since April 2014)

The second largest annual percentage decrease was in the Clerical and secretarial group (-14.2%). The two smallest occupational groups in April were the Associate professional and technical and the Managers and administrators groups which accounted for 2.8% and 4.4% of the Live Register respectively.

2.14 Live Register



The Live Register is compiled from returns made directly to the CSO by each of the local offices⁴ of the Department of Social Protection. It is not specifically designed to measure unemployment. However, it provides an invaluable short-term trend indicator of unemployment. Included on the Live Register are the following:

- All those on Jobseekers Benefit (JB) - excluding systematic short-time workers;
- All those on Jobseekers Allowance (JA) - excluding smallholders/farm assists and self-employed persons;
- Part-time workers (those who work up to 3 days per week), seasonal and casual workers entitled to Jobseekers Allowance or Benefit; and
- Those signing on for 'PRSI credits' but receiving no payment.

Most recent CSO data indicates that the number of people in County Wicklow on the Live Register has declined and is now at a level of 10,420 (March 2015). This represents a fall in persons on the Live Register of 1,166 or 10.0% since March 2014. This rate of decline is very similar to the national trends over the same period, which experienced a decline of 10.8%.

2.14.1 Live Register Age Groups

Nationally, in the year to April 2015 the number of persons aged 25 and over on the Live Register decreased by 33,617 (-10.1%), and the number of persons aged under 25 decreased by 11,391 (-19.9%). Annual decreases in persons aged under 25 have occurred in all months since July 2010, while the number of persons aged 25 and over have fallen annually in all months since July 2012. The percentage of persons aged under 25 on the Live Register now stands at 13.3% for April 2015, down from 14.7% in April 2014 and 15.6% in April 2013.

Table 2-7 Persons on the Live Register by Region and Sex

NUTS2 and NUTS3 Regions	April 2014	April 2015	Annual Change	Under 25 Years	25 Years & Over
Males					
Border, Midland and Western	73,721	64,272	-9,449	8,675	55,597
Border	33,584	29,314	-4,270	4,047	25,267

4 Individuals registered at specific DSP local offices may not necessarily reside within their immediate environs

NUTS2 and NUTS3 Regions	April 2014	April 2015	Annual Change	Under 25 Years	25 Years & Over
Midland	18,973	16,600	-2,373	2,360	14,240
West	21,164	18,358	-2,806	2,268	16,090
Southern and Eastern	165,820	144,032	-21,788	18,656	125,376
Dublin	60,143	51,990	-8,153	6,913	45,077
Mid-East	22,723	19,838	-2,885	2,685	17,153
Mid-West	19,842	16,837	-3,005	2,242	14,595
South-East	31,581	27,939	-3,642	3,734	24,205
South-West	31,531	27,428	-4,103	3,082	24,346
Total	239,541	208,304	-31,237	27,331	180,973
Females					
Border, Midland and Western	47,608	43,662	-3,946	6,257	37,405
Border	21,318	19,573	-1,745	2,857	16,716
Midland	12,276	11,394	-882	1,810	9,584
West	14,014	12,695	-1,319	1,590	11,105
Southern and Eastern	101,410	91,585	-9,825	12,269	79,316
Dublin	34,386	30,938	-3,448	4,117	26,821
Mid-East	15,170	13,899	-1,271	1,845	12,054
Mid-West	12,631	11,153	-1,478	1,575	9,578
South-East	19,373	17,763	-1,610	2,671	15,092
South-West	19,850	17,832	-2,018	2,061	15,771
Total	149,018	135,247	-13,771	18,526	116,721

Source: CSO, 2015

Table 2-7 indicates that there was a 12.7% decrease in males and 8.3% decrease in females on the Live Register in the Mid-East region (which includes Wicklow) between April 2014 and April 2015. Figures for Dublin were similar to the Mid-East over the same period, however the decreases were slightly larger in the Dublin region with a 13.5% fall in males in the Live Register and 10% fall in females over the same period.

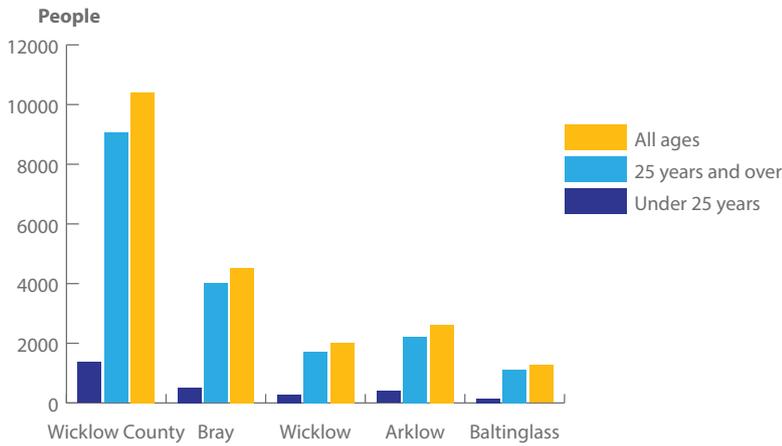
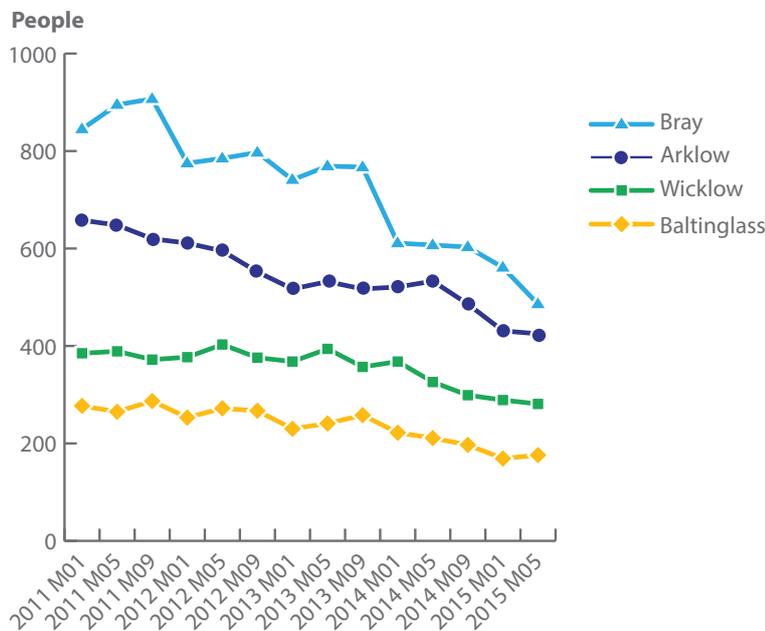


Figure 2-18 Number of Persons on Live Register in County Wicklow in March 2015 by Age Group and Social Welfare Office

Data Source: CSO, 2015



Youth Unemployment Rate nationally decreased to 21.1% in March 2015, down from 21.6% in February 2015. Youth Unemployment Rate⁵ in Ireland averaged 18.4% from 1983 until 2015, reaching an all-time high of 31.1% in June 2012. Youth unemployment was at its lowest recorded level in October 2000 with a recorded rate of 6.2%. Table 2 8 presents the level (numbers) of youth unemployment (25 years and under) in County Wicklow by Social Welfare Office, from 2011 to April 2015.

Figure 2-19 Number of People Under 25 years of Age on the Live Register by Social Welfare Office

As identified from Table 2-9, Arklow Intreo Office possesses the highest proportion of youth on the Live Register at 15.2%, followed by Wicklow at 13.9%. Approximately 60% of all youth in the Live Register are male.

Table 2-9 Number of Persons on Live Register⁶ in April 2015 by Sex, Age Group, Social Welfare Office

Age	Area	Both sexes (Numbers)	% Both sexes	Male	% Male	Female	% Female
Under 25 years	Wicklow County	1,309	12.8%	791	60%	518	40%
	Arklow	391	15.2%	236	60%	155	40%
	Baltinglass	161	12.6%	92	57%	69	43%
	Bray	480	10.9%	288	60%	192	40%
	Wicklow	277	13.9%	175	63%	102	37%

5 Youth Unemployment Rate (persons aged 15-24) in Ireland is reported by Eurostat

6 This data is compiled by DSP from returns made for each local office

Age	Area	Both sexes (Numbers)	% Both sexes	Male	% Male	Female	% Female
25 years and over							
	Wicklow County	8,908	87.2%	5,394	61%	3,514	39%
	Arklow	2,173	84.8%	1,365	63%	808	37%
	Baltinglass	1,108	87.4%	656	59%	452	41%
	Bray	3,920	89.1%	2,295	59%	1,625	41%
	Wicklow	1,707	86.1%	1,078	63%	629	37%
All ages							
	Wicklow County	10,217	100%	6,185	61%	4,032	39%
	Arklow	2,564	100%	1,601	62%	963	38%
	Baltinglass	1,269	100%	748	59%	521	41%
	Bray	4,400	100%	2,583	59%	1,817	41%
	Wicklow	1,984	100%	1,253	63%	731	37%

2.14.2 Live Register Skills Profile

The CSO records the last occupation held by those on the Live Register. Table 2-10 ranks the top twenty occupations descriptions (as provided by the DSP) by number of persons signing on the Live Register in the County in March 2015, while a breakdown of numbers at each Wicklow Intreo office is also provided. The complete list of all persons signing on the Live Register is provided in Appendix 1.

Construction related skills (including craft and plant operative skills groups) rank highest in the Live Register figures as demonstrated by the many construction related occupations listed in Table 2-10, emphasising the continuing unemployment issues endured by these sectoral groups. While unemployment levels are decreasing nationally and the numbers on the Live Register in Wicklow is falling, recent job growth remains concentrated in certain sectors while other sectors including construction continue to lag. Long term unemployment within these sectors continues to be a key factor of concern. Retail and sales related occupations also rank highly in terms of persons currently on the Wicklow Live Register lists and the recent improvement in the retail sector reported over the past twelve months is welcomed, however retail closures experienced within the county since the economic recession remains evident as demonstrated by the vacancy levels in the main county settlements (see Retail Section 5).

Table 2-10 Live Register (Persons) by Last Occupation Held and Social Welfare Office

Last Occupation Held	County	Bray	Wicklow	Arklow	Baltinglass
Construction, woodwork and metal and related	2,680	970	830	620	270
Craft and related	1,850	1,050	170	490	140
Other broad occupational groups	1,640	330	670	370	280
Plant and machine operatives	1,480	490	210	460	320
Retail, sales	1,340	490	250	510	90
Personal and protective services	1,310	460	300	340	210
General operatives	1,250	440	150	390	280
Sales	1,240	460	230	470	80
Clerical and secretarial	1,220	700	210	180	130

Last Occupation Held	County	Bray	Wicklow	Arklow	Baltinglass
Office admin, clerical, secretarial	1,210	690	210	180	130
Blocklayer, bricklayer, builder, building contractor, other construction trade	1,020	650	70	240	50
Builder's mate, carpenter's mate, construction other occupation, road construction or maintenance	960	60	610	180	120
Check-out operator, petrol-pump attendant, sales assistant, salesman/woman/persons, shop assistant	850	230	200	340	70
Domestic and catering	840	330	150	230	130
Packer, sorter, tester, wrapper	830	270	10	300	240
Administrative officer, civil servant, clerical assistant, clerical officer	710	510	30	110	60
Professional	590	370	80	110	40
Management	580	350	90	110	30
Managers and administrators	530	290	80	120	40
Health and related industries	530	190	140	130	70

Source: CSO StatBank/Live Register/LRM31 (2015M03)

3 Employment Profile of County Wicklow

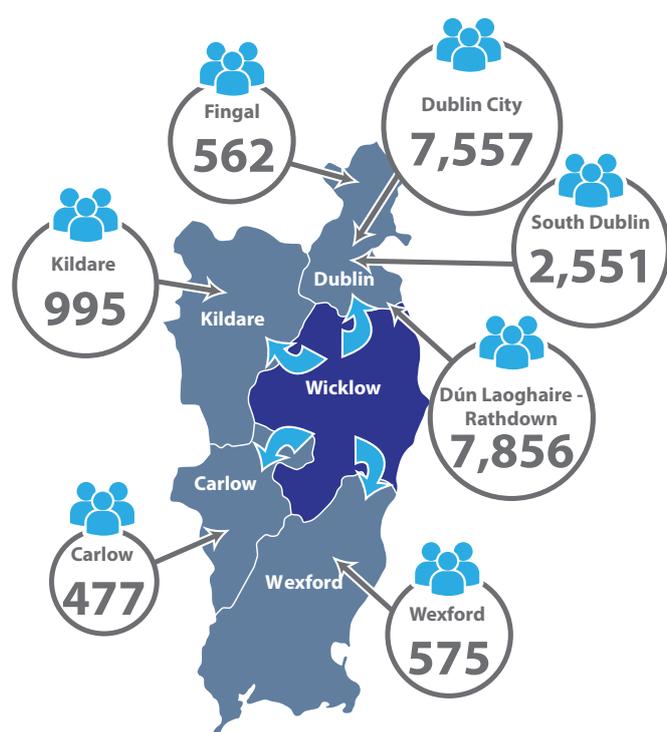
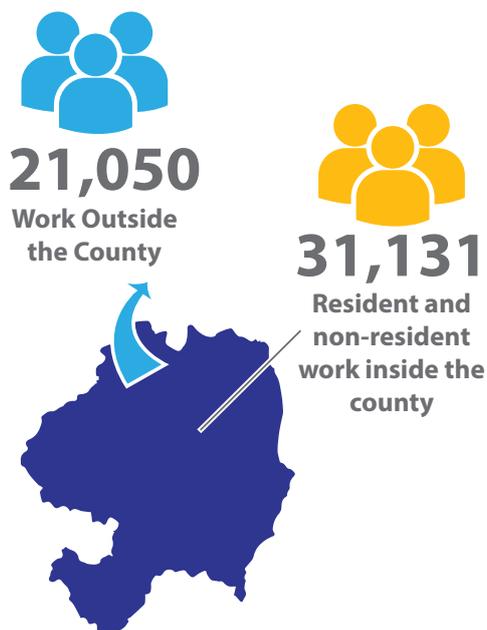
This section examines the economic structure of the County to identify the relationship of the County and its towns with surrounding areas. In order to provide an overview of the county's sub-regional performance, employment patterns and spatial linkages, the CSO's Place of Work, School or College Census of Anonymised Records (POWSCAR) dataset was used to analyse the location of jobs and travel-to-work patterns for County Wicklow. The use of CSO POWSCAR datasets, derived from the 2011 Census has enabled the evaluation of key development trends relating to socio-economic trends and commuting patterns within the County.

3.1 County Commuting Patterns

Analysis of the 2011 Census shows there were 136,340 people resident in County Wicklow, with a labour force of 65,581 people. The data identifies that there are 27,574 persons active in the Wicklow labour force, denoting a 42% jobs ratio for the County. Of this, 19,283 (70%) are from Wicklow.

The data derived from POWSCAR informs us that there is a marginally larger number of people from County Wicklow commuting out of the County (21,050 persons) for employment than are both resident and working (19,283 persons) within the County.

As part of this report, the functional relationship between County Wicklow and its neighbouring counties (including Dún Laoghaire Rathdown, (DLR), South Dublin, Fingal, Kildare, Carlow, Wexford) and large urban centres (Dublin City) is assessed. This analysis identifies the relationship between County Wicklow's resident and working population and key neighbouring settlements outside of the County. In particular, the analysis examines the influence of Dublin City on the economic life of the Wicklow County.



Assessment of county-wide commuting patterns identifies a high level of commuting out of County Wicklow by its residents for employment. Figure 3-1 illustrates the number of Wicklow residents commuting out of the county to neighbouring counties for employment.

Figure 3-1 Numbers of Wicklow Residents Commuting out of County Wicklow to Neighbouring Counties for Employment

Analysis of the main settlements has determined the high levels of out-commuting from the five main County towns as presented in Table 3-1.

Table 3-1 Proportion of Working Persons Commuting out of Resident Settlement Towns

Settlement	Work within Resident Settlement	Out-commuting
Bray	30%	70%
Wicklow-Rathnew	35%	65%
Arklow	42%	58%
Greystones-Delgany	12%	88%
Blessington	16%	84%

Table 3-1 illustrates the high proportion from each settlement that commute out for employment. As shown, the main settlements in the north of the county possess the highest rates of commuting, with 88% of Greystones-Delgany working residents travelling out of the area for work, while the figure for Blessington is 84%. While the settlements of Bray and Wicklow-Rathnew have a lower rate out-commuting, the numbers out remain high.

Table 3-2 shows that 37% of people from Wicklow working outside of County Wicklow are working in Dún Laoghaire-Rathdown area (7,856 persons), followed by 36% (7,557 persons) working in the Dublin City Council area.

Table 3-2 Residents of County Wicklow Commuting Out of the County

Place of Work	Grand Total	% Total
Dún Laoghaire-Rathdown	7,856	37%
Dublin City	7,557	36%
South Dublin Region	2,551	12%
Kildare	995	5%
Wexford	575	3%
Fingal	562	3%
Carlow	477	2%
All Above	20,573	98%
All Other Areas	477	2%
All Counties (excluding Wicklow)	21,050	100%

3.2 Analysis of Employment by Education Level

The following table presents the percentage of people working in the five main county settlements, according to education attainment levels. The data, derived from the Census 2011, shows that a higher proportion of people working in each settlement town have completed up to secondary level in their education, as compared to those who have attained qualifications of third level or higher.

The extent of higher education attainment of those working in the towns differs across those towns. For example, 57% of persons working in Bray have a secondary or lower education attainment level, while 38% have a third level or higher attainment level. In Wicklow-Rathnew, 58% of persons working have a secondary or lower education attainment level, while 37% have a third level or higher attainment level.

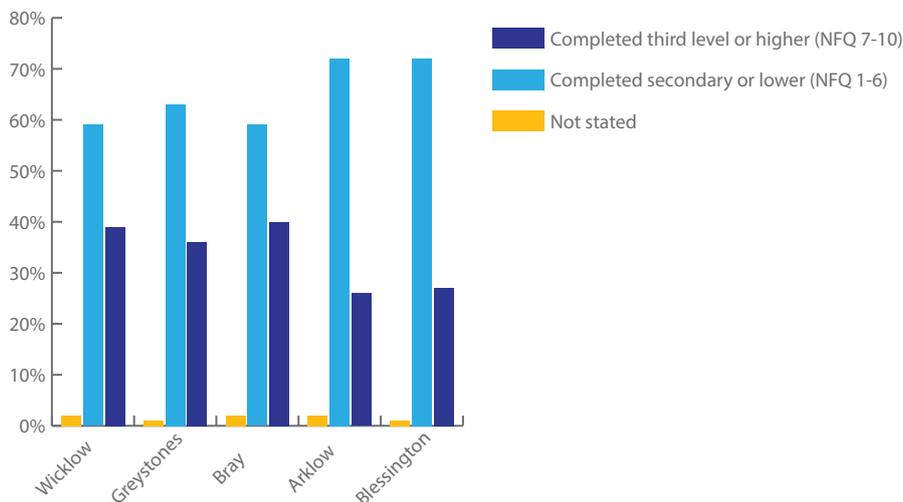


Figure 3-2 Percentage of persons working in County Settlement Towns by Education Level

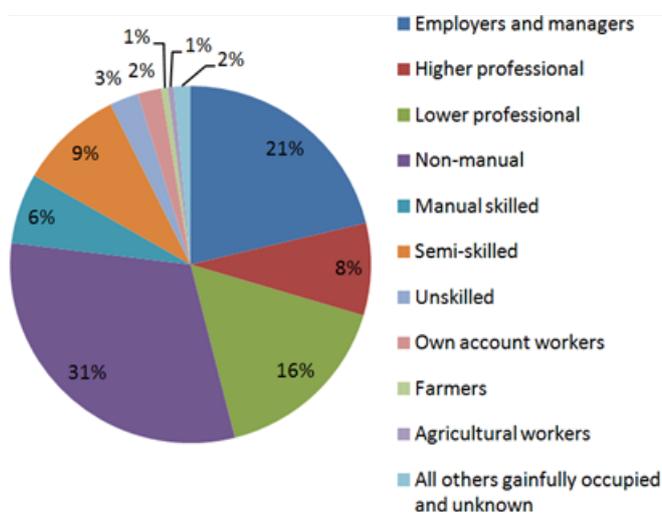
3.3 Employment Profile by Socio-Economic Group

The following section presents the employment makeup of the County by socio-economic group (SEG). The CSO Census of Population 2011 classified the entire population by socio-economic groups (of which there are ten SEGs). The socio-economic group of persons aged 15 years or over who are at work is identified by their occupation and employment status. It should be noted that unemployed or retired persons aged 15 years or over are classified according to their former occupation and employment status. Persons looking after the home/family or at school/college, who are members of a family unit, are classified to the socio-economic group of another person in the family unit using a priority table based on the relationships within the family. Unrelated persons or persons living alone who are looking after the home/family or at school/college were assigned to the unknown group.

3.3.1 Employment in Wicklow

The following chart (Figure 3 3) shows the percentage of those working in County Wicklow by SEG (CSO, 2011). The data identified that the highest numbers of employees are working in non-manual sectors (31%), followed by 21% working as employers and managers; while 16% of workers describe themselves as farmers and 8% of workers are higher professionals.

Figure 3-3 Percentage of Workers by Socio-Economic Group



The primary focus of this analysis was to identify the employment destinations of commuters from the study area to the wider region, and of commuters to Wicklow and the sectors in which they are employed. Using POWSCAR derived data, the analysis examined the travel and commuting patterns of those residents who both live and work within the study area, particularly within the larger urban settlements. Taken together, this data presents an in-depth analysis of spatial and functional linkages within and between Wicklow and the wider region. Analysis of the main settlements has determined the high levels of out-commuting from the five main County settlement towns.

Figure 3-4 shows the proportion of people working in each of the five main County settlements by SEG. The graph highlights that the pattern of people working in each SEG is very similar across all settlements.

As evident from the graph below, the highest proportion of people working in each settlement are employed in 'Non-manual' SEG, with the proportion highest in Wicklow-Rathnew and lowest in Bray. With regard the SEG comprising 'Employers and Managers', Bray possesses the highest proportion of people working in this SEG. Wicklow and Bray possess the highest proportion of 'Higher Professional' workers by SEG, while Blessington and Arklow possess the lowest proportion within this SEG. Blessington possesses the highest proportion of persons falling within the 'Manual skilled', 'Semi-skilled' and 'Unskilled' SEGs.

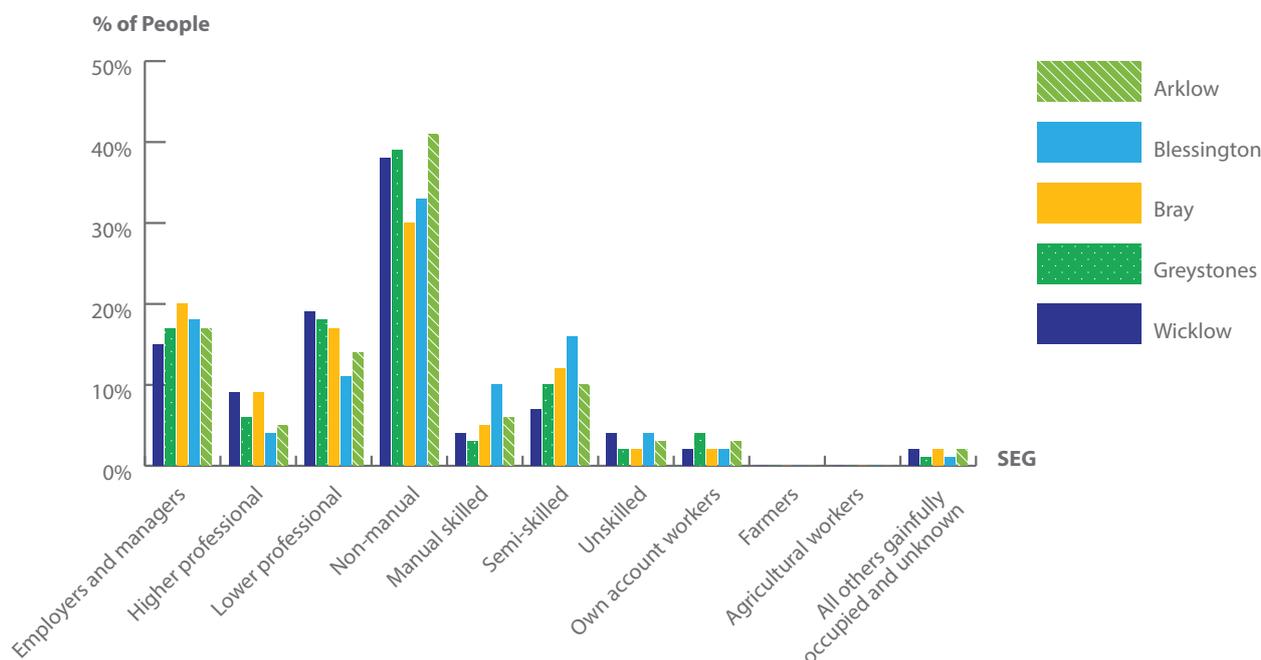


Figure 3-4 Percentage of All Persons Working in the Main County Settlements by SEG

3.3.2 Out-commuting from Wicklow

The following table and graph shows the number of people from County Wicklow employed outside of the County by SEG. The areas referenced are the areas outside of County Wicklow in which the highest numbers of County Wicklow residents are employed. As shown, the Dublin region employs a significant proportion of County Wicklow residents, with a very high majority of people commuting to Dún Laoghaire Rathdown functional area and Dublin City Centre.

Table 3-3 Number of County Wicklow residents employed outside of County Wicklow by SEG

Area	Grand Total	Employers and Managers	Higher Professional	Lower Professional	Non-Manual	Manual Skilled	Semi-Skilled
Dún Laoghaire-Rathdown	7,522	1,835	753	1,512	2,514	351	557
Dublin City	7,330	2,141	1,131	1,548	1,919	359	232
South Dublin Region	2,438	726	214	441	569	311	177
Kildare	939	183	89	175	300	80	112
Fingal	527	172	58	88	102	63	44
Wexford	521	110	42	111	146	59	53
Carlow	425	72	37	62	154	54	46

Figure 3-5 presents the data contained in Table 3-3 in percentage terms according to SEG and location of employment.

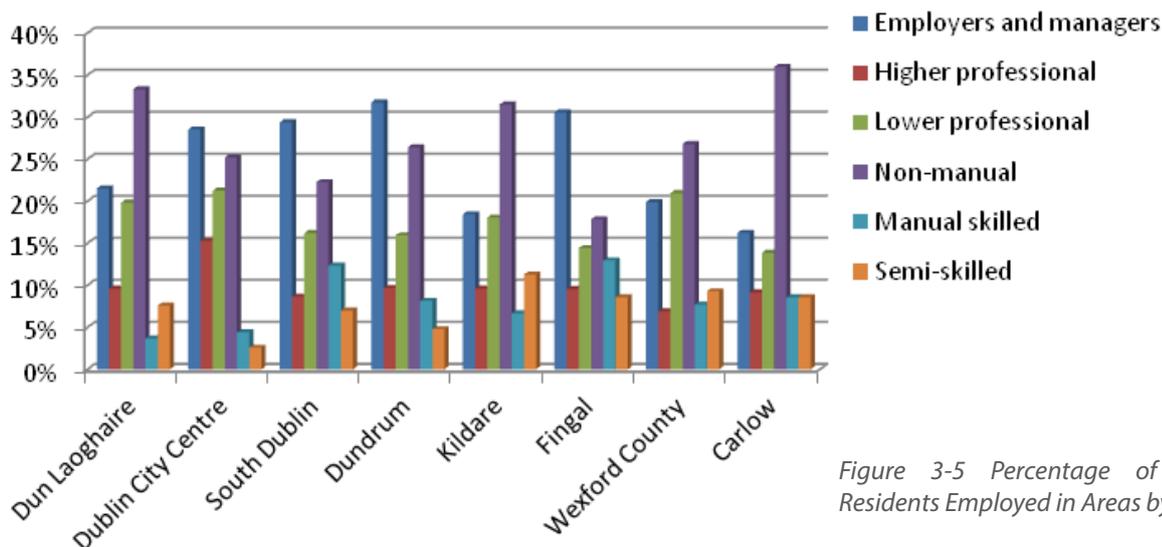


Figure 3-5 Percentage of Wicklow Residents Employed in Areas by SEG

As shown, a high proportion of people working in the Dublin region (in excess of 20% per Dublin area) are working within the SEG of 'Employers and Managers'. This proportion decreases in those working outside of the Dublin region, where 'Non-manual' is the most common SEG, notably counties Carlow and Kildare, where over 30% of all workers per county fall within this SEG. The proportion of workers within the 'Non-manual' SEG is also high for those working in the Dublin region and this SEG represents the highest SEG in Dún Laoghaire.

The proportion of workers within the 'Higher Professional' SEG is highest in Dublin City Centre where 15% of workers fall within this SEG category.

As identified, there are a significant number of Wicklow residents commuting into Dublin City Centre for employment, particularly from the north Wicklow settlements. Figure 3-6 presents the proportion of people commuting to the Dublin City centre areas of Dublin 1, Dublin 2, and Dublin 4, by SEG, while Table 3-4 presents the actual numbers of people commuting to these areas.

Figure 3-6 Numbers of Wicklow Residents Employed in Dublin City Centre by SEG

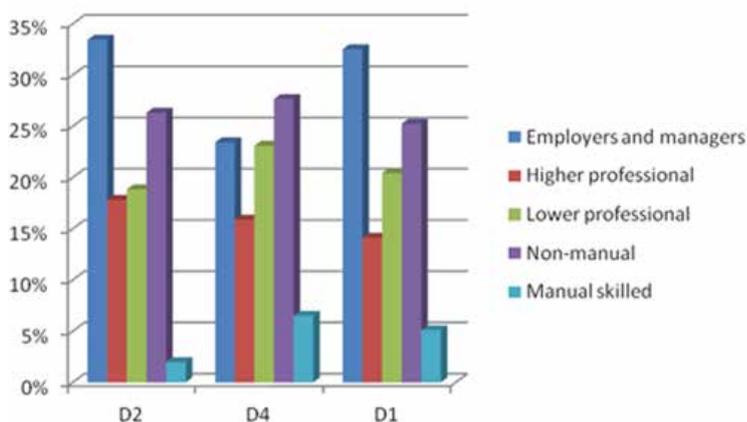


Table 3-4 Number of Wicklow Residents Employed in Dublin City Centre by SEG

Dublin Postal Code Area	Employers and managers	Higher professional	Lower professional	Non-manual	Manual skilled	Semi-skilled	Grand Total
Dublin 2	845	450	476	665	50	41	2,527
Dublin 4	432	293	426	510	120	63	1,844
Dublin 1	389	169	244	302	61	31	1,196

Of the three Dublin postal code areas, the highest number of people from County Wicklow are working in the Dublin 2 area, with 2,527 employed. The highest proportion of Wicklow residents working in the Dublin postal code areas of Dublin 1, Dublin 2 and Dublin 4 fall within the SEG of 'Employers and Managers'. While the proportion is similar for both D1 and D2, Table 12 shows that over twice the number of people are working in D2 within this SEG (845 persons in D2 compared to 389 persons in D1), with 33% of all Dublin 2 based Wicklow workers within this SEG.

A similar proportion of Wicklow residents (between 14% and 18%) are working in the 'Higher Professional' SEG in Dublin 1, Dublin 2 and Dublin 4. 26% of Wicklow residents working in D2 fall within the 'Non-manual' SEG, while 27% of Wicklow residents fall under this SEG in D4, representing the highest SEG figure in D4.

3.4 Employment Profile by Industrial Group

The table below presents the number of Wicklow people employed in the County by industrial group.

Table 3-5 Number of Persons Travelling to Work in County Wicklow by Industrial Group 2011

Industrial Grouping of Total Persons Working in Wicklow County	Total
Agriculture, forestry and fishing	1,714
Construction	911
Manufacturing, mining and quarrying, Electricity, Gas	4,334
Wholesale, Retail Trade, Transportation and Storage	8,928
Information and Communication, Financial, Real Estate	1,489
Public Administration and Defence; Compulsory Social Security	1,505
Education, Human Health and Social Work Activities	7,375
Other Service Activities	4,875
Grand Total⁷	31,131

As shown in Table 3-5, the largest number of people (29% of all workers) were employed in the 'Wholesale, Retail Trade, Transportation and Storage' sector, followed by 24% of people working in 'Education, Human Health and Social Work Activities'. The 'Manufacturing, mining and quarrying, Electricity, Gas' sector employs 14%. Unsurprisingly, following the economic recession, only 3% (911 persons) were employed in the 'Construction' sector. It should be noted that persons from the construction sector rank highest on Wicklow's Live Register as shown previously in Table 2-10.

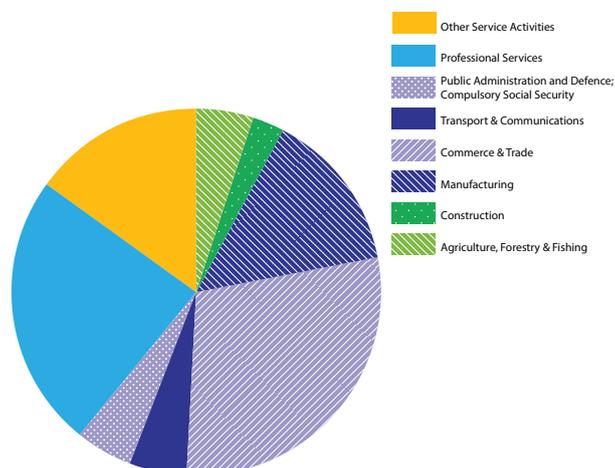


Figure 3-7 Industrial groups of Total Persons Working in County Wicklow by Percentage

Based on data derived from the CSO POWSCAR 2011 database, we have identified the number of people resident in County Wicklow and working within the County, and also those commuting out of the County for employment, by industrial grouping.

The following table examines the number of Wicklow resident workers in each industrial group irrespective of where they work.

Table 3-6 Total Number of County Wicklow Residents by POWSCAR Industrial Group⁸

Industrial Group	Total (Numbers)	Total (%)
Agriculture, forestry and fishing	576	1%
Manufacturing, mining and quarrying, Electricity, Gas	4,926	12%
Construction	1,035	3%
Wholesale, Retail Trade, Transportation and Storage	10,872	27%
Information and Communication, Financial, Real Estate	8,967	22%
Public Administration and Defence; Compulsory Social Security	2,550	6%
Education, Human Health and Social Work Activities	8,977	22%
Other Service Activities	2,141	5%
Grand Total	40,333	100%

POWSCAR data identifies that 27% (10,872 persons) of Wicklow residents employed are working in 'Wholesale, Retail Trade, Transportation and Storage' sectors, as presented in Figure 3-8. POWSCAR data also identified that 22% of employed Wicklow residents are working in 'Information and Communication, Financial, Real Estate' and 'Education, Human Health and Social Work Activities' respectively.

In total, there are 21,050 residents from County Wicklow commuting out of the county for employment. Table 3 7 presents the industrial groups in which these employees are working in. Figure 3-9 shows that 32% (6,781 persons) of all those commuting out of the county are working in the Information and Communication, Financial, Real Estate sectors. 21% respectively are working in Education, Human Health and Social Work Activities and Wholesale, Retail Trade, Transportation and Storage sectors.

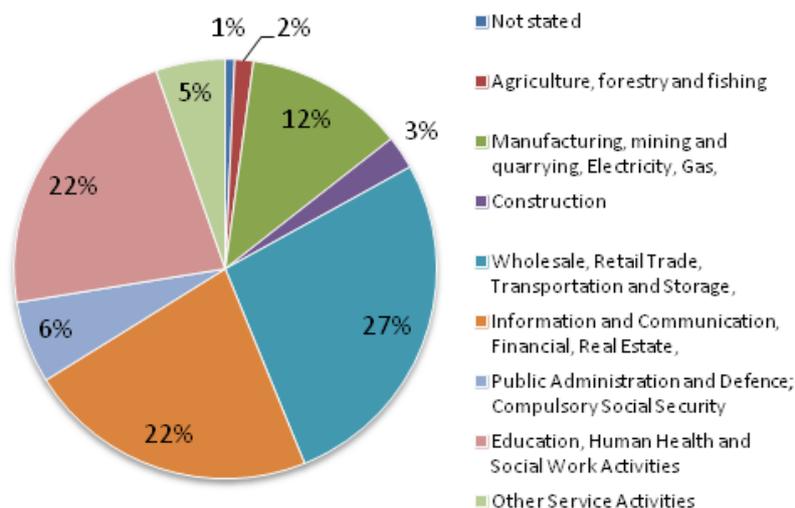


Figure 3-8 Proportion of Wicklow Residents Working Categorized by POWSCAR Industrial Group

⁸ This table is based on POWSCAR data and therefore does not account for persons who failed to account for industrial group, or for whom no fixed place of work was indicated or for whom their place of work and residence are the same address

Table 3-7 Wicklow Residents Employed Outside of County Wicklow by Industrial Group

Industrial Grouping of Total Persons Working Outside of County Wicklow	Numbers Working in all counties (Excl. Wicklow)
Not stated	125
Agriculture, forestry and fishing	107
Manufacturing, mining and quarrying, Electricity, Gas,	2,279
Construction	537
Wholesale, Retail Trade, Transportation and Storage,	4,374
Information and Communication, Financial, Real Estate,	6,781
Public Administration and Defence; Compulsory Social Security	1,562
Education, Human Health and Social Work Activities	4,435
Other Service Activities	850
Grand Total	21,050

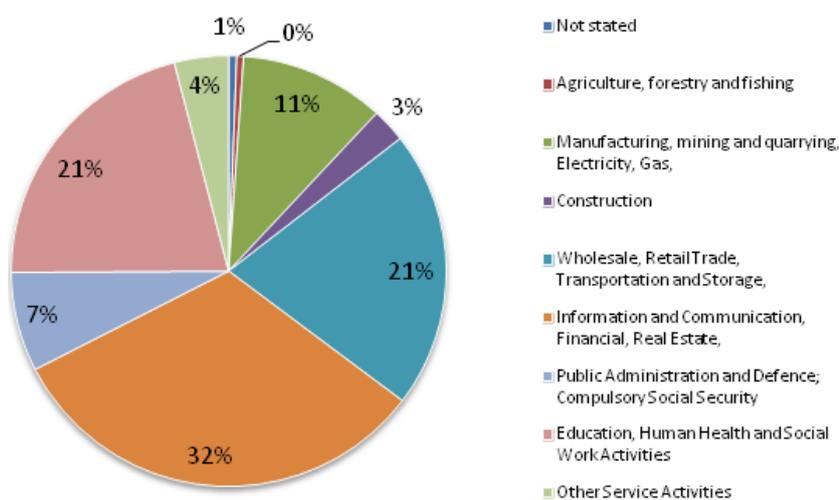


Figure 3-9 Proportion of Wicklow Residents Working Outside of County Wicklow

While the proportion of people leaving the County to work in ‘Wholesale, Retail Trade, Transportation and Storage’ and ‘Education, Human Health and Social Work Activities’ are generally similar levels to those working within Wicklow in these sectors, there is a significant increase (+10%) in the proportion of Wicklow residents leaving the County to work in ‘Information and Communication, Financial, Real Estate’ sectors, compared to those that are working in these sectors within County Wicklow.

and Communication, Financial, Real Estate’ sectors, compared to those that are working in these sectors within County Wicklow.

Table 3-8 shows that there are 7,856 persons from Wicklow working in Dún Laoghaire-Rathdown area, while a further 7,557 persons are working in Dublin City Centre. Within both of these Dublin areas, the highest number of Wicklow residents working in these locations are employed within the ‘Information and Communication, Financial, Real Estate’ sectors as demonstrated in Figure 3-10.

Wholesale, Retail Trade, Transportation and Storage sectors represent the highest proportion of Wicklow residents employed in South Dublin, Kildare, Wexford, Fingal and Carlow as demonstrated in Figure 3-10.

Table 3-8 Top Counties in which Wicklow Residents are Working Outside of the County

Industrial Grouping of Total Persons Working in Wicklow County	Not stated	Agriculture, forestry and fishing	Manufacturing, mining and quarrying, Electricity, Gas,	Construction	Wholesale, Retail Trade, Transportation and Storage,	Information and Communication, Financial, Real Estate,	Public Administration and Defence; Compulsory Social Security	Education, Human Health and Social Work Activities	Other Service Activities	Grand Total	% Total
Dún Laoghaire-Rathdown	65	11	967	133	1,627	2,382	349	1,970	352	7,856	37%
Dublin City	33	8	357	103	1,083	3,423	852	1,399	299	7,557	36%
South Dublin	9	6	437	147	794	481	120	477	80	2,551	12%
Kildare	3	26	187	54	237	134	87	223	44	995	5%
Wexford	4	19	79	20	196	61	47	134	15	575	3%
Fingal	2	2	94	21	186	160	39	46	12	562	3%
Carlow	4	26	66	21	141	49	34	112	24	477	2%
All Above	120	98	2,187	499	4,264	6,690	1,528	4,361	826	20,573	98%
Other Areas	5	9	92	38	110	91	34	74	24	477	2%
All Counties (excluding Wicklow)	125	107	2,279	537	4,374	6,781	1,562	4,435	850	21,050	100%

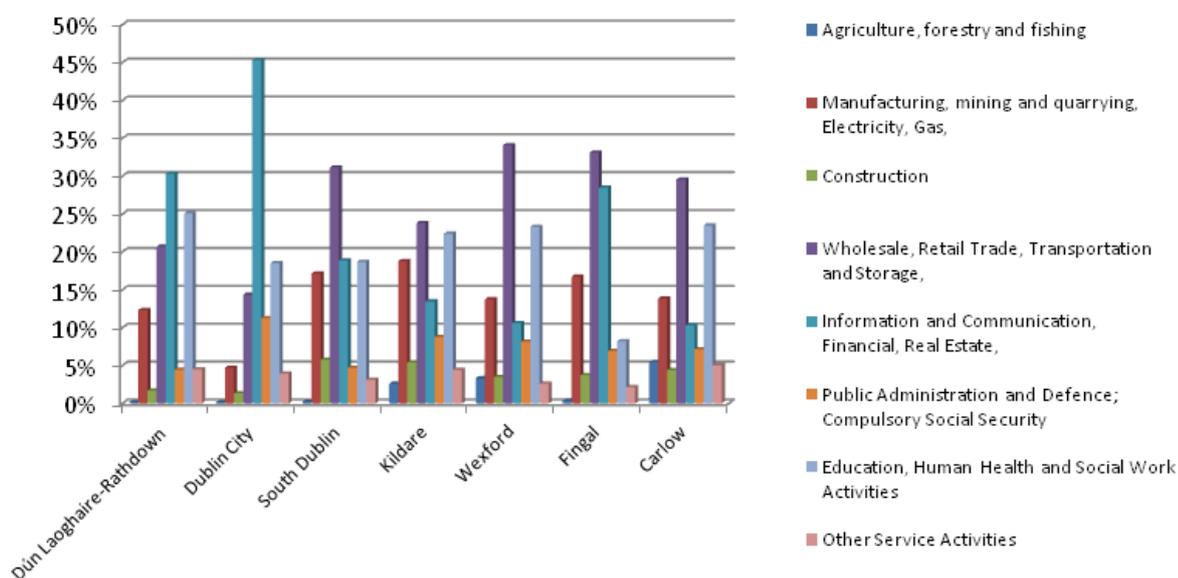


Figure 3-10 Percentage of persons working outside of Wicklow by Industrial Group

3.5 Persons Commuting into County Wicklow from Other Counties

This section assesses the breakdown of people working in County Wicklow who are in-commuting into the County. Table 3-9 shows that the highest proportion of in-commuters are travelling into County Wicklow from neighbouring Dún Laoghaire-Rathdown (29%) and County Wexford (26%).

Of the in-commuters from Dún Laoghaire-Rathdown employed in the County, 702 persons work in the 'Wholesale, Retail Trade, Transportation and Storage' sectors, followed by 589 persons working in 'Education, Human Health and Social Work Activities'.

Of the in-commuters travelling into the County from County Wexford, 580 persons are working in 'Wholesale, Retail Trade, Transportation and Storage' sectors, while a further 506 persons work in 'Education, Human Health and Social Work Activities'.

Table 3-9 Persons Commuting into County Wicklow for Employment by Industrial Group

Place of Origin	Agriculture, Forestry, Fishing	Manufacturing, mining and quarrying, Electricity, Gas,	Construction	Wholesale, Retail Trade, Transportation and Storage,	Information and Communication, Financial, Real Estate,	Public Administration and Defence; Compulsory Social Security	Education, Human Health and Social Work Activities	Other Service Activities	Grand Total	%
Dún Laoghaire-Rathdown	35	380	54	702	415	104	589	130	2,427	29%
Wexford	69	363	56	580	300	172	506	73	2,133	26%
Kildare	25	204	51	210	73	34	171	39	810	10%
Carlow	13	90	24	397	44	33	123	28	754	9%
South Dublin	15	161	37	205	107	43	121	29	725	9%
Dublin City	16	117	19	172	128	28	145	21	649	8%
Fingal	3	51	12	50	41	11	30	7	207	2%
Laois	4	28	2	42	7	15	23	4	125	2%
Above	180	1,394	255	2,358	1,115	440	1,708	331	7,830	94%
All Other Areas	36	80	24	100	59	29	115	16	461	6%
Grand Total	216	1,474	279	2,458	1,174	469	1,823	347	8,291	100%

3.6 County Wicklow Employment Summary

The information in the previous charts and figures indicates the following

- There are more Wicklow residents commuting out of the County for employment than staying in the County to work
- There is a very strong employment interdependence between the main settlements in the north

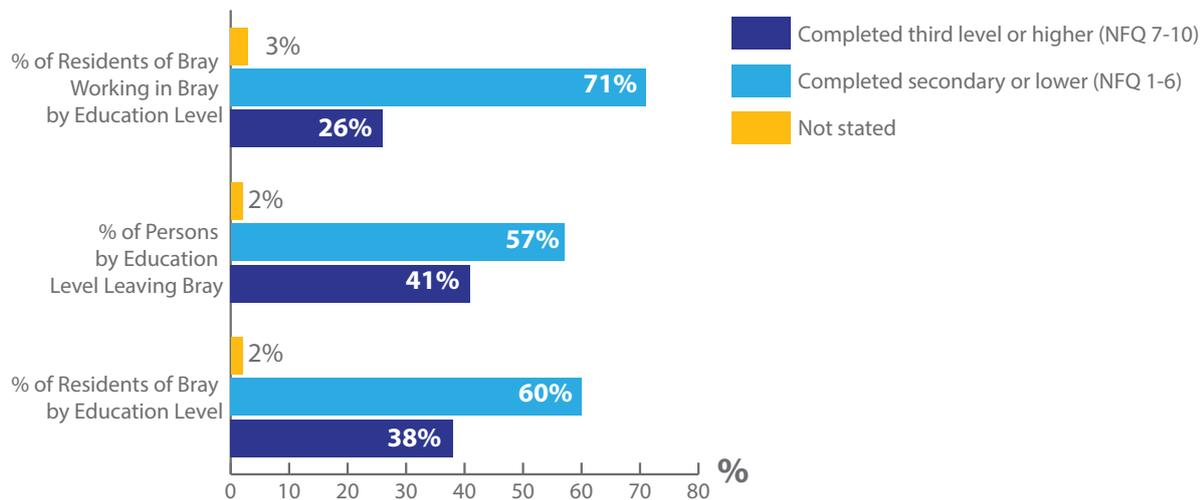


Figure 3-12 Education Levels of Bray Residents Working Within and Outside of Bray

3.7.1.4 Employment Profile

As part of the study, an in depth analysis of employment sectors and commuting patterns of residents from Bray was undertaken. The primary purpose of this analysis is to observe the employment relationship between the resident population of Bray, the employment sector within the town and its wider regional catchment in terms of employment and employees.

Table 3-10 presents the numbers of people working in various industrial sectors as categorised by the Central Statistics Office, Census 2011.

Table 3-10 Employment of Bray Residents by Industrial Group

Industrial Group	Total	% of Total
Manufacturing, mining and quarrying, Electricity, Gas,	1,270	12%
Construction	169	2%
Wholesale, Retail Trade, Transportation and Storage,	2,815	26%
Information and Communication, Financial, Real Estate,	2,641	24%
Public Administration and Defence; Compulsory Social Security	632	6%
Education, Human Health and Social Work Activities	2,544	24%
Other Service Activities	634	6%
Not Stated / Other	104	1%
Grand Total	10,809	100%

Table 3-10 shows that three quarters of all Bray residents employed are working in one of three industrial groups: Wholesale, Retail Trade, Transportation and Storage (26%), Information and Communication, Financial, Real Estate (24%) and Education, Human Health and Social Work Activities (24%).

Table 3-11 Place of Work for Residents of Bray by Industrial Group

Place of Work	Total	Manufacturing, mining and quarrying, Electricity, Gas,	Construction	Wholesale, Retail Trade, Transportation and Storage,	Information and Communication, Financial, Real Estate,	Public Administration and Defence; Compulsory Social Security	Education, Human Health and Social Work Activities	Other Service Activities
Bray	3290	505	23	1,106	357	116	907	246
Dublin Southeast⁹	1795	210	30	418	318	125	552	131
Dublin 2	1043	50	7	95	533	151	139	59
Dublin 4	710	23	9	92	294	31	234	23
Dublin 18¹⁰	557	25	4	160	188	4	133	30
Dublin 1	459	8	4	104	243	42	40	15
Dundrum-Balally	362	62	5	75	174	4	36	2
Greystones	334	18	10	119	41	3	102	36
Cabinteely-Loughlinstown	248	96	5	51	89	0	3	3
Dublin 6	92	1	2	7	19	16	37	10
Wicklow-Rathnew	90	11	1	10	4	24	33	7
Dublin 14¹¹	88	4	5	20	24	9	23	3
Newcastle	86	12	5	21	7	1	27	5
Dundrum-Sandyford	75	3	0	34	24	0	9	5
Arklow	30	5	1	9	5	2	5	2
Dublin 16¹²	26	3	0	8	1	2	8	4
Other Areas	1524	234	58	486	320	102	256	53
Total	10,809	1270	169	2,815	2,641	632	2,544	634

Table 3-11 examines the industrial group and place of work of Bray residents. The table illustrates that of all the industrial groups employing residents of Bray within the town, a very high proportion are working in Wholesale, Retail Trade, Transportation and Storage; Education, Human Health and Social Work Activities and Manufacturing, mining and quarrying, Electricity, Gas sectors. The largest group of workers from the

9 This area comprises the functional area of Dún Laoghaire Rathdown County Council but excludes areas specifically referred to in the table

10 Dublin 18 includes Cabinteely, Carrickmines, Central Park Leopardstown and adjacent areas.

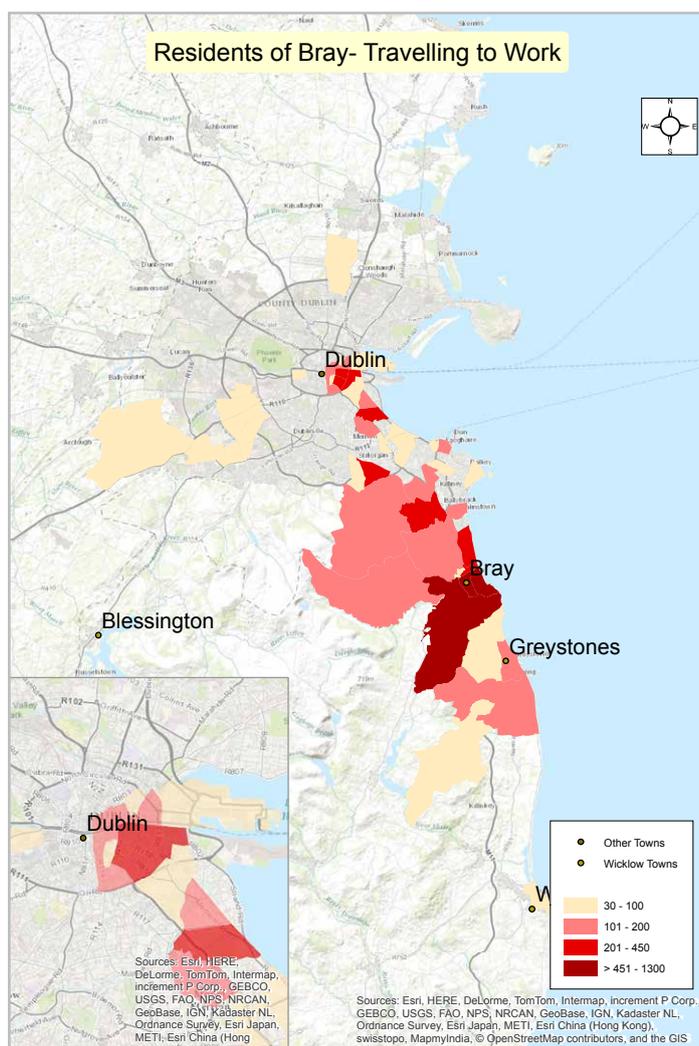
11 Dublin 14 includes Dundrum, Churchtown, Windy Arbour, Rathfarnham and adjacent areas. Where an area in this postal code has been specifically identified in the table, this named area has been excluded from the postal code figures

12 Dublin 16 includes Sandyford, and adjacent areas. Where an area in this postal code has been specifically identified in the table, this named area has been excluded from the postal code figures

town work in the Wholesale, Retail Trade, Transportation and Storage sectors (1,106 persons). However as evident from Table 3-11, there is a very high proportion of the resident Bray population commuting out of the town for employment, of which a high proportion are travelling to Dublin City Centre and general south area of County Dublin. For example, 1,795 people commute to the southeast region of Dublin, a high proportion of whom are employed in Education, Human Health and Social Work Activities (552 persons) and Wholesale, Retail Trade, Transportation and Storage sectors (418 persons).

533 persons commute to Dublin 2 to work in the Information and Communication, Financial, Real Estate sectors, while a further 294 are commuting to Dublin 3 area to work in this same sector. In total, 2,284 persons commute out of Bray to work in the Information and Communication, Financial, Real Estate sectors.

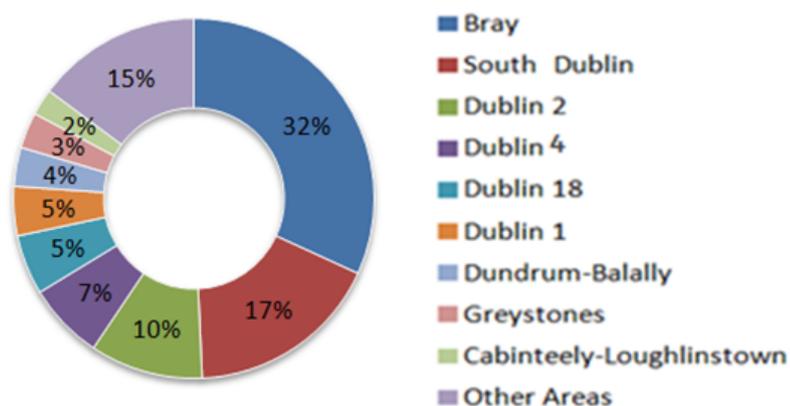
Based on data derived from the CSO POWSCAR database, the following map presents spatially the commuting trends of residents out of Bray for employment. This map illustrates the relationship between Bray, its communities and employment commuting patterns as they relate to other settlements. The largest proportion of people working in Bray are from Bray. Whilst there is commuting to other settlements such as Greystones-Delgany, Arklow and to a lesser extent Wicklow-Rathnew, there is a very evident pattern of out-commuting into the Dublin region, notably the southeast Dublin areas of Dún Laoghaire Rathdown, Dublin City Centre areas (D1, D2, D4) and Dublin 18.



As identified from Table 3-10, the highest number of people in Bray are employed in the Wholesale, Retail Trade, Transportation and Storage (2815), followed closely by Information and Communication, Financial, Real Estate (2,641) and Education, Human Health and Social Work Activities (2,544). 2,212 people are working in Dublin City Centre areas of Dublin 1, Dublin 2 and Dublin 3. Of the numbers commuting to Dublin 1 and Dublin 2, over half are employed in the Information and Communication, Financial, Real Estate sector and commuting (53% in D1 and 51% in D2). Figure 3-14 shows that 32% of Bray residents are going to work in Bray, with 17% commuting to areas in south Dublin. 23% of Bray residents commute to Dublin City centre areas of Dublin 1, Dublin 2 and Dublin 4 (combined total figure) for employment.

Figure 3-13 Commuting Patterns of Residents of Bray

Figure 3-14 Proportion of Bray Residents going to Work by Employment Location



3.7.1.5 People In-Commuting To Bray For Employment

As part of this analysis, the in-commuting patterns to Bray for employment were examined. Table 3-12 illustrates the total number of people working in Bray (including Bray residents). Table 3-12 shows that many commute into the town. As shown, 64% (5,776) of workers are from various parts of County Wicklow, signifying that Bray is an important focus for employment for County Wicklow residents. 19% (1,756 persons) in-commute from the Dún Laoghaire Rathdown area, the majority of whom are employed in Wholesale, Retail Trade, Transportation and Storage; Education, Human Health and Social Work Activities and Manufacturing, mining and quarrying, Electricity, Gas sectors.

Table 3 12 In-commuting to Bray at County Level

Place of Origin	Total	Agriculture, forestry and fishing	Manufacturing, mining and quarrying, Electricity, Gas,	Construction	Wholesale, Retail Trade, Transportation and Storage,	Information and Communication, Financial, Real Estate,	Public Administration and Defence; Compulsory Social Security	Education, Human Health and Social Work Activities	Other Service Activities
Wicklow County	5,776	7	1,112	59	1,650	765	232	1,524	384
Dún Laoghaire-Rathdown	1,756	2	344	24	481	268	71	456	98
Dublin City	410	1	112	6	88	82	16	94	11
South Dublin	390	2	133	6	95	58	28	54	13
Wexford	299	1	78		63	51	29	70	4
Fingal	130		39	1	25	35	8	17	4
Kildare	104		36	2	12	19	9	19	6
All other Counties	208	0	62	4	47	33	8	47	7
Grand Total	9,073	13	1,916	102	2,461	1,311	401	2,281	527

Table 3-13
Group

Persons Working in Bray by Industrial

Industrial Group	Total	% of Total
Manufacturing, mining and quarrying, Electricity, Gas,	1,916	21%
Construction	102	1%
Wholesale, Retail Trade, Transportation and Storage,	2,461	27%
Information and Communication, Financial, Real Estate,	1,311	14%
Public Administration and Defence; Compulsory Social Security	401	4%
Education, Human Health and Social Work Activities	2,281	25%
Other Service Activities	527	6%
Not Stated / Other	74	1%
Grand Total	9,073	100%

Table 3-13 presents the proportion of people employed in Bray by industrial grouping. As demonstrated, in excess of 50% of people working in Bray are employed in Wholesale, Retail Trade, Transportation and Storage (27%) and Education, Human Health and Social Work Activities (25%). 14% of all persons working in Bray (1,311 persons) are employed in Information and Communication, Financial, Real Estate sectors

Table 3-14 below breaks down the origin of the commuters from the Wicklow and Dublin regions and assesses them according to industrial group. Almost 12% commute into Bray from the southeast of Dublin, while a further 11% travel from nearby Greystones-Delgany. Nearly half of all those commuting in to Bray from Greystones-Delgany are working in either 'Education, Human Health and Social Work Activities' or 'Wholesale, Retail Trade, Transportation and Storage sectors'.

Table 3-14 In-commuting to Bray at Local Level

Place of Origin	Total	Manufacturing, mining and quarrying, Electricity, Gas,	Wholesale, Retail Trade, Transportation and Storage,	Information and Communication, Financial, Real Estate,	Public Administration and Defence; Compulsory Social Security	Education, Human Health and Social Work Activities	Other Service Activities
Bray	3,324	586	1,063	346	112	900	257
Dublin Southeast	1,082	199	302	151	45	301	62
Greystones - Delgany	1,002	198	244	180	44	253	68
Dublin 18	510	102	146	87	17	120	28
Wicklow	346	83	81	40	34	82	15
Arklow	258	89	49	46	10	57	4

Place of Origin	Total	Manufacturing, mining and quarrying, Electricity, Gas,	Wholesale, Retail Trade, Transportation and Storage,	Information and Communication, Financial, Real Estate,	Public Administration and Defence; Compulsory Social Security	Education, Human Health and Social Work Activities	Other Service Activities
Newcastle ¹³	237	48	69	45	6	50	17
Dublin 16	161	46	29	28	14	34	5
Dublin 24	128	48	42	19	4	10	1
Dublin 14	100	28	20	15	4	26	3
Dublin 4	73	15	22	14	2	17	3
Dublin 6	55	12	8	13	2	18	2
Total	7,276	1,454	2,075	984	294	1,868	465
All Other Areas	1,797	462	386	327	107	413	62
Grand Total	9,073	1,916	2,461	1,311	401	2,281	527

The table above shows that 37% of all those working in Bray are from Bray while a further 21% of people working in Bray are in-commuting from south county Dublin.

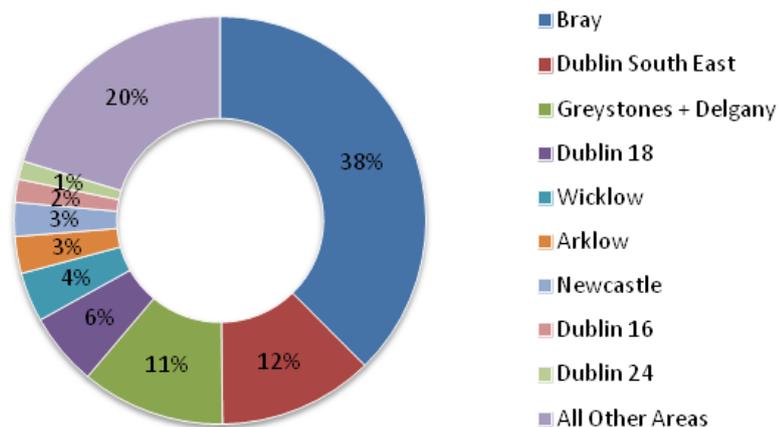
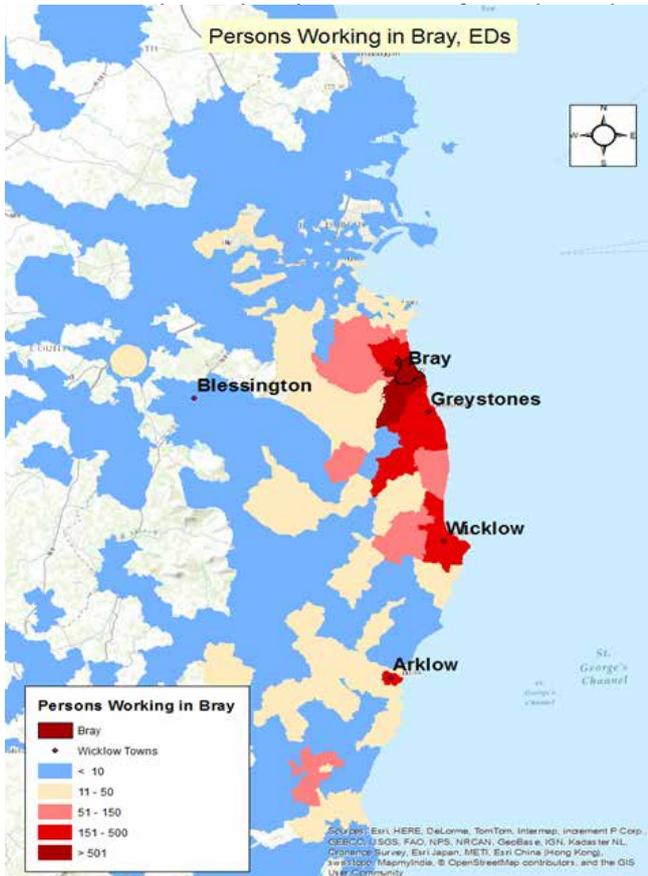


Figure 3-15 Place of Origin of People Employed in Bray



People working in Bray are from the north east of the County (Bray, Greystones, Wicklow areas) and the southern part of County Dublin.

Figure 3-16 Origin of people working in Bray

3.7.2 Wicklow-Rathnew



3.7.2.1 Settlement Boundary

The settlement boundary of Wicklow-Rathnew is shown in Figure 3-17 and corresponds with the area as defined by Wicklow County Council in preparing its County Development Plan.

3.7.2.2 Population

The population of Wicklow-Rathnew in 2011 was 13,468.

3.7.2.3 Education Profile

Figure 28 presents the percentage of residents of Wicklow-Rathnew that are employed and working both in Wicklow-Rathnew and outside of Wicklow-Rathnew based on education levels (i.e. up to secondary level attainment or third level or higher level attainment).

Figure 3-17 Wicklow-Rathnew Settlement Boundary

A higher percentage (45%) of Wicklow-Rathnew residents employed outside of the town have a third level or higher qualification, compared to residents employed within the town (39%). Of residents with a secondary level education (or lower), the data identifies that a higher percentage (59%) of secondary level educated residents are working within Wicklow-Rathnew, compared to those that are commuting out of Wicklow-Rathnew for employment (54%).

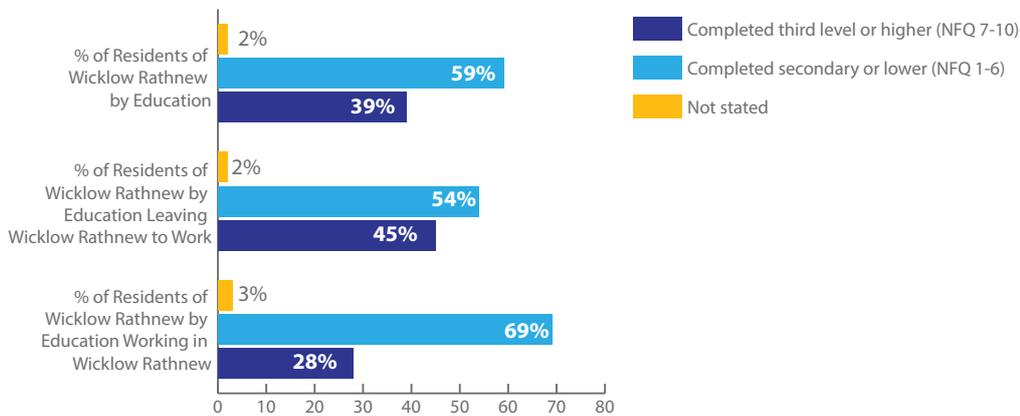


Figure 3-18 Education Levels of Persons Working Within and Outside of Wicklow-Rathnew

3.7.2.4 Employment Profile

Table 3-15 presents the numbers of people working in various industrial sectors within Wicklow-Rathnew, as categorised by the Central Statistics Office, Census 2011.

Table 3-15 Residents of Wicklow-Rathnew Working by industrial Group

Industrial Group	Total	% of Total
Manufacturing, mining and quarrying, Electricity, Gas,	451	12%
Construction	75	2%
Wholesale, Retail Trade, Transportation and Storage,	1,088	28%
Information and Communication, Financial, Real Estate,	803	21%
Public Administration and Defence; Compulsory Social Security	352	9%
Education, Human Health and Social Work Activities	842	22%
Other Service Activities	191	5%
Grand Total	3,866	100%

Table 3-15 shows that the highest number of Wicklow-Rathnew residents (28%) employed are working in Wholesale, Retail Trade, Transportation and Storage, while 22% are working within the sectors of Education, Human Health and Social Work Activities and 21% in Information and Communication, Financial, Real Estate sectors.

Table 3-16 Place of Work for Residents of Wicklow-Rathnew by Industrial Group

Place of Work	Total	Agriculture, forestry and fishing	Manufacturing, mining and quarrying, Electricity, Gas,	Construction	Wholesale, Retail Trade, Transportation and Storage,	Information and Communication, Financial, Real Estate,	Public Administration and Defence; Compulsory Social Security	Education, Human Health and Social Work Activities	Other Service Activities
Wicklow-Rathnew	1,340	7	76	18	482	171	182	307	82
South East	396	0	38	0	93	76	42	115	20
Bray	325	0	75	6	77	38	37	76	13
Dublin 1	103	0	3	0	25	56	9	8	2
Dublin 4	184	0	8	0	15	89	4	62	5
Greystones	84	1	0	10	26	31	16	29	12
Dublin 16	24	0	0	0	7	8	1	6	1
Totals	2,534	8	200	35	751	480	299	632	138
Other Areas	1,332	27	251	40	337	323	53	210	53
Grand Total	3,866	35	451	75	1088	803	352	842	191

Table 3-16 shows that the largest number (35%) of Wicklow-Rathnew residents (1,340 persons) are employed within Wicklow-Rathnew area, 482 of whom are working in Wholesale, Retail Trade, Transportation and Storage sectors. 10% (396 persons) are commuting to the Southeast region, of which 29% are working in Education, Human Health and Social Work Activities. 8% (325 persons) are travelling to Bray for employment. Those travelling to Bray are employed more evenly in various sectors including 24% in Wholesale, Retail Trade, Transportation and Storage; 23% respectively in Education, Human Health and Social Work Activities and Manufacturing, Mining and Quarrying, Electricity, Gas and 12% in Information and Communication, Financial, Real Estate sectors. While 311 people (9%) are travelling to Dublin Region for employment, nearly half (49%) are employed in the Information and Communication, Financial, Real Estate sector. As demonstrated in Figure 3-19, there is a significant proportion (34%) of people travelling to locations other than those listed, highlighting the dispersed employment commuting patterns of Wicklow-Rathnew residents. A large number of these are employed in the Wholesale, Retail Trade, Transportation and Storage sectors which by its nature would require more transient travel requirements.

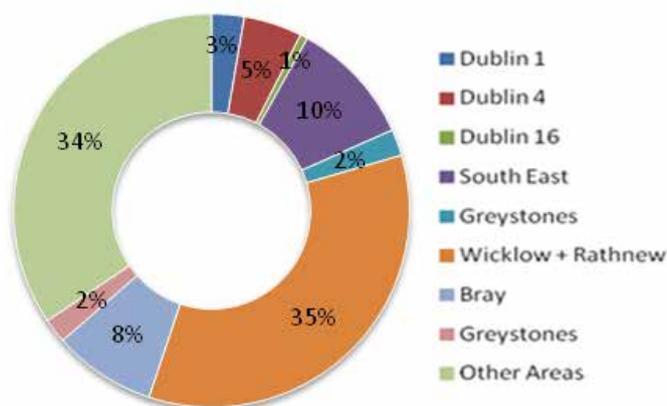
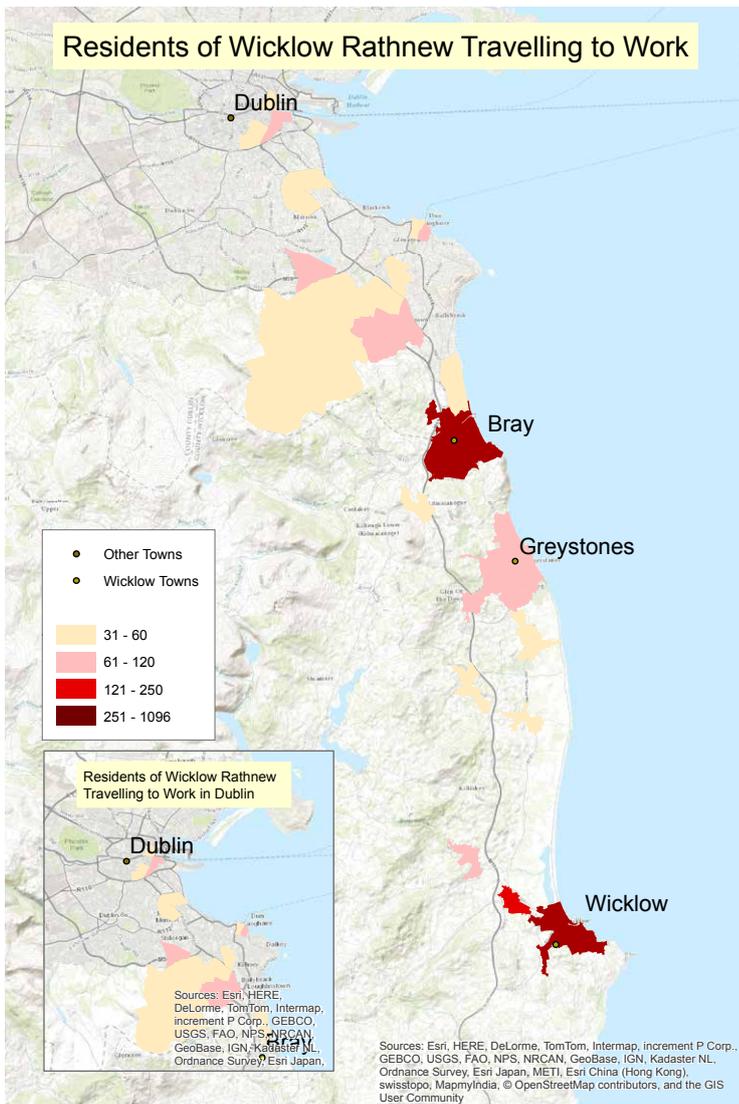


Figure 3-19 Location of Employment for Wicklow-Rathnew Residents

Based on data derived from the CSO POWSCAR database, the following map shows the employment commuting patterns of Wicklow-Rathnew residents. This map illustrates the relationship between Wicklow-Rathnew, its communities and employment commuting patterns as they relate to other settlements.



45% of all Wicklow Rathnew residents are working in either Wicklow-Rathnew itself or Greystones-Delany and Bray, a high proportion of whom are employed in Wholesale, Retail Trade, Transportation and Storage and Education, Human Health and Social Work Activities. Although not shown on the map, 10% commute to areas located within the southeast region.

Figure 3-20 Commuting Patterns of Residents of Wicklow-Rathnew

3.7.2.5 People In-Commuting To Wicklow-Rathnew For Employment

As part of this analysis, the in-commuting patterns to Wicklow-Rathnew for employment were examined. Table 3-17 shows the number of people commuting into Wicklow-Rathnew for employment. As shown, 45% (1,250) are from the local Wicklow-Rathnew area. A further 31% are from 'other areas' not listed by local area, signifying the dispersed nature of those commuting into Wicklow-Rathnew for employment. Of these from 'other areas', 56% are employed in either

'Public Administration and Defence; Compulsory Social Security' or 'Education, Human Health and Social Work Activities'. 225 persons (8%) are in-commuting from Dublin', the highest number of whom are working in Wholesale, Retail Trade, Transportation and Storage sectors. 6% are commuting to the town from Arklow, the highest number of which are working in 'Public Administration and Defence; Compulsory Social Security', while a further 8% are commuting from Greystones-Delany and Kilcoole areas combined.

Table 3-17 In-Commuting to Wicklow-Rathnew at Local Area Level

Place of Origin	Total	Manufacturing, mining and quarrying, Electricity, Gas,	Wholesale, Retail Trade, Transportation and Storage,	Information and Communication, Financial, Real Estate,	Public Administration and Defence; Compulsory Social Security	Education, Human Health and Social Work Activities	Other Service Activities
Wicklow - Rathnew	1,250	71	457	153	169	283	79
Dublin Region	225	20	66	41	25	59	6

Place of Origin	Total	Manufacturing, mining and quarrying, Electricity, Gas,	Wholesale, Retail Trade, Transportation and Storage,	Information and Communication, Financial, Real Estate,	Public Administration and Defence; Compulsory Social Security	Education, Human Health and Social Work Activities	Other Service Activities
Arklow	166	14	37	18	44	36	11
Greystones-Delgany	106	8	24	12	21	38	1
Ashford	67	2	20	14	8	13	3
Gorey	55	1	8	14	10	21	1
Kilcoole	40	3	11	2	17	5	2
Total Above	2,080	129	704	268	305	494	115
Other Areas	871	66	149	115	237	253	20
Total	2,780	185	772	369	531	708	123

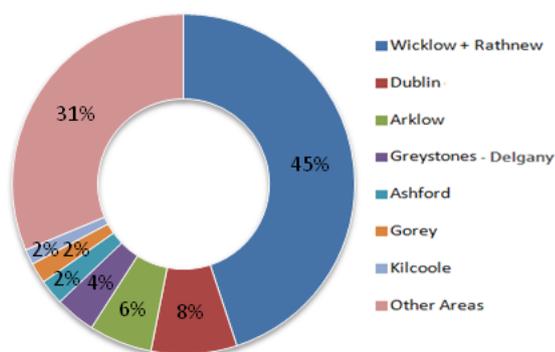
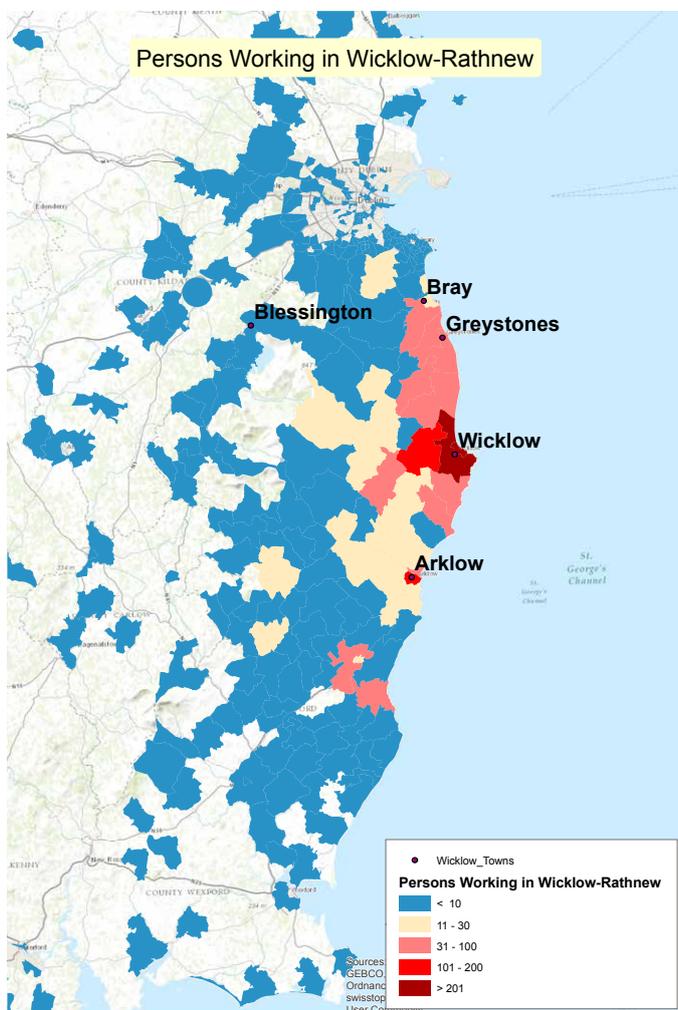


Figure 3-21 Place of origin of persons commuting to work in Wicklow-Rathnew

Table 3 18 shows in that the highest number of people working in Wicklow-Rathnew are employed in Wholesale, Retail Trade, Transportation and Storage (29%), while 25% are working within the sectors of Education, Human Health and Social Work Activities. 18% are employed in Public Administration and Defence; Compulsory Social Security sectors with 13% working in Information and Communication, Financial, Real Estate sectors.

Table 3 18 Persons Working in Wicklow-Rathnew by industrial Group

Industrial Group	Total	% of Total
Manufacturing, mining and quarrying, Electricity, Gas	195	7%
Construction	55	2%
Wholesale, Retail Trade, Transportation and Storage	853	29%
Information and Communication, Financial, Real Estate	383	13%
Public Administration and Defence; Compulsory Social Security	542	18%
Education, Human Health and Social Work Activities	747	25%
Other Service Activities	135	5%
Not Stated / Other	41	1%
Grand Total	2,951	100%



Based on data derived from the CSO POWSCAR database, the following map presents the commuting patterns of people travelling to Wicklow-Rathnew for employment.

As determined from Figure 3-22, Wicklow-Rathnew serves as an important economic focus for a local catchment, with a high level of those working in Wicklow-Rathnew from the immediate surroundings.

Figure 3-22 Commuting Patterns of people travelling to Wicklow-Rathnew for employment

3.7.3 Arklow

3.7.3.1 Settlement Boundary

The settlement of Arklow (Figure 3-23) analysed in this report correspond with the area as defined by Wicklow County Council in preparing its County Development Plan and is shown in Figure 3-23.

3.7.3.2 Population

The population of Arklow was 13,066 in 2011.

3.7.3.3 Education Profile

Figure 3-24 presents the percentage of residents of Arklow that are employed and working both in Arklow and outside of Arklow split on educational attainment.

The figure shows that a slightly higher percentage (35%) of Arklow residents employed outside of the town have a third level or higher qualification, compared to residents employed within the town (27%). Of residents with a secondary level education (or lower), the data identifies that a higher percentage (70%) of secondary level educated residents are working within Arklow, compared to those that are commuting out of Arklow for employment (63%).



Figure 3-23 Arklow Settlement Boundary

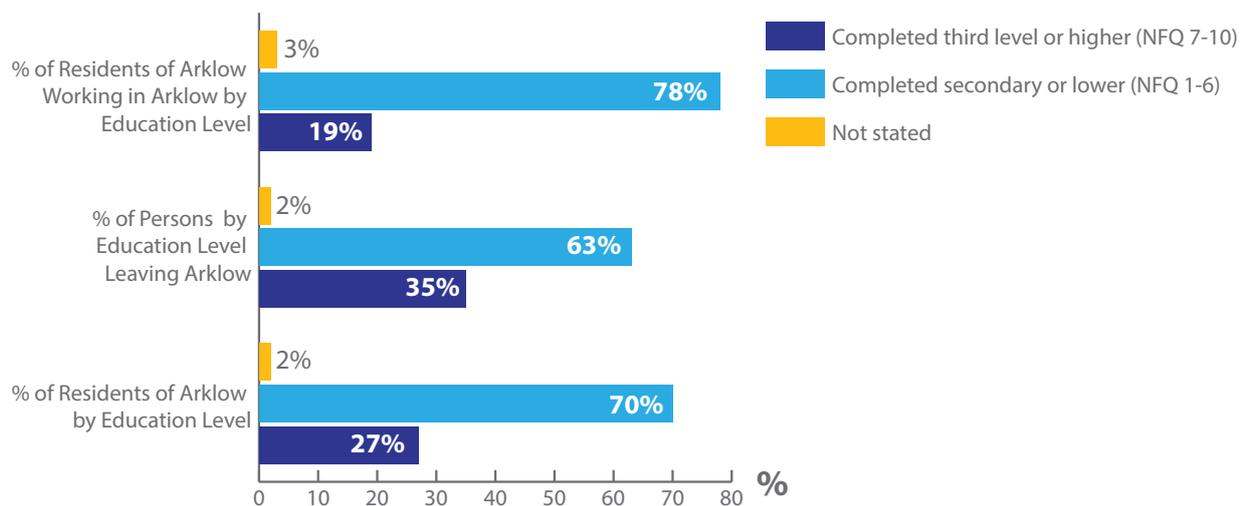


Figure 3-24 Education Levels of Persons Working Within and Outside of Arklow

3.7.3.4 Employment Profile

As part of the study, an in depth analysis of employment sectors and commuting patterns of residents from Arklow was undertaken. The primary purpose of this analysis is to observe the employment relationship between the resident population of Arklow, the employment sector within the town and its wider regional catchment in terms of employment and employees.

Table 3-19 presents the numbers of people working in various industrial groups as categorised by the Central Statistics Office, Census 2011.

Table 3-19 Employment of Arklow Residents by Industrial Group

Industrial Group	Total	% of Total
Manufacturing, mining and quarrying, Electricity, Gas,	619	17%
Construction	106	3%
Wholesale, Retail Trade, Transportation and Storage,	1,319	36%
Information and Communication, Financial, Real Estate,	581	16%
Public Administration and Defence; Compulsory Social Security	183	5%
Education, Human Health and Social Work Activities	647	18%
Other Service Activities	175	5%
Not Stated / Other Areas	62	2%
Grand Total	3,692	100%

Table 3-19 shows that 36% of the resident working population are employed in Wholesale, Retail Trade, Transportation and Storage sectors. Education, Human Health and Social Work Activities, Manufacturing, mining and quarrying, Electricity, Gas sectors and Information and Communication, Financial, Real Estate sectors employ a significant proportion of the working Arklow population.

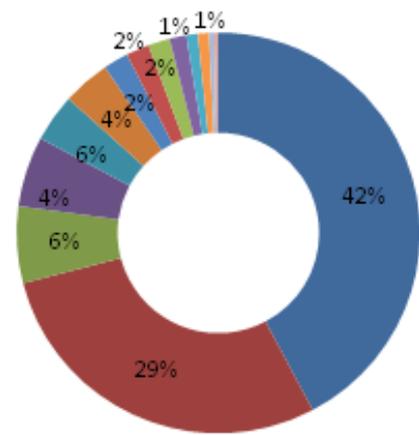
Table 3-20 Place of Work for Residents of Arklow by Industrial Group

Place of Work	Total	Manufacturing, mining and quarrying, Electricity, Gas,	Construction	Wholesale, Retail Trade, Transportation and Storage,	Information and Communication, Financial, Real Estate,	Public Administration and Defence; Compulsory Social Security	Education, Human Health and Social Work Activities	Other Service Activities
Arklow	1,560	123	38	804	160	45	273	93
Bray	228	78	2	43	42	9	51	3
Wicklow - Rathnew	141	8	3	27	13	44	35	10
Gorey	74	9	1	37	3	4	12	7
Wexford (Town)	50	6	1	16	10	5	9	1
Rathdrum	32	3		6	2	1	17	2
Greystones - Delgany	15	1		8	4	0	2	0
Kilcoole	13	0	3	5	0	0	4	1
Dublin Southeast	210	48	0	48	30	14	48	15
Dublin 1	34	0	0	9	17	2	3	3
Dublin 4	64	1	0	8	27	3	24	1
Dublin 18	142	18	0	39	60	1	19	3
Dublin 2	69	4	0	5	39	11	6	4
Total Above	2,632	299	1	1,055	407	139	503	143
All other areas	1,060	320	105	264	174	44	144	32
Grand Total	3,692	619	106	1,319	581	183	647	175

Table 3-20 shows that 42% of all Arklow residents working are employed in Arklow, showing the importance of the town as functional economic area for the local population. Over half of these (804 persons) are employed in Wholesale, Retail Trade, Transportation and Storage sectors. Of the 208 persons travelling to Bray to work, 34% of these are working in the Manufacturing, mining and quarrying, Electricity, Gas sectors. Of the 519 persons commuting to the identified Dublin regions (as specified in Table 3-20) for employment, 33% are working in the Information and Communication, Financial, Real Estate sectors.



Figure 3-25 Place of Work for Arklow Residents



- Arklow
- All Other Areas
- Bray
- Dublin Southeast
- D18
- Wicklow-Pathnew
- Gorey
- D2
- D4
- Wexford Town
- D1
- Pathrum
- Greystones-Delegary
- Kilcoole

Figure 3-26 Commuting Patterns of Residents of Arklow

Based on data derived from the CSO POWSCAR database, the following map shows the employment commuting patterns of Arklow residents. A high proportion are working within the Arklow area, while many are commuting northwards towards Greystones, Bray and further into south Dublin.

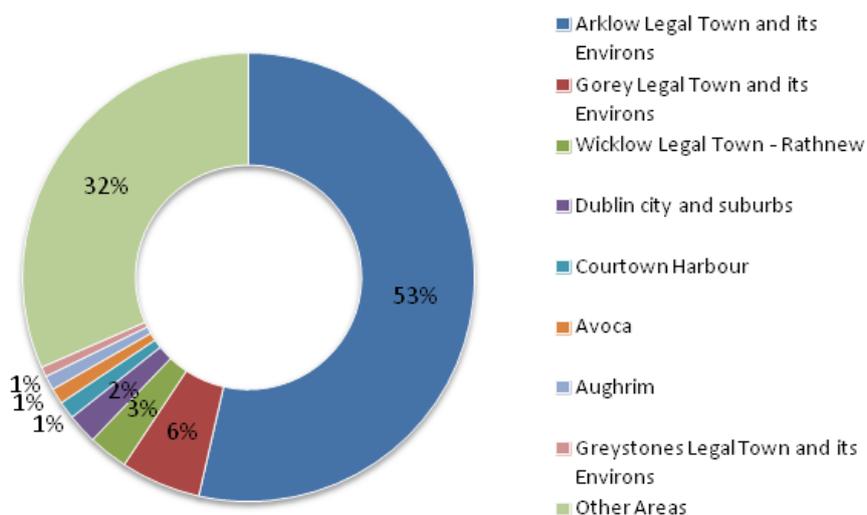
3.7.3.5 People In-Commuting To Arklow For Employment

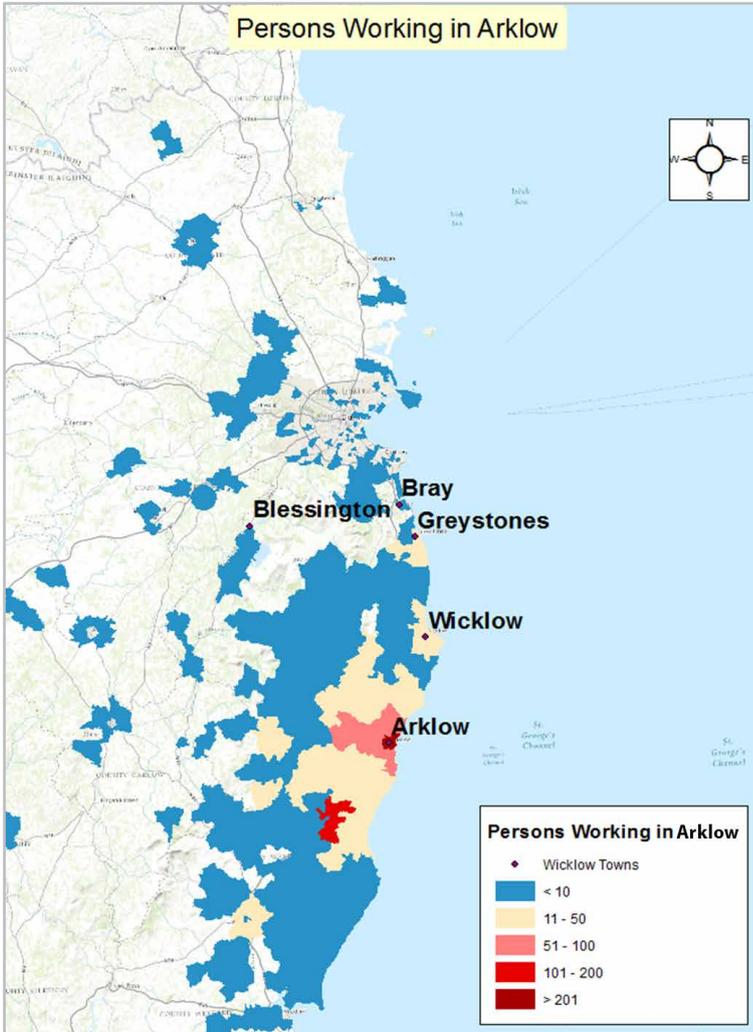
Table 3-21 show the number of people commuting into Arklow for employment. As shown, 53% (1,560) of in-commuters are from Arklow and its immediate environs, while the next highest settlement areas in which people are travelling to Arklow for work is from Gorey, with 6% (167 persons). The majority (52%) of Arklow workers from the town are employed in the 'Wholesale, Retail Trade, Transportation and Storage' sector. 32% (920 persons) of all persons working in Arklow are from 'other areas' not listed in the table, highlighting the dispersed nature of those commuting into Arklow.

Table 3-21 Persons Working in Arklow by Place of Origin and Industrial Group

Place of Origin	Total	Agriculture, forestry and fishing	Manufacturing, mining and quarrying, Electricity, Gas,	Construction	Wholesale, Retail Trade, Transportation and Storage,	Information and Communication, Financial, Real Estate,	Public Administration and Defence; Compulsory Social Security	Education, Human Health and Social Work Activities	Other Service Activities
Arklow	1,560	13	123	38	804	160	45	273	93
Gorey	167		14		63	15	14	47	12
Wicklow - Rathnew	83	0	5	1	32	12	3	23	6
Dublin	63		6	3	26	5	3	16	4
Courtown Harbour	37		2		12	2	4	14	3
Avoca	33		5	1	19	1	1	4	2
Aughrim	30	1	2	1	12	5	1	6	2
Greystones - Delgany	21		0	1	5	4	2	7	2
Total	1,994	14	157	45	973	204	73	390	124
Other Areas	920	8	60	25	306	149	76	238	52
Grand Total	2,914	22	217	70	1279	353	149	628	176

Figure 3-27 Place of Origin of Persons working in Arklow





further presented in Figure 3-28, which highlights the local importance of the town as an employment base and its role in employing in north Wexford.

Table 3-22 shows that the highest proportion of people working in Arklow are employed in the Wholesale, Retail Trade, Transportation and Storage sectors (44%), followed by 22% of people working in Education, Human Health and Social Work Activities.

Figure 3-28 Origin of Persons Working in Arklow

Industrial Group.

Table 3-22 Persons Working in Arklow By

Industrial Group	Grand Total	% of Total
Manufacturing, mining and quarrying, Electricity, Gas,	217	7%
Construction	70	2%
Wholesale, Retail Trade, Transportation and Storage,	1,279	44%
Information and Communication, Financial, Real Estate,	353	12%
Public Administration and Defence; Compulsory Social Security	149	5%
Education, Human Health and Social Work Activities	628	22%
Other Service Activities	176	6%
Not Stated / Other	42	1%
Grand Total	2,914	100%

3.7.4 Greystones-Delgany

3.7.4.1 Settlement Boundary

The settlement of Greystones-Delgany (Figure 42) analysed in this report correspond with the area as defined by Wicklow County Council in preparing its County Development Plan and is shown in Figure 3-29

3.7.4.2 Population

The population of Greystones-Delgany was 17,208 in 2011.

3.7.4.3 Education Profile



Figure 3-30 presents the percentage of residents of Greystones-Delgany that are employed and working both in Greystones-Delgany and outside of Greystones-Delgany split on educational attainment. The figure shows that a higher percentage (43%) of Greystones-Delgany residents employed outside of the town have a third level or higher qualification, compared to residents employed within the town (29%).

Figure 3-29 Greystones-Delgany Settlement Boundary

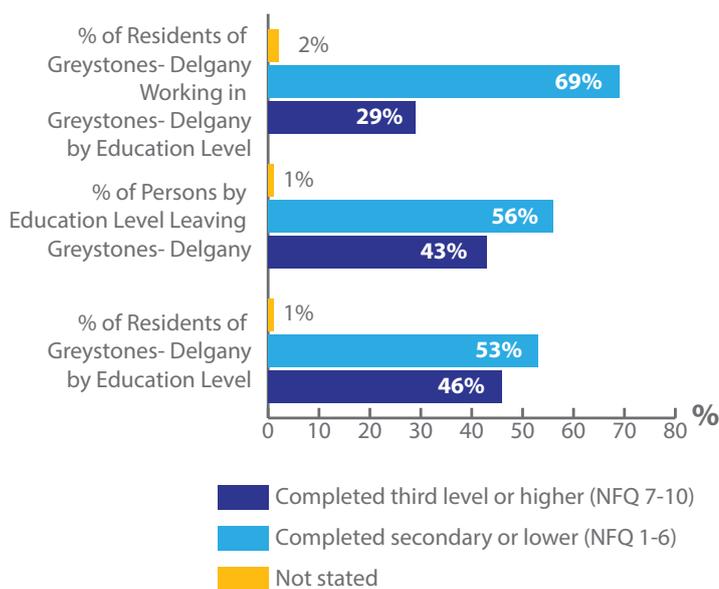


Figure 3-30 Education Levels of Persons Working Within and Outside of Greystones-Delgany

3.7.4.4 Employment Profile

Table 3-23 presents the numbers of people working in Greystones-Delgany by industrial group.

Table 3-23 Residents of Greystones-Delgany Working by Industrial Group

Industrial Group	Total	% of Total
Manufacturing, mining and quarrying, Electricity, Gas,	552	9%
Construction	128	2%
Wholesale, Retail Trade, Transportation and Storage,	1,290	21%
Information and Communication, Financial, Real Estate,	1,988	33%
Public Administration and Defence; Compulsory Social Security	330	5%
Education, Human Health and Social Work Activities	1,387	23%
Other Service Activities	325	5%
Not Stated / Other	55	1%
Grand Total	6,055	100%

Table 3-26 shows that the highest number of Greystones-Delgany residents employed are working in 'Information and Communication, Financial, Real Estate sectors' (33%), while 23% are working within the sectors of 'Education, Human Health and Social Work Activities' and 21% in 'Wholesale, Retail Trade, Transportation and Storage' sectors.

Table 3 24 Place of Work for Residents of Greystones - Delgany by Industrial Group

Place of Work	Total	Manufacturing, mining and Quarrying, Electricity, Gas,	Wholesale, Retail Trade, Transportation and Storage,	Information and Communication, Financial, Real Estate,	Public Administration and Defence; Compulsory Social Security	Education, Human Health and Social Work Activities	Other Service Activities
South East Dublin	795	61	142	203	48	294	30
Greystones-Delgany	752	19	326	87	12	222	65
Dublin 2	735	31	68	430	78	91	28
Wicklow-Rathnew	719	133	172	142	32	190	41
Bray	690	127	156	139	32	187	41
Dublin 18	643	85	107	328	6	79	17
Dublin 1	311	11	44	192	25	20	13

Place of Work	Total	Manufacturing, mining and Quarrying, Electricity, Gas,	Wholesale, Retail Trade, Transportation and Storage,	Information and Communication, Financial, Real Estate,	Public Administration and Defence; Compulsory Social Security	Education, Human Health and Social Work Activities	Other Service Activities
Kilcoole	135	9	56	26	0	29	4
Dublin 6	101	1	15	22	14	38	8
Dublin 4	466	16	35	258	25	119	8
Newtownmountkennedy	49	8	15	4	1	16	2
Kilmacanogue	40	11	14	6	0	8	1
Total Above	5,436	512	1,150	1,837	273	1,293	258
All other areas	619	40	140	151	57	94	67
Grand Total	6,055	552	1,290	1,988	330	1,387	325

There is a high rate of commuting into the Dublin City and south regions. 27% (1,613 persons) of all employed Greystones-Delgany residents are working in the Dublin district areas of Dublin 1, Dublin 2, Dublin 4 and Dublin 6. Of the numbers commuting to Dublin 1, Dublin 2 and Dublin 4 areas, over half are employed in the Information and Communication, Financial, Real Estate sector and commuting (62% in D1; 59% in D2 and 55% in D4 respectively). A further 11% (643 persons) are working in Dublin 18, 51% of whom are in the Information and Communication, Financial, Real Estate sector. 12% of all Greystones-Delgany residents working are employed in the local Greystones-Delgany area, while a further 11% are working in Bray. 13% of Greystones-Delgany workers are employed in the southeast Dublin region (795 persons), of which 294 people are working in 'Education, Human Health and Social Work Activities'.

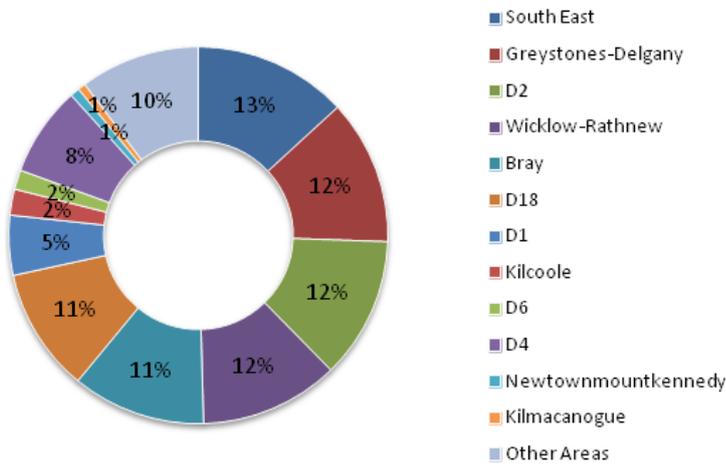
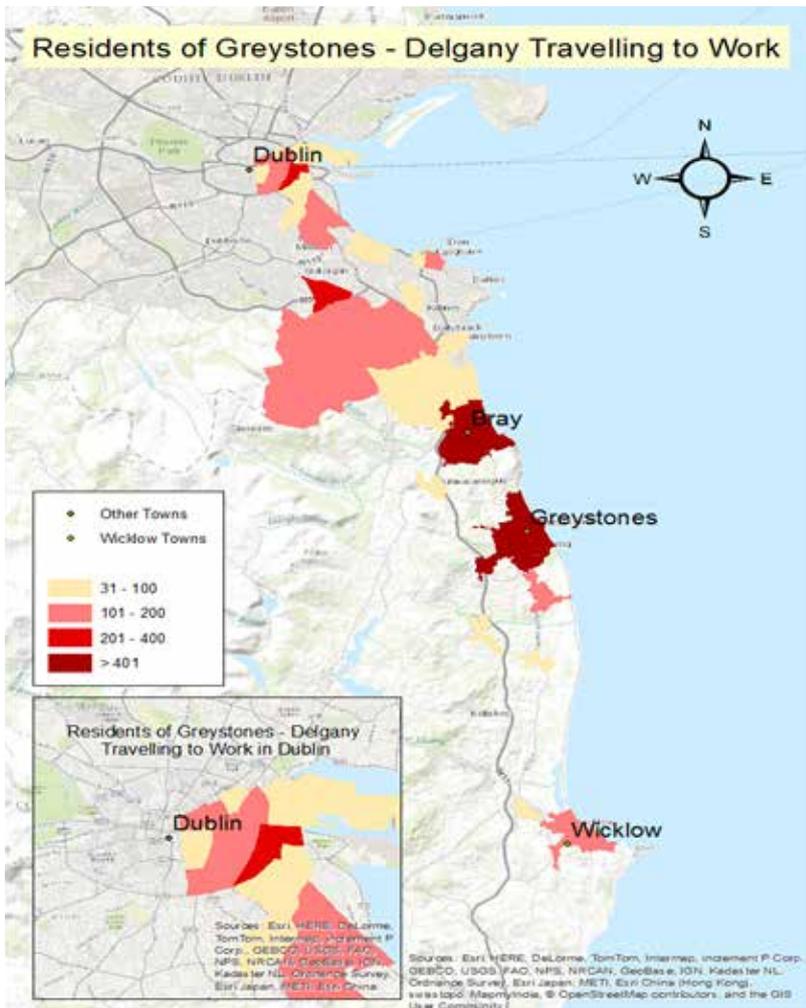


Figure 3-31 Percentage of Greystones-Delgany Residents by Place of Work



Based on data derived from the CSO POWSCAR database, Figure 3-32 presents the spatial distribution of residents commuting out of Greystones-Delgany for employment.

Figure 3-32 Commuting Patterns of Residents of Greystones-Delgany

3.7.4.5 People In-Commuting To Greystones-Delgany For Employment

Table 3-25 shows the number of people commuting into Greystones-Delgany for employment. Over 75% of all in-commuters to work in Greystones-Delgany are from County Wicklow, with 42% of workers from Greystones-Delgany and environs. Approximately 14% (262 persons) are from Dublin, 29% of whom are employed in Education, Human Health and Social Work Activities and 28% of whom are employed in Wholesale, Retail Trade, Transportation and Storage sectors. 250 persons are employed in the Information and Communication, Financial, Real Estate sectors in contrast to the much higher numbers that are commuting out of Greystones-Delgany to work in this sector.

Table 3-25 In-commuting to Greystones-Delgany at Local Level

Place of Origin	Total	Manufacturing, mining and quarrying, Electricity, Gas	Construction	Wholesale, Retail Trade, Transportation and Storage	Information and Communication, Financial, Real Estate	Public Administration and Defence; Compulsory Social Security	Education, Human Health and Social Work Activities	Other Service Activities
Greystones- Delgany	752	19	16	326	87	12	222	65
County Dublin	262	12	8	75	53	8	77	28
Bray	214	4	3	77	21	1	78	28
Arklow	126	4	4	32	23	6	44	12
Kilcoole	118	1	2	57	11	1	32	14
Newtown-mountkennedy	58	1	1	28	5	1	14	8
Wicklow-Rathnew	54	0	1	18	7	6	20	2
Kilpedder	26	0	0	14	4	1	7	0
Newcastle	21		0	10	3		5	3
Total Above	1,631	41	35	637	214	36	499	160
Other Areas	177	1	4	54	36	13	53	15
Grand Total	1,808	42	39	691	250	49	552	175

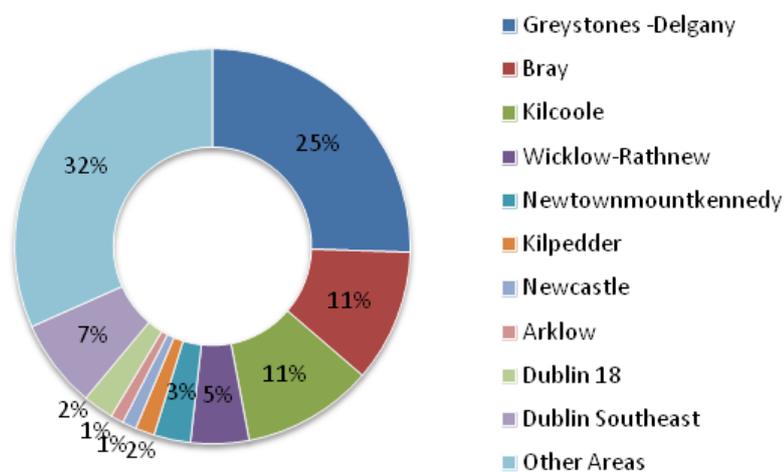


Figure 3-33 Place of origin of persons commuting to work in Greystones-Delgany

Based on data derived from the CSO POWSCAR database, Figure 3-34 presents the commuting patterns of persons working in Greystones-Delgany. This illustrates the relationship between Greystones-Delgany, its communities and employment commuting patterns as they relate to other settlements. Figure 3-34 shows the extent of commuting into Greystones-Delgany area for

employment. The majority of in-commuting is from the local Greystones-Delgany area; however there is a pattern of commuters travelling into Greystones-Delgany from along the eastern coast ranging from Bray down as far as Wicklow Town.

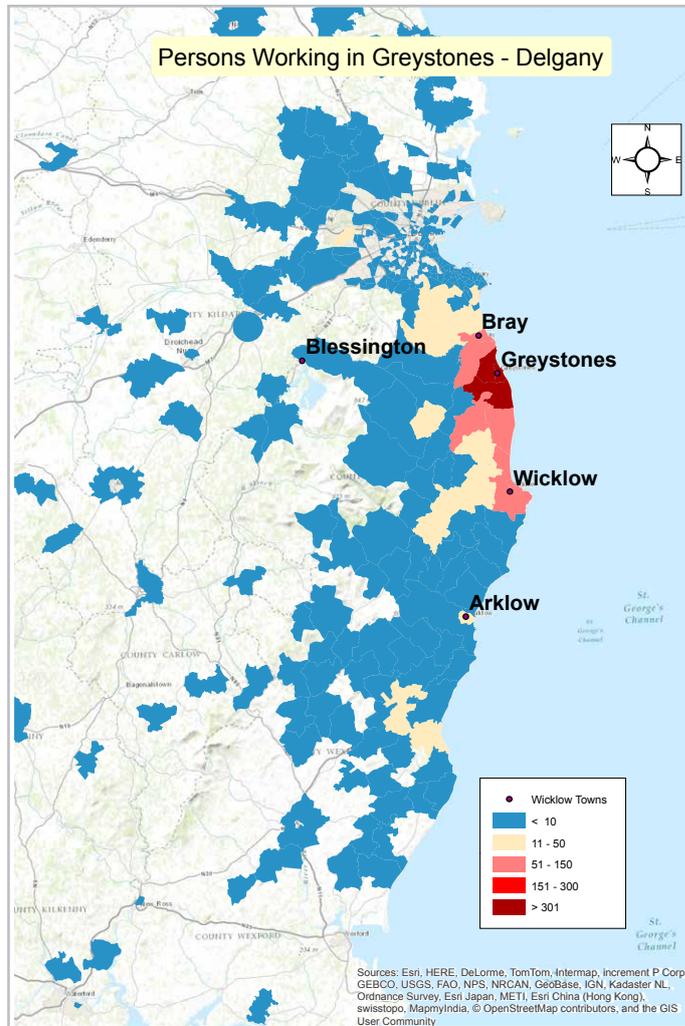


Figure 3-34 Spatial Map showing the Origin of Persons Working in Greystones-Delgany

The highest proportion of people working in Greystones-Delgany are employed in the 'Wholesale, Retail Trade, Transportation and Storage' sectors (38%) as demonstrated in Table 3-26, followed by 31% (552 persons) working in 'Education, Human Health and Social Work Activities'. 14% (250 persons) are employed in the Information and Communication, Financial, Real Estate sectors.

Table 3-26 Persons Working in Greystones - Delgany by Industrial Group

Industrial Group	Total	% of Total
Manufacturing, mining and quarrying, Electricity, Gas,	42	2%
Construction	39	2%
Wholesale, Retail Trade, Transportation and Storage,	691	38%
Information and Communication, Financial, Real Estate,	250	14%
Public Administration and Defence; Compulsory Social Security	49	3%
Education, Human Health and Social Work Activities	552	31%
Other Service Activities	175	10%
Grand Total	1,808	100%

3.7.5 Blessington



3.7.5.1 Settlement Boundary

The settlement of Blessington (Figure 3-35) analysed in this report correspond with the area as defined by Wicklow County Council in preparing its County Development Plan and is shown in Figure 3-35.

3.7.5.2 Population

The population of Blessington was 4,780 in 2011.

3.7.5.3 Education Profile

Figure 3-36 presents the percentage of residents of Blessington that are employed and working both in Blessington and outside of Blessington split on educational attainment.

Figure 3-35 Blessington Settlement Boundary

The figure shows that a lower percentage (30%) of Blessington residents employed outside of the town have a third level or higher qualification, compared to residents employed within the town (34%). Of residents with a secondary level education (or lower), the data identifies

that a higher percentage (68%) of secondary level educated residents are working outside of Blessington, compared to those that are employed within Blessington (66%).

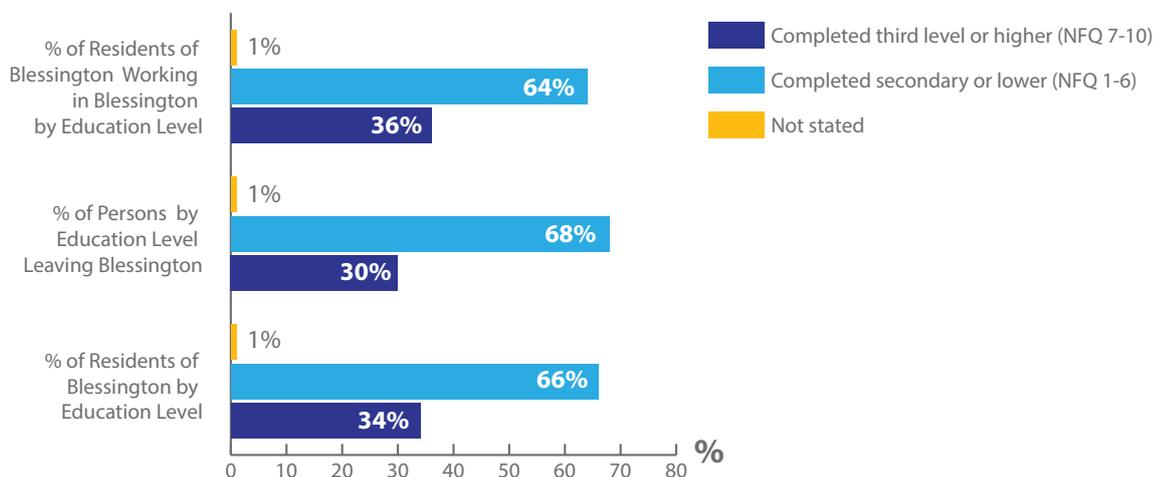


Figure 3-36 Education Levels of Persons Working Within and Outside of Blessington

3.7.5.4 Employment Profile

As part of the study, an in depth analysis of employment sectors and commuting patterns of residents from Blessington was undertaken. The primary purpose of this analysis is to observe the employment relationship between the resident population of Blessington, the employment sector within the town and its wider regional catchment in terms of employment and employees. Table 3-27 presents the numbers of Blessington residents working according to industrial group.

Table 3-27 Residents of Blessington Working by Industrial Group

Industrial Group	Total	% of Total
Manufacturing, mining and quarrying, Electricity, Gas,	351	19%
Construction	66	4%
Wholesale, Retail Trade, Transportation and Storage,	547	30%
Information and Communication, Financial, Real Estate,	321	18%
Public Administration and Defence; Compulsory Social Security	105	6%
Education, Human Health and Social Work Activities	333	18%
Other Service Activities	70	4%
Not Stated / Other	12	1%
Grand Total	1,805	100%

Table 3-27 shows that the highest proportion (30%) of Blessington residents employed are working in Wholesale, Retail Trade, Transportation and Storage sectors, while 19% are working within the sectors of Manufacturing, mining and quarrying, Electricity, Gas sectors (351 persons). 18% respectively are employed in Education, Human Health and Social Work Activities (333 persons) and Information and Communication, Financial, Real Estate sectors (321 persons). Table 3-28 presents the numbers of people working according to industrial group and the location in which they are working.

Table 3-28 Place of Work for Residents of Blessington by Industrial Group

Place of Work	Total	Manufacturing, mining and quarrying, Electricity, Gas,	Construction	Wholesale, Retail Trade, Transportation and Storage,	Information and Communication, Financial, Real Estate,	Public Administration and Defence; Compulsory Social Security	Education, Human Health and Social Work Activities	Other Service Activities
Blessington ¹⁴	431	151	15	167	28	3	49	17
Dublin 24 ¹⁵	281	34	5	86	41	21	85	9
Dublin 22 ¹⁶	153	35	8	61	30	5	10	3
Dublin Southwest	99	21	7	38	18	2	10	3

Place of Work	Total	Manufacturing, mining and quarrying, Electricity, Gas,	Construction	Wholesale, Retail Trade, Transportation and Storage,	Information and Communication, Financial, Real Estate,	Public Administration and Defence; Compulsory Social Security	Education, Human Health and Social Work Activities	Other Service Activities
Naas Urban	57	2	2	17	11	2	20	1
Above Areas	1,021	243	37	369	128	33	174	33
All other areas	784	108	29	178	193	72	159	37
Total All Areas	1,805	351	66	547	321	105	333	70

Table 3-28 shows that 431 persons (24%) of all working Blessington residents are employed in their local area with 30% of these employed in 'Wholesale, Retail Trade, Transportation and Storage' sectors. A further 16% are working in Dublin 24, while 8% are working in Dublin 22 region. Approximately 30% respectively of all persons resident in Blessington and employed in Dublin 24 are working in 'Wholesale, Retail Trade, Transportation and Storage' sectors and 'Education, Human Health and Social Work Activities'.

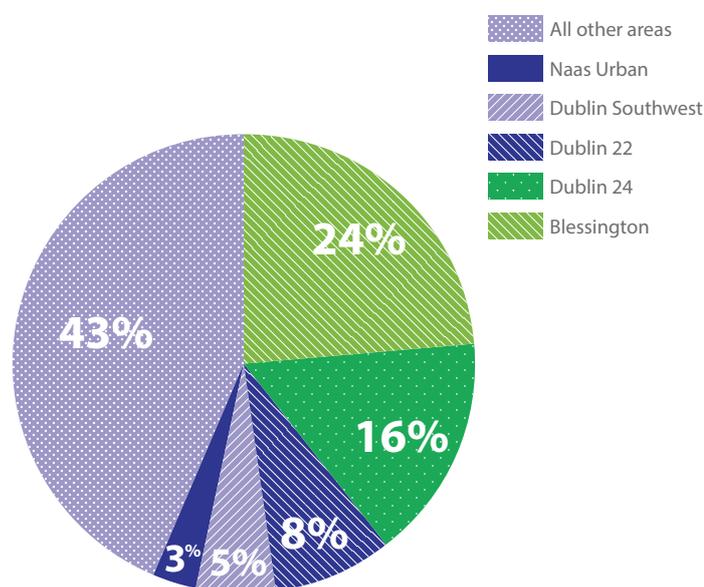


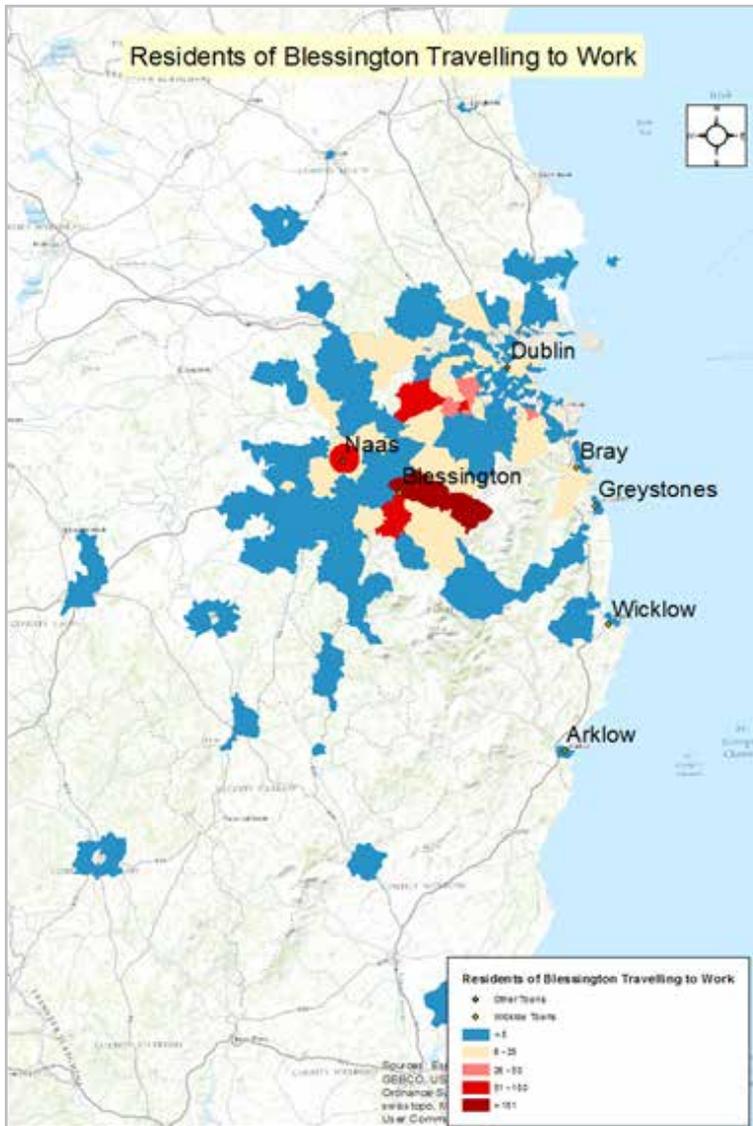
Figure 3-37

Proportion of Blessington Residents by Place of Work

14 Blessington includes the ED of Burgage

15 Dublin 24 primarily comprises the west Dublin areas of Tallaght, Firhouse, and Jobstown and borders the Dublin/Wicklow mountains

16 Dublin 22 primarily comprises the west Dublin areas of Clondalkin, Quarryvale, Liffey Valley and Neilstown and also adjoins County Kildare



Based on data derived from the CSO POWSCAR database, Figure 3-38 presents the out-commuting patterns of residents from Blessington for employment. The primary focus of this analysis was to observe the employment relationship between the resident population and their wider regional catchment. 24% of Blessington residents are working in the local Blessington area. As shown in Figure 3-38 there is widespread commuting towards Naas and southwest Dublin regions where approximately 30% of all employed Blessington residents are working.

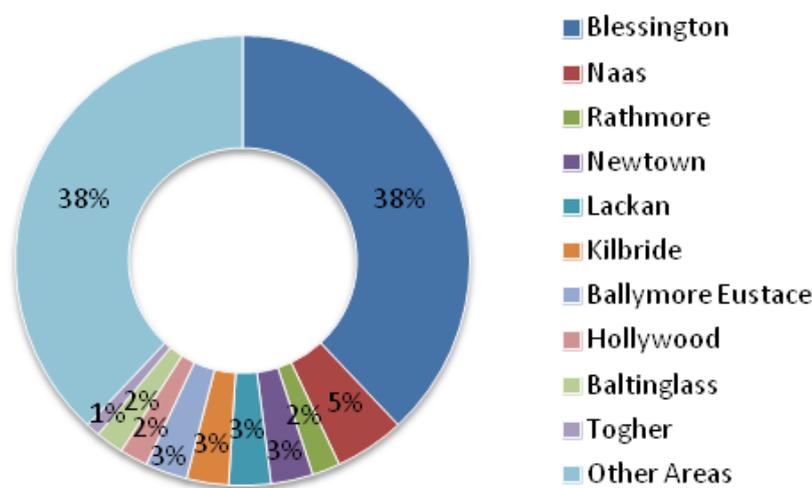
Figure 3-38 Commuting Patterns of Residents of Blessington

3.7.5.5 People In-Commuting To Blessington For Employment

As part of this analysis, the in-commuting patterns in to Blessington for employment were examined. Table 3-29 shows the number of people commuting into Blessington for employment. As shown, 42% of those are from the local Blessington area. 34% of people are in-commuting from 'other areas' not listed by name in Table 3-29, indicating a dispersed commuting catchment. 322 persons (34%) in-commuting to Blessington are employed in the 'Wholesale, Retail Trade, Transportation and Storage' sectors, while 266 persons (27%) are working in 'Manufacturing, mining and quarrying, Electricity, Gas' sectors.

Table 3-29 In-commuting to Blessington at Local Level

Place of Origin	Total	Manufacturing, mining and quarrying, Electricity, Gas,	Construction	Wholesale, Retail Trade, Transportation and Storage,	Information and Communication, Financial, Real Estate,	Public Administration and Defence; Compulsory Social Security	Education, Human Health and Social Work Activities	Other Service Activities
Blessington ¹⁷	415	139	13	163	33	4	46	16
Naas	45	19	4	10	4	1	6	1
Newtown	34	15	-	13	2	-	2	2
Lackan	34	11	-	12	5	-	3	2
Kilbride	32	2	1	12	6	-	10	-
Ballymore Eustace	26	9	-	7	-	-	6	4
Rathmore	21	4	1	10	-	1	4	1
Hollywood	18	4	-	3	3	1	4	3
Baltinglass	16	3	1	5	2	1	3	1
Togher	13	1	1	8	1	-	2	
All Areas Above	654	207	21	243	55	8	86	30
All other Areas	330	59	19	89	56	17	65	24
Grand Total	984	266	40	332	111	25	151	54



Based on data derived from the CSO POWSCAR database, the following map presents the number of workers commuting into Blessington for employment. This illustrates the relationship between Blessington, its communities and employment commuting patterns as they relate to other settlements. Figure 3-40 shows the extent of commuting into Blessington area for employment. The town largely serves its own residential base with a small level of interaction with a wider catchment.

Figure 3-39 Place of origin of persons commuting to work in Blessington

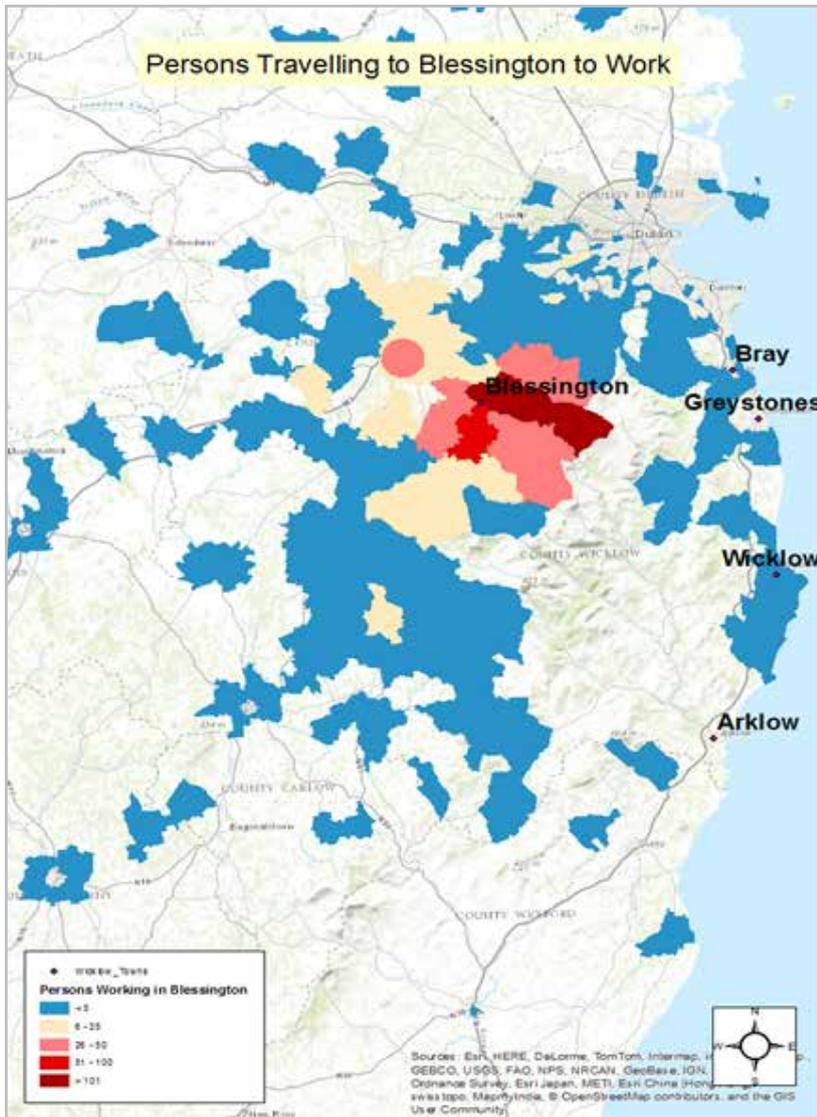


Table 3-30 shows that 34% of all people working in Blessington are employed within the Wholesale, Retail Trade, Transportation and Storage sectors, while 27% are employed in Manufacturing, mining and quarrying, Electricity, Gas sectors. 15% of all employees are working in Education, Human Health and Social Work Activities.

Figure 3-40 In-commuting patterns of employees to Blessington

Table 3-30 Persons Working in Blessington by Industrial Group

Industrial Group	Total	% of Total
Manufacturing, mining and quarrying, Electricity, Gas,	266	27%
Construction	40	4%
Wholesale, Retail Trade, Transportation and Storage,	332	34%
Information and Communication, Financial, Real Estate,	111	11%
Public Administration and Defence; Compulsory Social Security	25	3%
Education, Human Health and Social Work Activities	151	15%
Other Service Activities	54	5%
Not Stated / Other	5	1%
Grand Total	984	100%

4 Enterprise

Job creation, enterprise development and economic growth are key to the development of the County. An assessment of the County’s enterprise structure was undertaken with information obtained where possible from the relevant bodies.

4.1 Wicklow Local Enterprise Office

Wicklow Local Enterprise Office (LEO) provides support services including business advisory services, networking, management development and training, to private enterprise with the objective of creating jobs. Data provided from the Wicklow LEO (2015) determines that there are over 5,300 micro enterprises¹⁷ operating in County Wicklow (based on CSO 2012 data), operating in a wide variety of sectors including retail, construction, hospitality, professional services, agriculture, tourism, engineering, food & beverage manufacture, ICT, personal services etc. Approximately 75% (2012 figure) of micro enterprises trade in the Irish economy only.

In 2014, the Wicklow LEO managed 645 new enquiries, provided training supports to over 650 business people; provided one to one business advice and mentoring services to in excess of 300 businesses and engaged with more than 1,000 students to develop enterprise awareness within the County. By year end 2014, 97 Wicklow LEO client companies had received Enterprise Ireland grant aid. These employ 450 whole-time equivalent employees, and there was a net increase of 106 jobs during 2014. Furthermore, approximately €530,000 was approved to 29 Enterprise Ireland client projects in Wicklow in 2014.

In its report ‘County Wicklow Enterprise Plan 2015’, the Wicklow LEO has identified a high level of necessity based entrepreneurship (compared to opportunity based entrepreneurship) with a figure of 19% in 2013 compared with 6% in 2007. Also there remains on-going difficulty for small business in accessing finance

4.2 IDA Ireland

Data (2014) from IDA Ireland shows that there are currently 19 IDA client companies located in County Wicklow. These companies cover a range of sectors as presented in Table 4-1.



Figure 4-1 Numbers of IDA Client Companies in Wicklow by Settlement

Number of IDA Client Companies



Table 4-1 IDA Client Companies in Wicklow by Sector

Industry Sector	No. of IDA Client Companies in Wicklow
Engineering	5
BioPharma & Medical Devices	7
Internet & Computer Technology	6
Financial Services	1
Total	19

Table 4-2 IDA Job Creation Figures for County Wicklow

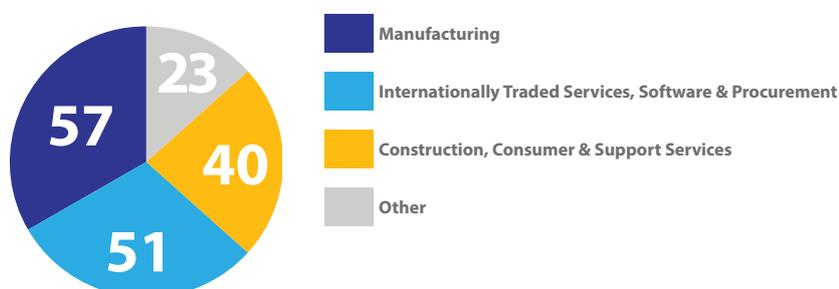
	2012	2013	2014
No of Companies	19	19	19
Total Jobs	2,397	2,413	2,342
Gross Gain	105	73	35
Gross Losses	-105	-57	-106
Net Change	0	16	-71

17 10 or less employees

4.3 Enterprise Ireland

There are currently 171 Enterprise Ireland supported companies located in the County. Figure 4-2 presents the breakdown of companies according to sector type. As shown, 'Manufacturing' and 'Internationally traded services, software and procurement' companies comprise 63% of all Enterprise Ireland companies in the County.

Figure 4-2 Enterprise Ireland Client Companies in County Wicklow



4.4 Film Industry

Wicklow has developed a unique film industry within the County, the County Wicklow Economic Think Tank: Action Plan (2015) highlights the need to capitalise on this opportunity, as a means to drive investment and job creation in the County. The Action Plan states that 'If managed effectively the County could leverage up to €1bn in inward investment and up to 5,000 jobs from this opportunity alone.'

To identify the number of film related businesses within County Wicklow a review of the Geodirectory database was undertaken. The analysis reveals the substantial direct film related sectors operating within the county, with twenty-six film, video and television production related companies located within the county.

Table 4-3 Film related enterprise in County Wicklow

Category	Number
Motion Picture, Video And Television Programme Production Activities	22
Motion Picture Projection Activities	1
Television Programming And Broadcasting Activities	3

In addition, Arts related businesses were reviewed using Geodirectory to identify other cultural and supporting businesses.

Table 4-5 Cultural, arts, enterprises located in County Wicklow

Description Of Enterprise	Number
Artistic Creation	12
Botanical And Zoological Gardens And Nature Reserve Activities	3
Library And Archives Activities	15
Museums Activities	16
Operation Of Arts Facilities	6

Operation Of Historical Sites And Buildings And Similar Visitor Attractions	14
Performing Arts	7
Grand Total	73

Thirdly, the IT and communications sector was reviewed for its potential contribution to Film and broadcasting.

Table 4-4 *IT and Communications enterprises located in County Wicklow*

Description Of Enterprise	Number
Computer Consultancy Activities	3
Computer Programming Activities	29
Motion Picture Projection Activities	1
Motion Picture, Video And Television Programme Production Activities	22
Other Information Service Activities	5
Other Information Technology And Computer Related Activities	26
Other Telecommunications Activities	8
Publishing Of Books, Periodicals And Other Publishing Activities	8
Publishing Of Newspapers	5
Radio Broadcasting	2
Television Programming And Broadcasting Activities	3
Telecommunications	8
Wired Telecommunications Activities	6
Grand Total	132

4.5 Summary

The County's proximity to Dublin, good infrastructure, strong commercial base and proximity to other business networks, alongside its ability to provide an educated and skilled workforce is a strong draw for attracting multinationals to the County. However suitable infrastructure including transportation infrastructure, water services, energy, telecommunications, waste management, housing availability, education facilities and childcare support are key to ensure the facilitation of future economic development activity within County Wicklow. The County Development Plan highlighted critical deficiencies in water supplies throughout the County and failure to provide adequate water services will impact negatively on attracting industries and services to the County. Industry types that require good water services include Beverage, food production, Biotech/Pharmaceutical, Chemical, and Technology/electronics industries.

5 Retail

The economic recession has impacted severely on the retail industry nationally, with a significant fall in retail sales and the closure of many retail outlets. Wicklow has been significantly impacted, with high vacancy rates especially prevalent within town centres. However over the past twelve months, the retail industry has experienced an upturn with an 8.8% increase in retail sales recorded to year end -2014 (4.8% excluding motor trade sales). The household goods sector of furniture and lighting saw sales up by 19.8% in 2014 signifying a marked increase in consumer confidence. Notwithstanding the upturn in the retail trade, the economic outlook for retailers within the GDA and Wicklow remains challenging.

The Retail Hierarchy for the Greater Dublin Area determines Bray and Wicklow as Major Town Centres and County Town Centres Level Two; while Arklow, Greystones, Blessington and Baltinglass are designated as Level 3.

Level 2 County Town Centres are expected to have a full range of all types of retail services from newsagents to specialist shops and boutiques, department stores, food stores of all types, shopping centres and high level of mixed uses including the arts and culture to create a vibrant, living place. Such centres should be well connected and served by high quality public transport.

Level 3 Centres are expected to have a good range of comparison shopping though no large department stores or centres, with a mix of retail type, leisure & cultural facilities and a range of cafes and restaurants. At least one supermarket and smaller scale department store are required to meet local needs.

The five towns in this level are not uniform in their size or function, but yet all are appropriately located in Level 3. Arklow, Blessington and Baltinglass, while being very different in size, are all similar in the sense that they serve a wide catchment and are sufficiently distant from major or county town so as to make them the principal shopping destination in their areas. Arklow in particular has traditionally served as a market town for a wide area, and this traditional status has been reinforced by the development of the Bridgewater centre.

5.1 Retail Leakage

The problem of the leakage of retail spend from the County has been recognised for many years and is an issue that has been raised in several development plans and retail strategies. The Wicklow County Development Plan Retail Strategy 2010-2016 identified that the Mid East retained just €699 million or 52% of the comparison goods expenditure generated by its residents (2007 figures).

5.2 Existing Retail Floor space within County Wicklow

An updated survey of existing retail floor space within County Wicklow has been carried out by Wicklow County Council to inform the updated retail strategy. The survey findings are set out in Table 5-1.



Table 5-1

County Wicklow Retail Floor space Analysis 2015¹⁸

Baseline Assessment of Retail Floorspace 2015 (m² net)					
Centre	2015 Convenience (m²)	2015 Comparison Non bulky (m²)	2015 Comparison Bulky (m²)	Total	Total Vacancy (m²)
Bray	8923	7996	13041	29960	4608
Wicklow/Rathnew	3690	2710	2065	8465	512
Arklow	8390	13139	6117	27646	3983
Greystones/Delgany	8449	2730	870	12049	905
Blessington	3464	1728	312	5504	1457
Newtown	1205	756	50	2011	740
Rathdrum	528	312	505	1345	210
Ashford	425	373	2320	3118	145
Aughrim	357	159	54	570	148
Baltinglass	1820	1552	1044	4416	1108
Carnew	609	275	91	975	60
Enniskerry	565	250	0	815	60
Kilcoole	709	223	0	932	674
Tinahely	814	317	0	1131	420
Avoca	158	443	0	601	70
Donard	47	0	0	47	0
Dunlavin	680	80	40	800	120
Kilmacanogue	1000	760	0	1760	30
Newcastle	88	0	0	88	84
Roundwood	40	0	577	617	224
Shillelagh	152	25	0	177	150
Total	42113	33828	27086	103027	15708

Source: Wicklow County Council, 2015

¹⁸ The figures do not include floor space that is in use for non-retail services such as banks, post offices, hairdressers, launderettes, book-makers, takeaways, estate agents etc. In addition, the figures do not take into consideration retail floor space which has been permitted but not yet constructed.

5.3 Vacancy Rates

Table 5-2 presents the commercial vacancy rates in the main settlement towns within County Wicklow as derived from Geodirectory. As shown, Arklow has the highest vacancy rates of the five towns at 13.9%, while Greystones possesses the lowest vacancy rate at 7.2%.

Table 5-2 Commercial Vacancy Rates in the Main County Settlement Towns

Settlement	Not Vacant	Vacant	Grand Total	% Vacant
Arklow	496	80	576	13.9%
Bray	628	74	702	10.5%
Greystones	321	25	346	7.2%
Wicklow	429	55	484	11.4%

5.4 Retail Types

Analysis was conducted of the retail activities present in the County by settlement town. The following tables present by settlement area, the retail types and number of retail shops in each settlement. A full list of retail business in the towns is set out in Appendix 2.

Table 5-3 Bray Retail Classes

Retail Type	Total Number	Total %
Food	57	34%
Clothing	29	17%
Household	29	17%
Comparison	54	32%
Fuel	1	1%
Grand Total	170	100%

Table 5-4 Wicklow-Rathnew Retail Classes

Retail Type	Total Number	Total %
Food	32	33%
Clothing	13	13%
Household	17	18%
Comparison	33	34%
Fuel	2	2%
Grand Total	97	100%

Table 5-5 Arklow Retail Classes

Retail Type	Total Number	Total %
Food	42	32%
Clothing	42	32%
Household	17	13%
Comparison	22	17%
Fuel	7	5%
Grand Total	130	100%

Table 5-6 Greystones-Delgany Retail Classes

Retail Type	Total Number	Total %
Food	22	34%
Clothing	14	22%
Household	8	12%
Comparison	19	29%
Fuel	2	3%
Grand Total	65	100%

Table 5-7 Blessington Retail Classes

Retail Type	Total Number	Total %
Food	8	27%
Clothing	2	7%
Household	5	17%
Comparison	13	43%
Fuel	2	7%
Grand Total	30	100%

5.5 Consumer Sentiment

Data from the KBC Ireland/ESRI Consumer Sentiment Index¹⁹ increased in April 2015 on March 2015 figures. April's figures reading amongst the highest recorded since early 2006, signifying a positive improvement in consumer's expectations for the future. However, KBC Ireland/ESRI notes that consumers retain a cautious attitude with regard to the economic outlook. As regards consumers personal financial situation, KBC Ireland/ESRI report that consumers continue to maintain a positive outlook regarding their personal finances which increased by 10% between March 2014 and March 2015.

19 Consumer Sentiment Index, April 2015

6 Tourism

6.1 County Wicklow Tourism

Tourism forms an essential part of the County's economy. However overseas visitor numbers have declined by approximately 5% between 2010 and 2013, according to data derived from Fáilte Ireland, with revenue down a similar proportion (approximately 4% decrease) over the same period (refer to Table 6-1 and Table 6-2). In 2013, 39% of all overseas visitors were from Britain, with 38% from mainland Europe and 17% from North America, while all other visitors make up the remaining 6%.

A comparison of overseas visitors and revenue figures for 2010 and 2013 shows that there has been a decline in both British and mainland European visitors to County Wicklow by 11% and 9% respectively. Interestingly, the 11% fall in British visitors corresponds to a 45% fall in revenue from Britain based visitors. In contrast, while there was a 9% fall in mainland Europe based visitors, there was a 30% increase in revenue from mainland Europe based visitors over the same period.

Further comparison of 2010 and 2013 tourism figures shows a 6% increase in North American based visitors and a corresponding 20% increase in revenue spent, while visitor numbers from all other overseas regions increased by 44%, with a corresponding 100% rise in revenue over the same period.

Domestic visitor numbers increased by 15% in 2013, compared to 2010 figures, while revenue increased by 17% over the same period.

Table 6-1 Overseas and Domestic Visitors by Numbers and Revenue in 2013²⁰

	Wicklow 2013	Britain	Mainland Europe	N. America	Other Areas
Overseas Visitors	204,000	80,000	77,000	34,000	13,000
Overseas Revenue	€70 million	€19m	€30m	€12m	€10m
Domestic Visitors	194,000				
Domestic Revenue	€35m				

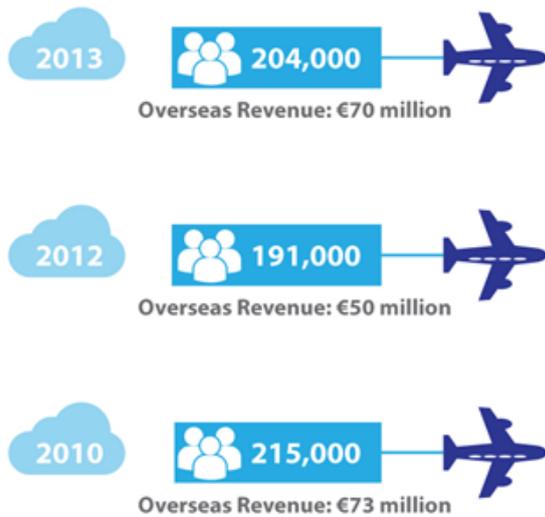
Table 6-2 Overseas and Domestic Visitors by Numbers and Revenue in 2010²¹

	Wicklow 2010	Britain	Mainland Europe	N. America	Other Areas
Overseas Visitors	215,000	90,000	85,000	32,000	9,000
Overseas Revenue	€73 million	€35m	€23m	€10m	€5m
Domestic Visitors	169,000				
Domestic Revenue	€30m				

Data Source: Fáilte Ireland (2014)

20 Source: Regional Tourism Performance in 2013 (2014), Fáilte Ireland
21 Source: Tourism to East and Midlands (Preliminary Data) 2010, Fáilte Ireland

Overseas Visitors Numbers



Data Source: Fáilte Ireland (2014)

County Wicklow receives the most overseas visitors and revenue income in the East and Midlands region (excluding Dublin) with 204,000 overseas visitors recorded in 2013. In 2013, overseas visitor revenue from tourism in the East and Midlands accounted for €287m, and Wicklow accounted for the highest proportion of this revenue with 24% (€70m) of the overall income, some €18m more than the next highest revenue producing area, County Kildare. While Wicklow outperforms all other East and Midlands counties in terms of visitor numbers, it is out-performed by all other counties along the coast, from County Wexford and all counties south/southwest to County Galway. Interestingly, while Wicklow only receives a quarter of the number of visitors compared to Kerry, it gets more revenue per visitor than Kerry.

Wicklow's proximity to Dublin offers significant opportunities to attract addition tourist numbers to the County, both day and overnight trips and further develop, promote and expand the industry within the County. Despite Wicklow's proximity to Dublin, its tourism revenue is far below that of Dublin, as presented in Table 6-3.



Figure 6-2 Overseas Visitors Revenue 2013

Table 6-3 Overseas Visitors by Numbers and Revenue 2013 in Counties Wicklow and Dublin

County	2013	Total	Britain	Mainland Europe	N. America	Other Areas
Wicklow	Visitors	204,000	80,000	77,000	34,000	13,000
	Revenue €m	70	19	30	12	10
Dublin	Visitors	3,998,000	1,251,000	1,637,000	772,000	338,000
	Revenue €m	1,401	243	605	303	251

Upon assessment of visitor profiling, visitors to East and Midlands regions are more likely to visit friends and relatives as opposed to holidays, double that of those visiting the west.

Wicklow County Tourism Marketing Plan 2015 highlights that most overseas spending is concentrated on accommodation and food. An assessment of the accommodation capacity of the County was completed and is presented in Table 6-4 below.

Table 6-4 County Wicklow Accommodation Capacity (2015)²²

Accommodation Type		Total	Rooms	Beds
Hotel 5 Star		2	345	848
Hotel 4 Star		4	282	650
Hotel 3 Star		12	647	1,637
Hotel 2 Star		4	62	129
Hotel 1 Star		2	33	72
Hotel (All)		24	1,369	3,336
Guesthouse		3	46	92
B&B		34	132	325
Self Catering	Listed	-	23	111
	Group Registered	2	18	114
Caravans & Campsites		4	381 (pitches)	1,624
Hostels		3	-	228

Data from the Wicklow County Tourism shows that East and Midlands region has the lowest percentage of visitors paying for accommodation. While visitor numbers to Wicklow are higher than many counties, the low occupancy levels within the East and Midlands region would imply that many visitors are day visitors.

6.2 Tourism-Related Enterprise

A review of the County's tourism related enterprises was undertaken using data derived from the GeoDirectory database. The data found that there are 629 tourism related enterprises in County Wicklow. Food and beverage services comprise 65% of enterprises with a total of 406 enterprises operating in the County.

Table 6-5 Tourism-Related Enterprise

Service	Description	Number Of Enterprises
Food & Beverage Services	Event Catering Activities	13
	Restaurants And Mobile Food Service Activities	212
	Beverage Serving Activities	181
Accommodation	Camping Grounds, Recreational Vehicle Parks And Trailer Parks	16
	Holiday And Other Short-Stay Accommodation	6
	Hotels And Similar Accommodation	32
	Other Accommodation	169
Total		629

6.3 Top 6 Wicklow Tourist Attractions 2009-2013

Fáilte Ireland publishes a list of the top visitor attractions in County Wicklow, based on a survey undertaken in 2013. Below are the top six County Wicklow attractions listed from Fáilte Ireland's paid Visitor Attractions Survey 2013, and the number of recorded visits²³ to each.

Table 6-1 Top County Wicklow Visitor Attractions

Wicklow Visitor Attraction	Number of Visitors 2013
Powerscourt House and Gardens	208,916
National Sealife Centre	100,000
Glendalough Visitor Centre	80,922
Russborough House	80,000
Kilmacurragh Gardens	51,500
Mount Usher Gardens	28,000

In addition to the paid or ticketed visitor attractions, substantial tourism and recreational numbers visit these and other attractions across the county, including Wicklow Mountains National Park and other places of natural beauty, in both its mountains and its coast line. County Wicklow is also rich in built heritage through its historic houses and buildings and its archaeological importance.

In 2015, Fáilte Ireland launched a new tourism initiative 'Ireland's Ancient East', which focuses on history and heritage in the east region and bring greater tourism attention and numbers to the region. The initiative came about following research in overseas markets, which has indicated that visitors would be more likely to come to Ireland to explore new landscapes, history and culture or simply to take time out from their busy lives and careers to connect with local heritage and nature. The initiative is aimed at two particular market segments; the 'Culturally Curious' (over 45 years age group) and the 'Great Escapers' (early 30s age group). Wicklow sites including Glendalough, Russborough House, Mount Usher Gardens and Powerscourt Gardens play a key role in the initiative, however there is potential to harness the increased interest and further develop the industry within the County, linking it with other themes.

The County Wicklow Economic Think Tank (CWETT) Action Plan endorses the pursuit of the development and promotion of Greenway projects within the County. The CWETT states 'Greenway development offers the potential to attract tourists to the County, provides a target route along which small businesses can develop and also the opportunity for various promotions to be linked to it'.

23 Figure refer to entrance fee paying visitors with the exception of Kilmacurragh Gardens

7 Agriculture

The following information has been derived from data sourced from the CSO Census of Agriculture 2010 and information contributed by the Irish Farmers Association (IFI). Agriculture remains a key part of Wicklow’s economy, despite the increasing numbers of population moving to urban areas and people working in other sectors, which offer higher incomes and access to social centres.

7.1 Wicklow Agricultural Profile

7.1.1 Farm Structure

The number of farms in the County totals 2,394, covering an area of 101,366ha. The average farm size in the County is 42.3ha. The total area of land under tillage is estimated at 9,198ha. The area of private lands under forestry totals 14,662ha.

For the purpose of statistical analysis, the CSO divides County Wicklow in to four rural districts as shown in Figure 7-1 below.

Figure 7-1 County Wicklow divided by Rural District



7.1.2 Age Profile of Farm Holders

Table 7-1 and Table 7-3 present the number of family farms by the age of the holder at county level and by rural district, and highlight the changes that have occurred in age of holder since 1991.

Table 7-1 Number of family farms by age of holder at County level

Age of holder	Year		
	1991	2000	2010
Under 35	416	326	144
35 to 44	546	559	436
45 to 54	623	624	634
55 to 64	574	470	568
65 and over	542	425	597
All Ages	2,701	2,404	2,379

Table 7-2 Number of Farms and Area Farmed by Rural District

Rural District	No. of Farms	Area Farmed ha
Rathdrum	959	43,695
Baltinglass No.1	769	31,784
Shillelagh	582	22,455
Rathdown No.2	84	3,433

Table 7-3 Number and Percentage of family farms by age of holder by Rural District

Age of holder	Rathdown No.2		Rathdrum		Shillelagh		Baltinglass No.1	
	Number	%	Number	%	Number	%	Number	%
Under 35	5	6	46	5	45	8	48	6
35 to 44	13	16	174	18	114	20	135	18
45 to 54	20	24	262	28	159	27	193	25
55 to 64	18	22	232	24	134	23	184	24
65 and over	27	33	235	25	129	22	206	27
All Ages	83	100	949	100	581	100	766	100

7.1.3 Farm Sizes

Table 7-4 presents the number of farms according to farm size over the period 1991 to 2010. As detailed, the number of farms in the County has decreased by 12.3% over the stated period. The most significant fall in farm numbers occurred between the period 1991 and 2000 (-11.7%).

Table 7-4 Number of farms classified by farm size

Farm size (Hectares)	Year		
	1991	2000	2010
Farms less than 10	527	403	395
Farms between 10 and less than 20	474	391	417
Farms between 20 and less than 30	485	365	350
Farms between 30 less than 50	584	534	536
Farms between 50 less than 100	480	519	505
Farms greater than 100	180	198	191
Total Farms	2,730	2,410	2,394

Table 7-5 shows the area farmed according to crop selection.

Table 7-5 Area farmed and area under selected crops

Crops (ha)	Year		
	1991	2000	2010
Total Cereals	11,100	10,875	9,198
Potatoes	581	184	263
Silage	14,847	19,684	19,857
Hay	8,075	6,184	5,279
Pasture	49,272	49,377	56,512
Rough Grazing	18,000	12,502	7,782
All Area Farmed	103,929	101,708	101,366

7.1.4 Livestock

Table 7-6 presents the mix of livestock within the County.

Table 7-6 Number of Selected Livestock

Livestock (Head)	1991	2000	2010
Bulls	682	1108	992
Dairy Cows	22,404	20,837	17,536
Other (Beef) Cows	19,819	24,584	24,121
Other Cattle	83,979	81,930	76,308
Total Cattle	126,884	128,459	118,957
Rams	6,815	6,897	4,234
Ewes	279,096	266,855	160,956
Other Sheep	264,159	208,015	152,788
Total Sheep	550,070	481,767	317,978
Poultry	-	-	15,933
Horses	2,134	2,097	3,697

7.1.5 Farm Income

The IFI estimates farm income in the County at €28.6m. Direct payments totals €36.8m, which comprises:

1. Single farm Payment (SFP) €28m
2. REPS/AEOS²⁴ /DAS²⁵ /SCWS²⁶ €7m
3. Forestry Premiums €1.8m

7.1.6 Economy

1. Value of Agricultural Output - €149.1m
2. Value of Aquaculture Output - €0.9m
3. Value of Forestry Output - €3.6m
4. Value of Agricultural Exports arising from the agricultural output in county - €205.3m

7.1.7 Agri-Industry Employment

Agriculture in Wicklow supports thousands of jobs in the rural economy, both directly in food & drink processing and also in the wider agri-industry, including input suppliers, agricultural contractors, jobs in auctioneering, transport and engineering and in accountancy, legal, veterinary and other advisory services.

Table 7-7 presents the range of agriculture related commercial activities that that located within the County. Crop and animal production, hunting and related service activities comprise the majority of agri-commercial activities in the County. Forestry, fishing and aquaculture commercial activities comprise less than 2% of all agri-commercial activities in the County.

Table 7-7 Agriculture Related Commercial Activity in County Wicklow



Industry	Description of Commercial Activity	Number	Total %
Agriculture	Crop and animal production, hunting and related service activities	795	88%
	Growing of vegetables and melons, roots and tubers	6	1%
	Growing of other non-perennial crops	6	1%
	Growing of other tree and bush fruits and nuts	2	<1%
	Growing of spices, aromatic, drug and pharmaceutical crops	2	<1%
	Growing of other perennial crops	1	<1%
	Plant propagation	13	1%
	Raising of horses and other equines	50	6%
	Raising of swine/pigs	5	1%
	Raising of poultry	1	<1%
	Raising of other animals	2	<1%
	Support activities for crop production	7	1%

24 Agri-Environment Options Scheme (AEOS)

25 Disadvantaged Areas Scheme

26 Suckler Cow Welfare Scheme

Industry	Description of Commercial Activity	Number	Total %
Forestry	Support services to forestry	9	1%
Fishing & Aquaculture	Fishing	2	<1%
	Marine aquaculture	4	<1%
Total		905	100%

Source: GeoDirectory

The number of food and drink processing jobs supported by agricultural output of the County is 1,054. There is an estimated 5,444 food and drink processing jobs based in the Mid-East²⁷ region.

With the abolition of the EU milk quota earlier in 2015, Teagasc has set as a target the increase in milk output over the next 5 years. It also has targeted the development of dairy cattle to beef systems which is estimated to see an output increase of 20%.

8 Key Findings

This socio economic profile of County Wicklow is a key element of the data gathering process and provides the county council with critical data on the socio-economic structure of the County. The aim of this report is to provide Wicklow County Council with an economic profile for the County based on the data from amongst other sources, Census 2011, POWSCAR, Department of Social Protection, GeoDirectory and 2011 Pobal HP Deprivation Index. The profile provides detail on the status of Wicklow in a national and regional context.



Between 2006 and 2011, the County population increased by 8.3% to 136,640, mirroring the rate of growth nationally (8.1%). While Wicklow's population growth rate exceeded that of Dublin (7%), it was lower than neighbouring counties Kildare (12.7%) and Wexford (10.3%), while Carlow experienced the same rate of population growth as Wicklow.

Census 2011 identified that an increasing percentage of the population in County Wicklow is living in urban areas and currently stands at 73%

The jobs ratio in 2011 was 42% reflecting the poor economic conditions at the time.

At a county level, Wicklow is not characterised by extremes, with regard to affluence or deprivation. Only one Electoral Division, Rathmichael in Bray is in the category of 'disadvantaged'. All remaining 81 EDs in the County are identified to be at most, marginally below the national average. However, at Small Area (SA) level, there are more significant differences in affluence levels.

Unemployment levels in the county have reduced in the county with the number on the Live Register dropping to 10,420 in March 2015. Construction and craft related workers remain the largest group of unemployed.

The County exhibits a large extent of out-commuting for work, particularly in the towns in the north east. The largest destination for out-commuting is Dún Laoghaire Rathdown, with similar numbers working in Dublin City.



Greystones – Delgany and Blessington exhibit rates of out-commuting in excess of 80%.

'Wholesale, Retail Trade, Transportation and Storage' forms the largest Industrial group for those working in Wicklow (29%), followed by 'Information and Communication, Financial, Real Estate' (24%).

Of in-commuters travelling in to the County, 29% are from Dún Laoghaire-Rathdown functional area and 26% are from County Wexford. The highest number of in-commuters from the Dún Laoghaire-Rathdown area is working in 'Wholesale, Retail Trade, Transportation and Storage' sectors and 'Education, Human Health and Social Work Activities'. 24% of all persons in-commuting into the County from County Wexford are employed in 'Education, Human Health and Social Work Activities'.

Out-commuting from Bray to the Dún Laoghaire Rathdown area is significant across a range of sectors. Out-commuting to Dublin city is dominated by employment in the 'Communication, Financial, Real Estate' sector. By contrast, in-commuting to Bray is characterised by the 'Wholesale, Retail Trade, Transportation and Storage' class.

A similar pattern is exhibited in Wicklow-Rathnew, although the proportion working in Dún Laoghaire and Dublin City is reduced.



Arklow employs a high proportion (42%) of its own residential labour force. Over half of these (804 persons) are employed in Wholesale, Retail Trade, Transportation and Storage sector.

Greystones-Delgany exhibits a high degree of out-commuting, to a wide range of locations, particularly in Dublin. The 'Information and Communication, Financial, Real Estate' sector comprises a majority of those employed in Dublin 1, 2 and 4.

The highest proportion of Blessington residents employed (30%) are working in Wholesale, Retail Trade, Transportation and Storage sector, while 19% are working within the sectors of 'Manufacturing, mining and quarrying, Electricity, Gas' (351 persons).

There are currently 19 IDA client companies located in County Wicklow across a range of sectors supporting 2,342 jobs. There are currently 171 Enterprise supported companies in the county



Twenty-six 'film, video and television production related companies', 132 'IT and Communications' businesses and 73 'Cultural, Arts, Sports and Entertainment' enterprises are located within the County.



Retail trade is improving from a difficult period. However, significant leakage is still experienced from the county's retail centres.

Wicklow received over 204,000 overseas visitors in 2013 providing revenue of €287m, dominated by British and Mainland European visitors.

The pattern of farming shows a reduction in the number of young farmers and an increase in the average size of holdings between 1991 and 2010.



The results portray a diverse and varied county, growing in population and experiencing a range of influences, pressures and opportunities. The Local Economic and Community Plan will set out a framework to meet the key priorities and objectives to deliver an attractive and sustainable county for all of County Wicklow's residents, businesses and visitors.

Appendices

Appendix 1 Live Register (Persons) by Last Occupation Held and Social Welfare Office (March 2015)²⁸

Last Occupation Held	Wicklow County	Bray	Wicklow	Arklow	Baltinglass
Construction, woodwork and metal and related industries	2,680	970	830	620	270
Craft and related	1,850	1,050	170	490	140
Other broad occupational groups	1,640	330	670	370	280
Plant and machine operatives	1,480	490	210	460	320
Retail, sales	1,340	490	250	510	90
Personal and protective services	1,310	460	300	340	210
General operatives	1,250	440	150	390	280
Sales	1,240	460	230	470	80
Clerical and secretarial	1,220	700	210	180	130
Office admin, clerical, secretarial	1,210	690	210	180	130
Blocklayer, bricklayer, builder, building contractor, dry liner, ganger, glazier, mason, painter (construction), plaster, stonemason, tiler	1,020	650	70	240	50
Builder's mate, carpenter's mate, construction other occupation, labourer (on building site), maintenance worker, road construction worker	960	60	610	180	120
Check-out operator, petrol-pump attendant, sales assistant, salesman/woman/persons, shop assistant	850	230	200	340	70
Domestic and catering	840	330	150	230	130
Packer, sorter, tester, wrapper	830	270	10	300	240
Administrative officer, civil servant, clerical assistant, clerical officer	710	510	30	110	60
Professional	590	370	80	110	40
Management	580	350	90	110	30
Managers and administrators	530	290	80	120	40
Health and related industries	530	190	140	130	70

Last Occupation Held	Wicklow County	Bray	Wicklow	Arklow	Baltinglass
Associate professional and technical	360	240	30	70	20
Barman, barperson, cellarman, chef, cook, lounge boy, waiter/ waitress	340	70	110	100	70
Factory worker/operative, labourer (not classified), operative, other occupation (not classified)	330	150	20	60	110
Education	280	190	30	50	20
Baker, boner, butcher, fish filleted, fish worker, fishmonger, food preparation trades, poultry worker	260	160	10	70	20
Au pair, child minder, childcare and related occupation, nanny, playgroup leader	250	70	100	50	40
Accommodation assistant, caretaker, domestic, hospital domestic, house assistant, housekeeper, laundry/dry cleaning	230	100	30	60	40
No occupation (including occupation unknown)	220	130	50	20	10
Agriculture, fishing and related Industries	210	60	20	80	50
Business and financial	210	160	10	20	10
Security, military	200	80	20	80	20
Teaching professional - lecturer, teacher, tutor	200	120	20	40	20
Dog handler, farm worker, fisherman, forestry worker, gamekeeper, lumberjack, stable hand, tractor driver	200	60	20	70	50
Vehicle trade	190	100	20	70	20
Auctioneer, insurance agent, sales representative	190	140	30	10	10
Demonstrator, florist, merchandiser, sales other occupation, telephone salesperson	190	70	0	110	0
Personal assistant, secretary, typist, word processor operator	170	30	120	10	10
Assembler, assembly line worker, folder, harness maker, stitcher, textile worker (unskilled)	170	60	90	20	0
Beauty	160	90	30	30	20
Barber, beautician, hairdresser	160	90	30	30	20
Bus conductor, bus driver, bus inspector, delivery van driver, lorry driver, road transport worker, taxi driver, truck driver, van driver	160	30	60	30	30
Machine operator food/drink, machine operator textile industry	140	90	30	20	0
Administrator, chief executive, company director	130	50	40	40	10

Last Occupation Held	Wicklow County	Bray	Wicklow	Arklow	Baltinglass
Bank manager, building society manager, credit controller, office manager	130	100	10	20	0
Cabinet maker, carpenter, case and box maker, joiner, woodworker	130	40	40	50	20
Manager other	120	80	10	30	10
Park ranger, security guard, traffic warden	120	60	20	30	10
Advertising executive, clergy, priest, professional other, social scientist, vicar	110	90	10	10	0
Author, designer, journalist, musician, sportsman, sportswoman	110	80	20	10	0
Bank official, banker, building society clerk, cashier, office clerk, teller, wages clerk	110	30	40	20	20
Craft and related other occupation, foreman, glass cutter, horticultural worker, potter	110	60	10	30	10
Information technology	100	80	0	10	0
Computer analyst, computer programmer, systems analyst	100	80	0	10	0
Aircraft mechanic, garage worker, mechanic, motor body repairer, motor mechanic, painter (aircraft), painter (vehicle), panel beater, tyre and exhaust fitter	100	60	10	30	10
Ambulance driver, dental nurse, hospital auxiliary, nursing auxiliary	100	40	10	30	20
Engineering operative, lubricator, machine driver, plant and machine operators, printer's assistant, process operative, production operative, sewage worker, wood turner, woodcutting machinist	100	20	20	40	30
Car park attendant, cleaner, hospital porter, hotel porter, kitchen hand, sales and service other occupation	100	30	20	50	0
Health professional - dentist, doctor, medical doctor, pharmacist (chemist), vet	90	40	20	30	0
Civil engineer, electrical engineer, mechanical engineer, software engineer	80	40	10	20	0
Electrical trade, electrician, linesman/woman, radio service engineer, TV/video service engineer	80	50	0	20	10
Accountant, actuary, management consultant, statistician	60	40	0	10	10

Source: CSO StatBank/Live Register/LRM31 (2015M03)

Appendix 2 Retail Mix by Settlement

Table A2-1 Bray Retail Types

Retail Type	Total Number	Total %
Dispensing Chemist In Specialised Stores	10	6%
Other Retail Sale Of Food In Specialised Stores	7	4%
Other Retail Sale Of New Goods In Specialised Stores	12	7%
Retail Sale In Non-Specialized Stores With Food, Beverages Or Tobacco Predominating	14	8%
Retail Sale Of Automotive Fuel In Specialised Stores	1	1%
Retail Sale Of Beverages In Specialised Stores	3	2%
Retail Sale Of Books In Specialised Stores	5	3%
Retail Sale Of Bread, Cakes, Flour Confectionery And Sugar Confectionery In Specialised Stores	4	2%
Retail Sale Of Carpets, Rugs, Wall And Floor Coverings In Specialised Stores	3	2%
Retail Sale Of Clothing In Specialised Stores	14	8%
Retail Sale Of Computers, Peripheral Units And Software In Specialised Stores	1	1%
Retail Sale Of Electrical Household Appliances In Specialised Stores	2	1%
Retail Sale Of Fish, Crustaceans And Molluscs In Specialised Stores	2	1%
Retail Sale Of Flowers, Plants, Seeds, Fertilisers, Pet Animals And Pet Food In Specialised Stores	2	1%
Retail Sale Of Food, Beverages And Tobacco In Specialised Stores	9	5%
Retail Sale Of Footwear And Leather Goods In Specialised Stores	7	4%
Retail Sale Of Fruit And Vegetables In Specialised Stores	3	2%
Retail Sale Of Furniture, Lighting Equipment And Other Household Articles In Specialised Stores	10	6%
Retail Sale Of Games And Toys In Specialised Stores	2	1%
Retail Sale Of Hardware, Paints And Glass In Specialised Stores	2	1%
Retail Sale Of Meat And Meat Products In Specialised Stores	5	3%
Retail Sale Of Medical And Orthopaedic Goods In Specialised Stores	3	2%
Retail Sale Of Music And Video Recordings In Specialised Stores	2	1%
Retail Sale Of Newspapers And Stationery In Specialised Stores	7	4%
Retail Sale Of Other Goods In Specialised Stores	16	9%
Retail Sale Of Second-Hand Goods In Stores	11	6%

Retail Type	Total Number	Total %
Retail Sale Of Sporting Equipment In Specialised Stores	3	2%
Retail Sale Of Telecommunications Equipment In Specialised Stores	6	4%
Retail Sale Of Textiles In Specialised Stores	1	1%
Retail Sale Of Watches And Jewellery In Specialised Stores	3	2%
Grand Total	170	100%

Table A2-2 Wicklow-Rathnew Retail Types

Retail Type	Total Number	Total %
Dispensing Chemist In Specialised Stores	8	8%
Other Retail Sale Of Food In Specialised Stores	4	4%
Other Retail Sale Of New Goods In Specialised Stores	7	7%
Retail Sale In Non-Specialized Stores With Food, Beverages Or Tobacco Predominating	10	10%
Retail Sale Of Automotive Fuel In Specialised Stores	2	2%
Retail Sale Of Beverages In Specialised Stores	1	1%
Retail Sale Of Books In Specialised Stores	2	2%
Retail Sale Of Bread, Cakes, Flour Confectionery And Sugar Confectionery In Specialised Stores	1	1%
Retail Sale Of Carpets, Rugs, Wall And Floor Coverings In Specialised Stores	2	2%
Retail Sale Of Clothing In Specialised Stores	7	7%
Retail Sale Of Computers, Peripheral Units And Software In Specialised Stores	2	2%
Retail Sale Of Fish, Crustaceans And Molluscs In Specialised Stores	1	1%
Retail Sale Of Flowers, Plants, Seeds, Fertilisers, Pet Animals And Pet Food In Specialised Stores	5	5%
Retail Sale Of Food, Beverages And Tobacco In Specialised Stores	2	2%
Retail Sale Of Footwear And Leather Goods In Specialised Stores	1	1%
Retail Sale Of Furniture, Lighting Equipment And Other Household Articles In Specialised Stores	4	4%
Retail Sale Of Games And Toys In Specialised Stores	2	2%
Retail Sale Of Hardware, Paints And Glass In Specialised Stores	3	3%
Retail Sale Of Information And Communication Equipment In Specialised Stores	1	1%
Retail Sale Of Meat And Meat Products In Specialised Stores	3	3%
Retail Sale Of Medical And Orthopaedic Goods In Specialised Stores	1	1%

Retail Type	Total Number	Total %
Retail Sale Of Music And Video Recordings In Specialised Stores	1	1%
Retail Sale Of Newspapers And Stationery In Specialised Stores	2	2%
Retail Sale Of Other Goods In Specialised Stores	11	11%
Retail Sale Of Second-Hand Goods In Stores	4	4%
Retail Sale Of Sporting Equipment In Specialised Stores	4	4%
Retail Sale Of Telecommunications Equipment In Specialised Stores	1	1%
Retail Sale Of Textiles In Specialised Stores	1	1%
Retail Sale Of Watches And Jewellery In Specialised Stores	4	4%
Grand Total	97	100%

Table A2-3 Arklow Retail Types

Retail Type	Total Number	Total %
Dispensing Chemist In Specialised Stores	6	5%
Other Retail Sale Of Food In Specialised Stores	6	5%
Other Retail Sale Of New Goods In Specialised Stores	8	6%
Retail Sale In Non-Specialized Stores With Food, Beverages Or Tobacco Predominating	13	10%
Retail Sale Of Audio And Video Equipment In Specialised Stores	1	1%
Retail Sale Of Automotive Fuel In Specialised Stores	7	5%
Retail Sale Of Beverages In Specialised Stores	2	2%
Retail Sale Of Books In Specialised Stores	1	1%
Retail Sale Of Carpets, Rugs, Wall And Floor Coverings In Specialised Stores	2	2%
Retail Sale Of Clothing In Specialised Stores	23	18%
Retail Sale Of Computers, Peripheral Units And Software In Specialised Stores	3	2%
Retail Sale Of Electrical Household Appliances In Specialised Stores	2	2%
Retail Sale Of Flowers, Plants, Seeds, Fertilisers, Pet Animals And Pet Food In Specialised Stores	4	3%
Retail Sale Of Food, Beverages And Tobacco In Specialised Stores	3	2%
Retail Sale Of Footwear And Leather Goods In Specialised Stores	3	2%
Retail Sale Of Fruit And Vegetables In Specialised Stores	2	2%
Retail Sale Of Furniture, Lighting Equipment And Other Household Articles In Specialised Stores	9	7%
Retail Sale Of Games And Toys In Specialised Stores	1	1%
Retail Sale Of Meat And Meat Products In Specialised Stores	5	4%
Retail Sale Of Music And Video Recordings In Specialised Stores	1	1%
Retail Sale Of Newspapers And Stationery In Specialised Stores	5	4%

Retail Type	Total Number	Total %
Retail Sale Of Other Goods In Specialised Stores	12	9%
Retail Sale Of Second-Hand Goods In Stores	4	3%
Retail Sale Of Telecommunications Equipment In Specialised Stores	3	2%
Retail Sale Of Watches And Jewellery In Specialised Stores	3	2%
Retail Sale Via Stalls And Markets	1	1%
Grand Total	130	100%

Table A2-4 Greystones-Delgany Retail Types

Retail Type	Total Number	Total %
Retail Sale In Non-Specialized Stores With Food, Beverages Or Tobacco Predominating	7	11%
Retail Sale Of Automotive Fuel In Specialised Stores	2	3%
Retail Sale Of Beverages In Specialised Stores	3	5%
Retail Sale Of Books In Specialised Stores	1	2%
Retail Sale Of Bread, Cakes, Flour Confectionery And Sugar Confectionery In Specialised Stores	1	2%
Retail Sale Of Carpets, Rugs, Wall And Floor Coverings In Specialised Stores	1	2%
Retail Sale Of Clothing In Specialised Stores	11	17%
Retail Sale Of Flowers, Plants, Seeds, Fertilisers, Pet Animals And Pet Food In Specialised Stores	4	6%
Retail Sale Of Food, Beverages And Tobacco In Specialised Stores	1	2%
Retail Sale Of Footwear And Leather Goods In Specialised Stores	2	3%
Retail Sale Of Fruit And Vegetables In Specialised Stores	1	2%
Retail Sale Of Furniture, Lighting Equipment And Other Household Articles In Specialised Stores	2	3%
Retail Sale Of Games And Toys In Specialised Stores	1	2%
Retail Sale Of Hardware, Paints And Glass In Specialised Stores	1	2%
Retail Sale Of Information And Communication Equipment In Specialised Stores	1	2%
Retail Sale Of Meat And Meat Products In Specialised Stores	3	5%
Retail Sale Of Newspapers And Stationery In Specialised Stores	5	8%
Retail Sale Of Other Goods In Specialised Stores	7	11%
Retail Sale Of Second-Hand Goods In Stores	3	5%
Retail Sale Of Sporting Equipment In Specialised Stores	3	5%
Retail Sale Of Telecommunications Equipment In Specialised Stores	2	3%
Retail Sale Of Textiles In Specialised Stores	1	2%
Retail Sale Of Watches And Jewellery In Specialised Stores	2	3%
Grand Total	65	100%

Table A2-5 Blessington Retail Types

Retail Type	Total Number	Total %
Retail Sale In Non-Specialized Stores With Food, Beverages Or Tobacco Predominating	4	13%
Retail Sale Of Automotive Fuel In Specialised Stores	2	7%
Retail Sale Of Beverages In Specialised Stores	1	3%
Retail Sale Of Books In Specialised Stores	1	3%
Retail Sale Of Clothing In Specialised Stores	1	3%
Retail Sale Of Electrical Household Appliances In Specialised Stores	1	3%
Retail Sale Of Flowers, Plants, Seeds, Fertilisers, Pet Animals And Pet Food In Specialised Stores	4	13%
Retail Sale Of Food, Beverages And Tobacco In Specialised Stores	2	7%
Retail Sale Of Footwear And Leather Goods In Specialised Stores	1	3%
Retail Sale Of Hardware, Paints And Glass In Specialised Stores	1	3%
Retail Sale Of Meat And Meat Products In Specialised Stores	1	3%
Retail Sale Of Other Goods In Specialised Stores	8	27%
Retail Sale Of Second-Hand Goods In Stores	1	3%
Retail Sale Of Sporting Equipment In Specialised Stores	2	7%
Grand Total	30	100%

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