



Leading Economic Development in **Dublin City**

Dublin City Council – Economic Development Office
Economic Development Strategy
2022-2024



Comhairle Cathrach
Bhaile Átha Cliath
Dublin City Council

Leading Economic Development in Dublin City

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1 Foreword

To be inserted

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2 Executive Summary

Dublin is a leading European capital city and national economic driver. Featuring a young, diverse and highly educated workforce and population, a renowned innovation and entrepreneurship ecosystem and a fusion of culture alongside an innovative economy, it is a truly unique place to live, learn, invest and start or develop an enterprise.

As Dublin City and its economy rebounds from the impact of the Covid-19 pandemic, it is also facing into various macroeconomic and microeconomic challenges. Working, commuting and retail patterns have changed drastically. Sustainability, digitalisation and the transition to a low carbon, circular economy have become key priorities and challenges.

This document has been produced within the aforementioned context and is set out to proactively respond to the various challenges and opportunities facing Dublin. In recognition of the dynamic nature of the city economy, it is a living document and can be adapted as needed. The adaptive nature of this strategy means that the Economic Development Office (EDO) can identify and address challenges, respond to opportunities and ultimately better support Dublin City Council (DCC) to remain agile and resilient regarding economic development and better deliver relevant interventions.

The updated Economic Development Strategy of the EDO in DCC is presented in this document. It was produced as part of implementing the DCC Corporate Plan 2020-2024 regarding: Strategic Goal 3, Priority Objective 2. This document is divided into 2 parts:

1. **Looking Back** reviews the predecessor document, Dublin City: Promoting Economic Development 2018 – 2021 and highlights key actions, outputs and impact of the EDO so far.
2. **Looking Forward** considers the future focus and details the updated economic development strategy to guide the EDO during 2022 - 2024. It features an updated vision, mission, pillars and objectives. In recognition of the commitment of DCC/EDO to supporting Dublin City and its economy to become more sustainable, the pillars are also mapped against the UN SDG's.

The strategy will be overseen by the DCC Economic Development and Enterprise SPC and will be implemented by the EDO via Annual Action Plans. These plans will detail specific actions and will be presented annually during the lifetime of the strategy. The document is summarised below:

Looking Back: Actions and Impact of the EDO so far...

Infographics to be inserted

Looking Forward: A New Strategy for the EDO...

Vision



Dublin City: An Innovative, Sustainable & Inclusive Economy...

An innovative, sustainable and inclusive Dublin City economy that is dynamic, attractive and collaborative, that is unique, diverse and proactive to current and future challenges and opportunities

Mission



Leading Economic Development in Dublin City...

To lead the promotion of economic, enterprise, and innovation and entrepreneurship ecosystem development to support Dublin City's economy through managing, leading and collaborating in policy, projects, research, & events

Pillars of Economic Development

Pillar 1	Human Development
Objectives 	1.1. Support all to engage in the Dublin City economy and seek to identify and address barriers to participation 1.2. Encourage the creation of quality and inclusive employment opportunities and skills development
Pillar 2	Placemaking & Clusters
Objectives 	2.1. Support the creation and development of placemaking initiatives that enhance Dublin City, its economy and ecosystem as a place to live, work, learn and start or develop an enterprise in 2.2. Identify and enable cluster development in key economic and enterprise sectors
Pillar 3	Promotion & Investment
Objectives 	3.1. Promote and brand Dublin as an attractive, unique, proactive place and economy to work, cluster, invest, and to start or develop an enterprise in 3.2. Highlight and support international and local investment opportunities through stakeholder collaboration and dissemination of key economic information
Pillar 4	Innovation & Transformation
Objectives 	4.1. Enhance the ecosystem and city economy through developing supports, encouraging collaboration, promoting Dublin as a testbed and supporting new approaches and transitions such as the social economy, digitalisation and the transition to a low carbon, circular economy 4.2. Monitor the ecosystem, economy and the macroeconomic environment in order to identify and seek to address and support current and future challenges and opportunities

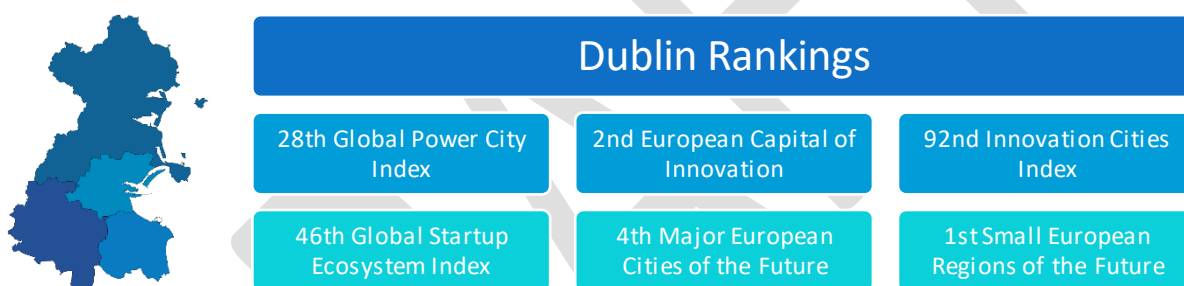
Pillars & Objectives – UN SDGs Alignment

UN SDGs Alignment	4 QUALITY EDUCATION	8 DECENT WORK AND ECONOMIC GROWTH	9 INDUSTRY, INNOVATION AND INFRASTRUCTURE	10 REDUCED INEQUALITIES	11 SUSTAINABLE CITIES AND COMMUNITIES	12 RESPONSIBLE CONSUMPTION AND PRODUCTION

Implementation: The strategy will be implemented by the EDO via Annual Action Plans

3 Introduction

Dublin City is an ancient, unique and modern day European capital city. For centuries, Dublin has played a leading role in Ireland as a centre for trade, culture and economic development which continues today. The city is home to 554,554 residents while almost 1.4 million residents live in the wider county¹. Furthermore, each day, the population of the city and county increases significantly as thousands of people commute to work² from the greater Dublin area or further afield³. In this regard, 762,800 people representing over 30% of the national workforce, are employed within Dublin City and County⁴. Featuring a young, diverse and highly educated workforce, Dublin is the location of many of the world's leading technology companies including Google, Meta, Twitter, Microsoft, HP and Dell⁵, as well as the most popular location for company start-ups in Ireland⁶.



On account of various unique attributes and the city's dynamism, Dublin ranks competitively alongside other European and global cities. As part of the Global Power City Index 2021⁷, which considers economy, accessibility, environment, livability, cultural interaction and R&D, Dublin ranked 28th. In recognition of the cities support for and promotion of innovation, Dublin achieved joint second place in the European Capital of Innovation (iCapital) 2021 awards⁸ and 92nd of 500 in the Innovation Cities Index⁹. As a result of the proactive and positive environment that supports the creation and development of startups across the city, Dublin's startup ecosystem ranked 46th of 1,000 cities in the Global Startup Ecosystem Index 2022¹⁰. In the FDI European Cities and Regions of the Future 2022/23 report¹¹, regarding Major European Cities, Dublin ranked: 4th Overall, 3rd Business Friendliness, and 3rd Economic Potential. Furthermore, regarding Small European Regions, Dublin ranked: 1st Overall, 1st Business Friendliness, 1st Economic Potential, and 4th Human Capital and Lifestyle.

¹ [Central Statistics Office \(2017\) Census 2016 Small Area Population Statistics](#)

² [Central Statistics Office \(2017\) Census of Population 2016, Profile 11 Employment, Occupations and Industry](#)

³ [DRA & MERA Regional Planning Guidelines for the Greater Dublin Area 2010-2022](#)

⁴ [CSO \(2022\) Labour Force Survey Quarter 1 2022](#)

⁵ [IDA Ireland \(2022\) Dublin A Technology Hub](#)

⁶ [CRIF Vision Net \(2022\) Business in Ireland Barometer 2022 – Annual Review](#)

⁷ [Institute for Urban Strategies \(2021\) Global Power City Index 2021](#)

⁸ [European Innovation Council \(2021\) European Capital of Innovation Awards 2021](#)

⁹ [Innovation Cities Index 2021: Top 100 World's Most Innovative Cities](#)

¹⁰ [StartupBlink \(2022\) Global Startup Ecosystem Index \(Best Cities for Startups\)](#)

¹¹ [FDI Intelligence \(2022\) European Cities and Regions of the Future 2022/23](#)



Managing, servicing and leading the city...

Managing, servicing and leading the city is Dublin City Council (DCC), the largest Local Authority in Ireland and democratically elected body that governs Dublin City. In collaboration with the elected members and various stakeholders, the DCC team of 5,900 staff deliver over 520 services to citizens, businesses and visitors. The vision of DCC is that Dublin is...

A dynamic, sustainable city, that is future-ready, built on thriving, inclusive neighbourhoods and communities, a strong economy, a vibrant cultural life, and compact, connected growth

To guide Dublin City Council towards achieving this vision and in its provision of extensive services, it utilizes a Corporate Plan¹². The current Corporate Plan provides a strategic framework for action during 2020-2024 and features principles, goals, priority objectives and associated supporting strategies or actions. Goal 3 of the six goals relates to 'A strong, diverse economy' and the support of enterprise and economic development, economic growth and city competitiveness. A priority objective under this goal is to plan and provide for the future economic growth of the city by understanding and responding to new economic trends and an associated supporting strategy or action is to review the

¹² [Dublin City Council \(2020\) Dublin City Council Corporate Plan 2020-2024](#)

previous Economic Development Strategy for the Economic Development Office (EDO) of DCC. This document was thus produced as part of implementing the DCC Corporate Plan 2020-2024 regarding: Strategic Goal 3, Priority Objective 2 and to complete the supporting strategy / action.

Dublin City Council - Corporate Plan 2020-2024
Strategic Goal 3: To continue to grow a strong, diverse economy
Priority Objective: Plan and provide for the future economic growth of the city by understanding and responding to new economic trends
Supporting Strategy: Review Dublin City: Promoting Economic Development 2018 – 2021

This document reviews the previous strategy: Dublin City: Promoting Economic Development 2018-2021¹³ and presents the updated Economic Development Strategy of the EDO in DCC. The new strategy serves to guide the EDO in its implementation of a range of strategic activities to support tangible economic development across the city and the enhancement of the city economy.

A Living Document...

On account of the dynamic nature of economic development, the entrepreneurship and innovation ecosystem, the policy and indeed macro-economic changes, this strategy is presented as a living document which can be adapted in response. The adaptive nature of this strategy means that the EDO can identify and address challenges, respond to opportunities and ultimately better support DCC to remain agile and resilient regarding economic development and better deliver relevant interventions.

The document is divided into 2 core parts which are:

- 1. Looking Back** This part reviews the predecessor document and previous strategy, Dublin City: Promoting Economic Development 2018 – 2021 and highlights key actions, impact and outputs of the EDO so far.
- 2. Looking Forward** This part considers the future focus and presents the updated economic development strategy of the EDO. The predecessor document was utilised as a foundation to create the strategy. This part also features an overview of the EDO, a socio-economic review of Dublin and the inclusion of a description of economic development pertaining to the Local Government Reform Act 2014, which were used to inform the new strategy.


¹³ [Dublin City Council \(2018\) Dublin City Promoting Economic Development 2018-2021](#)

4 Looking Back

In 2018, the EDO produced: Dublin City Promoting Economic Development 2018-2021, a document and strategy to guide the office and the implementation of various activities. (An overview of it is provided in appendix 6.2). In order to implement the strategy, annual action plans were produced which set out numerous actions and activities. Key actions and associated impacts delivered under the strategy and action plans are highlighted below. These are categorised in regard to the 4 complementary and interlinked work streams of the EDO.

EDO Work Streams			
			
Policy	Projects	Research	Events

4.1 Actions & Impact



Policy

Policy concerns activities that the EDO is obligated, invited or interested regarding local, regional, national or international policy formulation, implementation and analysis

Contribution to Policy Formulation and Implementation of...

- | | | |
|---|---|---|
| <ul style="list-style-type: none">National Social Enterprise Policy for Ireland 2019-2022Eastern Midlands Regional Assembly: Regional Spatial Economic Strategy 2019-2031Dublin Regional Action Plan for Jobs 2016-2018Dublin Regional Enterprise Plan to 2020 | <ul style="list-style-type: none">Dublin City Development Plan 2016-2022Dublin City Corporate Plan 2020-2024Dublin City Local Economic and Community Plan 2016-2021Dublin City LECP Annual Actions Plans | <ul style="list-style-type: none">Dublin Climate Change Action Plan 2019-2024Dublin City's Culture & Creative Strategy 2018-2022LEO Development Plan 2021-2024DCC Tourism Statement of Strategy & Work Programme 2017-2022 |
|---|---|---|



Dublin City Summit Series

Created and managed the high level policy forum to consider the key challenges and opportunities facing the city



Supported various policy related working groups...

Summits hosted so far...

- Reset Summit 2020
- Social Enterprise Summit 2019
- Apprenticeship Summit 2018
- Infrastructure Summit 2017
- Brexit Summit 2016



Outcomes Reports produced for each summit

- Recovery Task Force
- National Social Enterprise Policy Implementation Working Group
- Night Time Economy – Working Group
- International Relations & EU Affairs – Working Group
- D8 Social Enterprise Consortium



YOUR DUBLIN VOICE

DUBLIN'S OPINION PANEL

Opinion panel used to engage citizens and others to inform policy makers and change in Dublin City and County



Dublin City Social Enterprise Committee

Supported the creation and manage the committee which oversees the DC Social Enterprise Awards and various activities to help social enterprises start and grow in Dublin City



ED&E SPC 2014-2019

Supported the first Economic Development and Enterprise Strategic Policy Committee in Dublin City Council (2014-2019)

Projects

Projects are broad initiatives by which the EDO seeks to innovate and tangibly support development, implement policy interventions, and pilot new ideas or supports

EDO Participation in International / European / National / Regional Projects



- Better Entrepreneurship Policy Tool (2018) Pilot Testing & Workshop
- Respond Rebuild Reinvent (2020) Peer learning project on social and solidarity economy ecosystem development



- World Cities Culture Forum (Ongoing) Network member and contributor to research reports and compilations of Dublin City cultural indicators and case studies. This data is used to provide insights and highlight cultural trends



- Metroverse (2020) Pilot user and contributor to the development of the unique analytical tool which aims to deliver new insights on the composition, capabilities and growth opportunities for cities across the world



- Dublin-Belfast Economic Corridor (Ongoing) Member and supporter of the collaborative project between local authorities and universities to drive regional growth, development, job creation and prosperity for 2m+ people



- European Social Economy Regions (2018-2021) Led Dublin's involvement in annual projects & ongoing network member
- TAIEX-EIR Peer 2 Peer (2019) Peer learning workshop on circular economy development in cities



- EIT Climate-KIC (Ongoing) Partner in the initiative to accelerate the transition to a zero-carbon, climate resilient society and City Partner in the ClimAccelerator to support climate impact and circular economy start-ups



- Council of Europe Diversity Connectors: the Art of Mixing project (2017) as part of Intercultural Cities Programme. Pilot project participant and contributor to outcomes report



- fDi Intelligence European Cities of the Future Research Projects (Ongoing) Provide research and analysis assistance to support Dublin's ranking in the various categories

Local Projects



Almost **€400,000** distributed



...among **44** Social Enterprise Projects

EDO supports the promotion and development of the awards programme

859 Students ...developed **44** Social Innovation Projects



Supported by EDO to deliver youth led social innovation programmes in Dublin City

25 secondary schools ...in **5** DEIS secondary schools including

SMART TOURISM INITIATIVE

Supporting the development of...

- Digital Trails
- Data Analysis to understand visitor behaviour through the "Tourism Recovery Spotlight Report"
- Collaboration and Engagement

Dublin was shortlisted for the European Capital of Smart Tourism 2021



SOCIAL ENTERPRISE TOOLKIT

Developed by Irish Social Enterprise Network and supported by DCC, Community Finance Ireland and Dublin South City Partnership



Pilot Projects



Over **100** participants have completed the programme since 2018. EPA grant funding received in 2021 to develop it as a Local Authority Prevention Network - Waste Prevention Project by DCC and Dun Laoghaire Rathdown County Council

MODOS circular economy training programme for SME's, led by the EDO and the Eastern Midlands Regional Waste Management Planning Office supports enterprises to become more sustainable, reduce waste and unlock opportunities



ENFUSE matches local enterprises / social enterprises with teams of MSc. level university / college students

122 Enterprises have participated & received a bespoke plan

Estimated value of all the plans is... **€610,000**

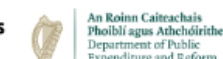
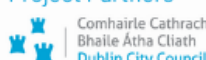
566 Students have benefited from an enriched learning experience and an opportunity to apply their skills to support a local enterprise



- European Enterprise Promotion Awards - National Winner 2022
- Excellence in Local Government Awards 2022 - Shortlisted
- Public Service Innovation Fund 2020



Project Partners



Pilot project (2018 - 2019) designed to support those living with dementia and their carers by making it easier for them to shop / do business in their local communities. Supported by:



Research conducted by EDO

- Public Economic Development in Dublin and Beijing - Comparative Report 2019
- Enterprise & Co-Working Space Providers in Dublin - Research Report 2019
- Makerspace Provision in Dublin - Research Report 2021
- City Branding and Placemaking Research Report 2021
- Enterprise Hubs in Dublin - Research Report 2022
- Getting the Messages - Pilot Project Report
- Dublin City Social Enterprise Awards Brochure 2021
- Dublin City Social Enterprise Awards 2015-2021 Brochure
- Dublin City Social Enterprise Awards Impact Report 2019
- DCC-EDO/LEO Event Support Process (Internal Document)
- Onboarding Plan (Internal Document)
- Dublin City Summit Series - Outcomes Reports
- Reset Summit 2020
- Social Enterprise Summit 2019
- Apprenticeship Summit 2018
- Infrastructure Summit 2017
- Brexit Summit 2016

DUBLIN ECONOMIC MONITOR

The Dublin Economic Monitor is a joint initiative on behalf of the four Dublin local authorities to track developments and trends in the capital's economy. It provides regular insightful data and analysis online and in print.

29 issues to June 2022
19 Mastercard Spending Pulse publications
84 insight articles
2 Special Editions • Futurescope • Startup Week
2,000+ Monthly users on www.dublineconomy.ie



Opinion panel elicits feedback from citizens and others on challenges and opportunities facing Dublin

16 surveys conducted
15,5000 responses received
4,600 current panellists

YDYV



YDYV surveys have been conducted on topics including...

- Irish Language Usage & Attitudes
- Economic and Community Development
- Dublin City Development Plan
- Irish Language Proficiency
- Archaeology, Building Conservation & Heritage
- Dublin Branding
- Community & Involvement
- Night Time Economy
- DCC Corporate Plan
- Transport & Traffic
- Build Back Better
- Micromobility
- Arts & Culture
- City Planning
- Social Media
- Biodiversity
- Covid-19
- Retail



And used to inform...

- DCC Economic Development and Enterprise SPC
- Dublin City Arts Office and Strategy
- Retail Excellence Ireland
- Dublin Economic Monitor
- DCC Senior Management
- Dublin City Local Economic & Community Plan
- LECP Advisory Committee
- DCC Communications Unit
- DCC Social Media & Website Strategies
- DCC Planning Department
- DCC Transportation Department
- DCC Corporate Plan
- Dublin City Biodiversity Action Plan
- Dublin City Development Plan
- Dublin Place Brand Office
- Dublin City Heritage Plan
- Economic Development Strategy
- DCC Irish Office Language Strategy
- Ecosystem Stakeholders

Capital Project Research Support:



- GEC Expansion. Research support provided for the €10 Million 100,000 sq. ft. expansion which provides an additional 3,000 direct/indirect jobs & space to support 150 companies in Dublin
- ICE Social Enterprise Hub. Research provided to support the hub location and development
- SPADE Kitchen Incubator. Research provided to support the expansion project

Events

Events include those led or supported by the EDO which integrate with the pillars and work streams and contribute to the promotion of economic development in the city

Supported events include...

2018 / 2019

2020

2021 / 2022

Multi-Year



Hosted events include...



5 Looking Forward

This part considers the future focus and details the updated economic development strategy to guide the EDO during 2022 - 2024. It includes an updated vision, mission and description of the four pillars of economic development, as used in the previous strategy. The pillars are presented along with strategic objectives that guide the actions and activities of the EDO. These actions are featured in an annual action plan, a separate document, presented each year during the lifetime of the strategy.

In alignment with the DCC Corporate Plan, the pillars have been mapped in regard to their contribution to achieving the United Nations Sustainable Development Goals (UN SDGs)¹⁴. Under each pillar, the most relevant UN SDGs are thus referenced. The predecessor document, Dublin City: Promoting Economic Development 2018–2021 was utilised and reviews of economic development, policy, socio-economic contexts and the previous strategy were conducted to inform the strategy. (The reviews are featured in the Appendices, Section: 6).

5.1 Economic Development Strategy: 2022-2024

Vision



Dublin City: An Innovative, Sustainable and Inclusive Economy...

An innovative, sustainable and inclusive Dublin city economy that is dynamic, attractive and collaborative, that is unique, diverse and proactive to current and future challenges and opportunities

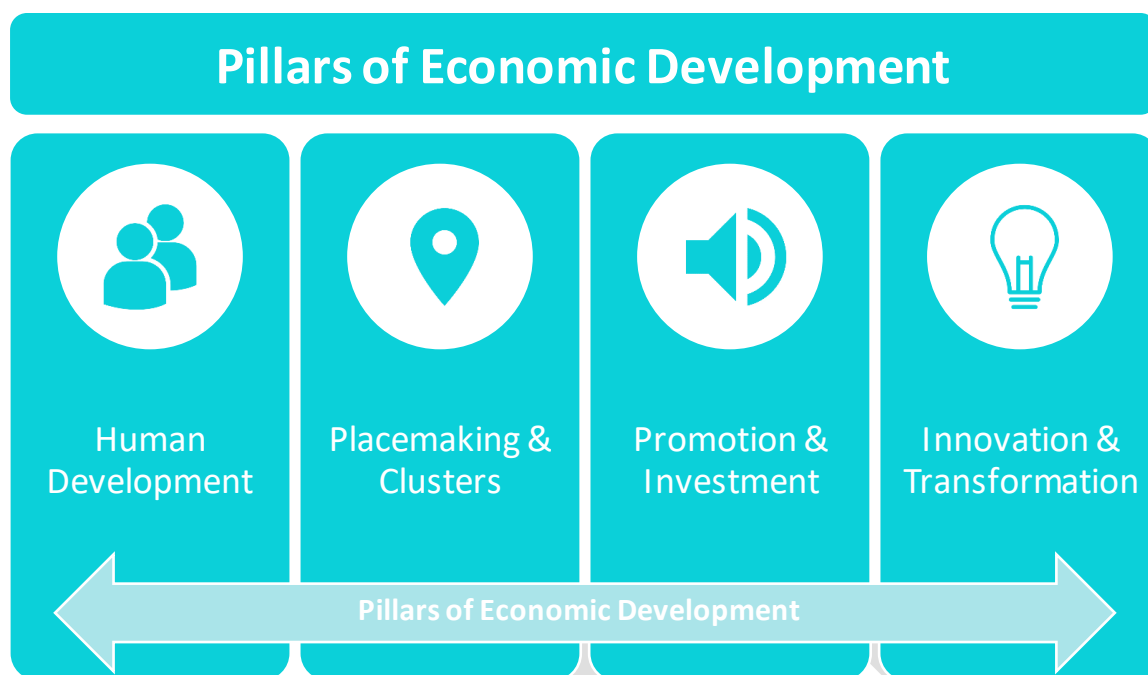
Mission



Leading Economic Development in Dublin City...



To lead the promotion of economic, enterprise, and innovation and entrepreneurship ecosystem development to support Dublin City's economy through managing, leading and collaborating in policy, projects, research, & events

¹⁴ [United Nations \(2022\) Sustainable Development Goals](#)



Following on from the vision and mission, the pillars of economic development are used as principles to guide the implementation of the strategy. The four pillars and their associated objectives are:

Pillar 1	Human Development
	Human Development relates to enlarging people's choice and opportunities to actively and freely participate in the economy and contribute to society
Objectives	1.1. Support all to engage in the Dublin City economy and seek to identify and address barriers to participation 1.2. Encourage the creation of quality and inclusive employment opportunities and skills development
UN SDG Alignment	  
Pillar 2	Placemaking & Clusters
	Placemaking concerns the creation and development of quality, sustainable places and spaces in which people want to live, work, learn and start or develop an enterprise in. Related to placemaking are clusters, which are synergistic concentrations of interconnected stakeholders that gather in places which feature relevant qualities and inputs

Objectives	<p>2.1. Support the creation and development of placemaking initiatives that enhance Dublin City, its economy and ecosystem as a place to live, work, learn and start/develop an enterprise in</p> <p>2.2. Identify and enable cluster development in key economic and enterprise sectors</p>
UN SDG Alignment	 

Pillar 3	Promotion & Investment
	Promotion and Investment relates to highlighting the attractiveness of Dublin and the encouragement of investing in Dublin through FDI and local investments
Objectives	<p>3.1. Promote and brand Dublin as an attractive, unique, proactive place and economy to work, cluster, invest, and to start or develop an enterprise in</p> <p>3.2. Highlight and support international and local investment opportunities through stakeholder collaboration and dissemination of key economic information</p>
UN SDG Alignment	

Pillar 4	Innovation & Transformation
	Innovation and transformation refers to encouraging dynamism, enabling change and proactively enhancing the city economy and ecosystem
Objectives	<p>4.1. Enhance the ecosystem and city economy through developing supports, encouraging collaboration, promoting Dublin as a testbed and supporting new approaches and transitions such as the social economy, digitalisation and the transition to a low carbon, circular economy</p> <p>4.2. Monitor the ecosystem, economy and the macroeconomic environment in order to identify and seek to address and support current and future challenges and opportunities</p>
UN SDG Alignment	   

Implementation

The strategy and objectives will be implemented via annual action plans. These separate documents will detail specific actions and will be presented annually during the lifetime of the strategy.

5.2 Economic Development Office

The Economic Development Office of Dublin City Council is responsible for implementing this strategy and will do so via annual action plans. These separate documents will feature various actions that are linked to the objectives, pillars, mission and vision of the strategy. The annual action plans will be presented annually during the lifetime of the strategy. A brief overview of the EDO is provided below which describes its remit, function and context.

The EDO was established in 2014 and is the successor to the previous DCC Economic Development Unit. It is based in the DCC Palace Street building and is broadly responsible for the promotion of economic development in the Dublin City Council administrative area. In order to strategically promote economic development in the city and ensure there is a proactive environment, it seeks to identify the economic and ecosystem requirements for the city while also managing, leading and collaborating upon a wide and dynamic range of activities, processes and initiatives.

The remit of the EDO derives from the Local Government Reform (LGR) Act 2014¹⁵ which, as noted above, prescribed an enhanced role of Local Authorities regarding local economic and enterprise development. A summary of what economic development entails, as described in the act is provided in the table below.

Summary of Economic Development
Creating and sustaining jobs
Promoting enterprise and economic development; foreign direct investment; indigenous industry; micro, small & medium enterprises; tourism; agriculture, forestry, marine, natural resource sectors
Identifying local attributes, essential to enhancing economic performance and activities
Enhancing innovation capacity, research and development investment, technology transfer, upskilling and reskilling
Helping existing and prospective businesses engage with local government regarding setting up and managing their businesses
Identifying strengths, opportunities, weaknesses and deficiencies relevant to economic performance and how to enhance or address them
Identifying economic potential and how to progress it

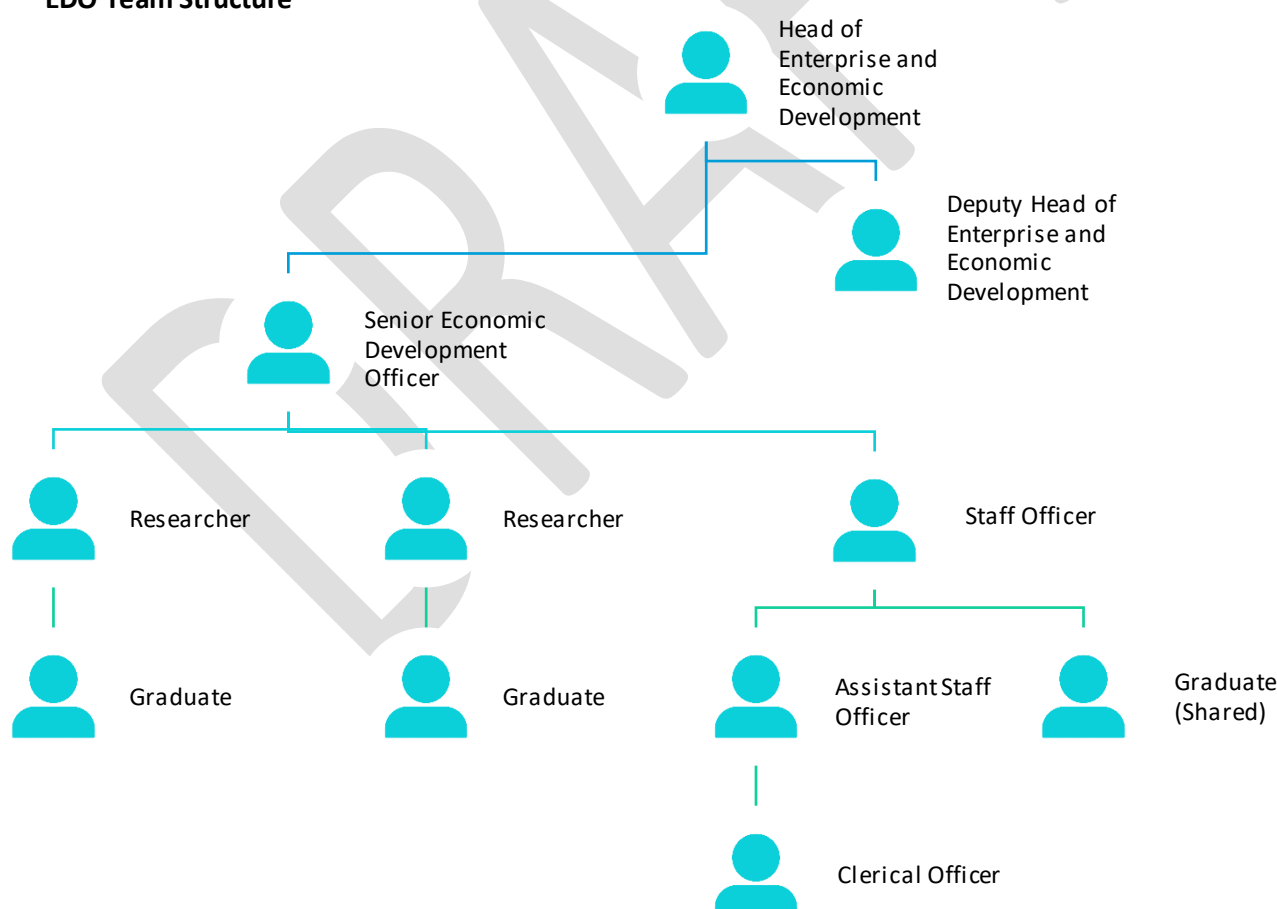
¹⁵ [Irish Statute Book \(2014\) Local Government Reform Act](#)

EDO Work Streams			
Policy	Projects	Research	Events

The work of the office is broadly divided into four complementary streams. Although distinct, activities under each are typically interlinked and contribute to progress under the other streams.

- **Policy** concerns activities that the EDO is obligated, invited or interested regarding local, regional, national or international policy formulation, implementation and analysis.
- **Projects** are broad initiatives by which the EDO seeks to innovate and tangibly support development, implement policy interventions, and / or pilot new ideas / supports.
- **Research** includes investigative, analytical and evidence basis activities which are conducted to support the other work streams, the EDO, SPC and DCC regarding economic development.
- **Events** include those led or supported by the EDO which integrate with the aforementioned streams and contribute to the promotion of economic and enterprise development in the city.

EDO Team Structure



The EDO is the sister office and closely aligned to the operations and activities of the Local Enterprise Office (LEO) Dublin City¹⁶. LEO Dublin City is a first stop shop for entrepreneurs and micro and small businesses. The office provides supports and services to help start, grow and develop businesses in the Dublin City area. The creation of LEO Dublin City in 2014 as part of the new network of 31 LEOs throughout the country was set out in the Action Plan for Jobs 2014¹⁷ and aligns with the increased role of Local Authorities regarding economic and enterprise development. Both the EDO and LEO are part of the DCC Department: Culture, Recreation and Economic Services, and report to the Assistant Chief Executive and the Economic Development and Enterprise Strategic Policy Committee (SPC).

The EDO is responsible for the management, administration and operation of the Economic Development & Enterprise SPC (SPC) for Dublin City Council. According to the Local Government Reform Act 2014 (p.64), the remit of the committee: ‘shall be to consider matters which relate to the functions of the local authority in relation to economic development and matters connected to the promotion of, including support for, enterprise, and to advise the authority on those matters.’

In short, the purpose of the SPC is to formulate, monitor and review policies which relate to the economic development and enterprise functions of DCC and to advise the Council accordingly. SPC meetings are held in the Council Chamber / Online and take place at least four times annually. They are broadcast live¹⁸ with agendas and reports circulated to members in advance, and then published on the Dublin City Council website¹⁹. The SPC consists of fifteen members, ten of whom are nominated from the elected representatives of the Council and a further five who are nominated from industry and community stakeholders. The current members of the SPC²⁰ are listed in the table below:

DCC Economic Development & Enterprise SPC - Members	
Cllr. Tom Brabazon – Chairperson	Cllr Terence Flanagan
Cllr. Racheal Batten	Cllr. Danny Byrne
Cllr. Nial Ring	Cllr. Micheál MacDonncha
Cllr. Mary Freehill	Cllr. Donna Cooney
Cllr. Tara Deacy	Cllr. Cat O’Driscoll
Evanne Kilmurray, Inner City Enterprise	Aidan Sweeney, Ibec
Odran Reid, Northside Homecare Service	Natalie McGuinness, Mason Hayes & Curran – Dublin Chamber of Commerce
Vacancy	

¹⁶ [LEO Dublin City \(2022\)](#)

¹⁷ [Government of Ireland \(2014\) Action Plan for Jobs 2014](#)

¹⁸ [Dublin City Council \(2022\) Public I TV](#)

¹⁹ [Dublin City Council \(2022\) Home Page](#)

²⁰ [Dublin City Council \(2022\) Economic Development & Enterprise SPC](#)



6 Appendices

6.1 Economic Development

As part of a major policy rethink in the early 2010s, Local Authorities were identified as having the potential to have a much greater role in local enterprise and economic development. The Local Government Reform (LGR) Act 2014²¹ provided a legislative basis for this enhanced role along with a description of what local economic development entails in the context of Local Authorities.

As stated in the act, promotion of economic development includes (but is not limited to):

- 2a creating and sustaining jobs
- 2b promoting the interests of the community: enterprise and economic development across economic sectors, foreign direct investment, indigenous industry, micro-enterprises and SMEs, tourism, and agriculture, forestry and the marine sectors, and other natural resource sectors.
- 2c identifying local attributes that are essential
 - (i) to enhancing local economic performance, such as the quality of the environment and the qualities of cities, towns and rural areas, including (I) accessibility, physical character, and infrastructure, (II) employment opportunities and quality of life, and the means by which these may be utilised to enhance competitiveness, and be supported by investment decisions relating to economic infrastructure (including transportation, water services, energy, communications and waste management), together with social and cultural facilities, and
 - (ii) to promoting local economic activities,
- 2d supporting enhancement of local innovation capacity, including investment in research and development capacity, technology transfer, up-skilling and re-skilling
- 2e identifying, for existing and prospective businesses, opportunities to engage with local government on relevant matters in setting up and managing their businesses and to ensure speedy and coordinated access and response
- 2f identifying local strengths and opportunities, weaknesses and deficiencies relevant to economic performance and
 - (i) in relation to such strengths and opportunities having regard to economic and employment trends, the means of maintaining and augmenting them, and
 - (ii) in relation to such weaknesses and deficiencies, the means of addressing or rectifying them, and
- 2g identifying economic potential and the requirements to realise it

²¹ [Irish Statute Book \(2014\) Local Government Reform Act](#)

6.2 Dublin City Promoting Economic Development 2018-2021 - Context

In 2018, the EDO produced: Dublin City Promoting Economic Development 2018-2021, a document and strategy to guide the office and the implementation of various activities. An associated vision, mission, pillars of economic development, objectives and project areas were included, upon which the activities and actions of the office were based. The four pillars were identified following consultations and the completion of a SWOT analysis. The vision, mission and pillars are detailed below:

Vision:

To support a City of opportunity that encourages an inclusive sustainable growing economy for all

Mission

- To support initiatives that will improve the quality of people's lives
- To enhance the ability of the City to attract and retain world class talent through Placemaking
- To promote Dublin as an attractive place to live, work, visit and invest
- To foster a culture of creativity and innovation in a globally connected City
- To engage with economic stakeholders to maximise the alignment and impact of resources

Pillars of Economic Development



1. Human Development is the process of enlarging people's choice and opportunities to actively participate in society and the economy
2. Placemaking is a multi-faceted approach to the planning, design and management of public spaces. Clusters are synergistic concentrations of interconnected stakeholders.
3. Promotion and investment concerns the communication of Dublin regarding FDI and local investment and the encouragement of stakeholders to invest in Dublin
4. Innovation and transformation refers to projects, initiatives and activities that address ecosystem or development challenges and provide relevant solutions

In order to implement the strategy, annual action plans were produced which featured and oversaw the delivery of numerous actions and activities.

6.3 Policy Context

Policies used to inform the Economic Development Strategy 2022-2024

United Nations Sustainable Development Goals (SDGs) ²²
Putting People First – Action Programme for Effective Local Government ²³
Local Government Reform Act 2014 ²⁴
Project Ireland 2040 ²⁵
National Policy Statement on Entrepreneurship in Ireland 2014 ²⁶
Enterprise 2025 ²⁷
Enterprise 2025 Renewed ²⁸
National Social Enterprise Policy ²⁹
Whole of Government Circular Economy Strategy 2022-2023 ³⁰
National Skills Strategy ³¹
Future Jobs Ireland 2019 ³²
Regional Spatial and Economic Strategy ³³
Dublin Regional Enterprise Plan to 2024 ³⁴
[Draft] Dublin City Development Plan 2022-2028 ³⁵
Dublin City Local Economic and Community Plan 2016-2021 ³⁶
Dublin City Corporate Plan 2020-2024 ³⁷
Dublin City Council Climate Change Action Plan 2019-2024 ³⁸
Dublin City Council Tourism Statement of Strategy and Work Programme 2017-2022 ³⁹
Local Enterprise Office Dublin City – Development Plan 2021-2024 ⁴⁰
Dublin City: Promoting Economic Development 2018-2021 ⁴¹
Reset Summit Outcomes Report ⁴²
YDYV Survey Report - Economic Development Plan 2022-2026 ⁴³

²² [United Nations \(2021\) Sustainable Development Goals](#)

²³ [Department of Environment, Community and Local Government \(2012\) Putting People First – Action Programme for Effective Local Government](#)

²⁴ [Irish Statute Book \(2014\) Local Government Reform Act](#)

²⁵ [Government of Ireland \(2018\) Project Ireland 2040 Building Ireland's Future](#)

²⁶ [Dept. Jobs, Enterprise & Innovation \(2014\) National Policy Statement on Entrepreneurship in Ireland 2014](#)

²⁷ [Dept. Jobs, Enterprise & Innovation \(2015\) Enterprise 2025 – Ireland's National Enterprise Policy 2015-2025](#)

²⁸ [Government of Ireland \(2018\) Enterprise 2025 Renewed](#)

²⁹ [Government of Ireland \(2019\) National Social Enterprise Policy for Ireland 2019-2022](#)

³⁰ [Government of Ireland \(2022\) Whole of Government Circular Economy Strategy 2022-2023](#)

³¹ [Department of Education and Skills \(2016\) Ireland's National Skills Strategy 2025 – Ireland's Future](#)

³² [Government of Ireland \(2019\) Future Jobs Ireland 2019 – Preparing Now for Tomorrow's Economy](#)

³³ [Eastern & Midland Regional Assembly \(2019\) Regional Spatial & Economic Strategy 2019-2031](#)

³⁴ [Government of Ireland \(2022\) Dublin Regional Enterprise Plan to 2024](#)

³⁵ [Dublin City Council \(2022\) Dublin City Development Plan 2022-2028 Draft Written Statement](#)

³⁶ [Dublin City Council \(2016\) Dublin City Local Economic and Community Plan 2016-2021](#)

³⁷ [Dublin City Council \(2020\) Corporate Plan 2020-2024](#)

³⁸ [Dublin City Council \(2019\) Climate Change Action Plan 2019-2024](#)

³⁹ [Dublin City Council \(2017\) Tourism Statement of Strategy and Work Programme 2017-2022](#)

⁴⁰ [Local Enterprise Office Dublin City \(2021\) Development Plan 2021-2024](#)

⁴¹ [Dublin City Council \(2018\) Dublin City Promoting Economic Development 2018-2021](#)

⁴² [Dublin City Council \(2022\) Reset Summit Outcomes Report](#)

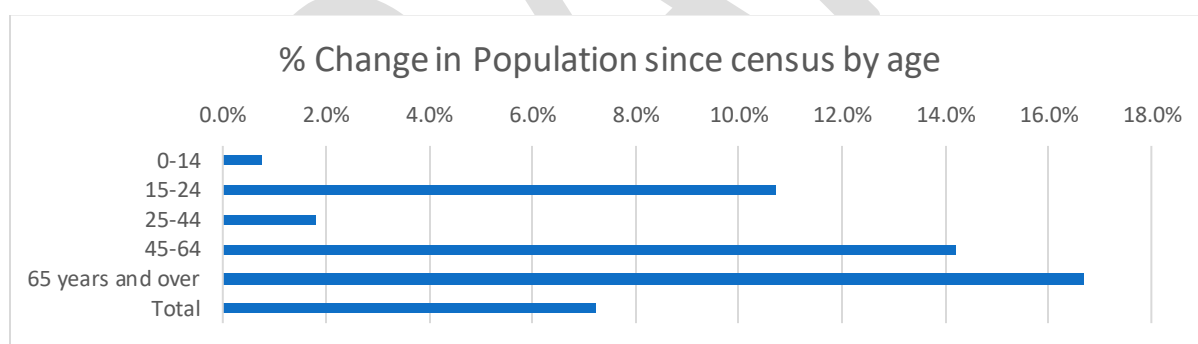
⁴³ [Dublin City Council \(2021\) YDYV Survey Report: Economic Development Plan 2022-2026 Executive Report](#)

6.4 Socio Economic Context

The below review provides key information regarding the socio economic profile of Dublin.

6.4.1 Population

Dublin city is home to 554,554 residents while 1,347,359 or almost 30% of the population of the State live in the wider Dublin county area⁴⁴. As this data is from 2016, an updated estimate by the CSO, stated that the population of the Dublin region was estimated to be 1.43 million people in April 2021⁴⁵. This is a smaller increase than expected mainly due to the slowing of immigration during the Covid-19 pandemic. The CSO estimates immigration slowed to 11,200 in 2021 from the previous five year average of 26,500 per year⁴⁶. Since the 2016 census, approximately 70% of population growth is accounted for by an increase in the 45 years plus cohort. In regard to the older aged population, the 65 year+ age group dependence ratio has risen from 12.2% to 13.4% since 2016. The CSO projects that the dependency rate will continue to rise and that Dublin's overall population will rise by approximately 4.7% by 2036.



Source: EDO (2022) Internal Analysis of Census 2016 Population Stats & CSO 2021 Labour Force Survey

6.4.2 Diversity

According to the 2016 census, almost 18% of Dublin city residents were non-Irish versus 15% for the Dublin region⁴⁷. In 2016 approximately half of the non-Irish population were from within the EU, and just under 10% were from the UK, with the remainder from the rest of the world. This indicates that a sizeable minority of city residents may not have English as their first language.

⁴⁴ [CSO \(2017\) Census 2016 Small Area Population Statistics](#)

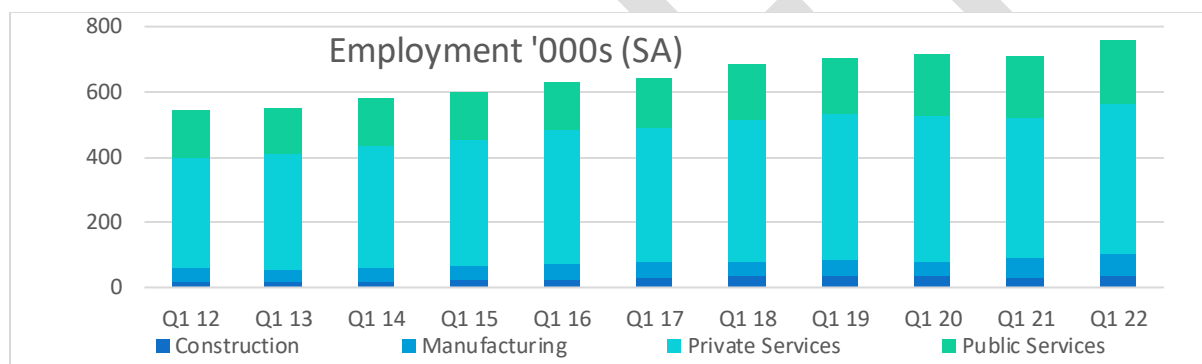
⁴⁵ [CSO \(2021\) Population and Migration Estimates, April 2021](#)

⁴⁶ [CSO \(2021\) Population and Migration Estimates April 2021, Main Results, Table 1.2](#)

⁴⁷ EDO (2022) Internal Analysis of Census 2016 Population Stats

6.4.3 Employment & Labour Market Trends

Dublin accounts for a significant amount of national employment as hundreds of thousands of people commute to work⁴⁸ from the greater Dublin area or further afield⁴⁹. 762,800 people representing over 30% of the national workforce, are employed within Dublin City and County⁵⁰. In 2016, 56.6% of Dubliners indicated that they were “At work” which was consistent across the city and region. By the end of 2021 this had risen to 60.5% in the region. The numbers employed in Dublin has risen by almost 40% over the 10 years to the end of Q1 2022 when it stood close to 761,000 (Seasonally Adjusted - SA). This 10 year increase has likely been caused by ICT jobs doubling and jobs in professional services and education rising by close to 74% and 45% respectively. Construction jobs increased by 160% but this was from a low base⁵¹. Like other mature economies, Dublin is dominated by services with public and private services accounting for 87% of total employment.



Source: Dublin Economic Monitor (2022)

The increase in employment has been facilitated by the labour force increase of approximately 15% since 2016 and an increase in the participation rate from 64.5% to 68.6% over the same timeframe. The unemployment rate for Dublin has also dropped from 7.4% (SA) to 5.8% since the 2016 census. The unemployment rate in the DCC administrative area is traditionally higher than the Dublin region and in 2016 it was 8.3% versus 7.4%. Job postings on the Indeed website were 43% higher than the February 2020 pre-pandemic baseline in the month of May⁵². Increasing jobs postings is contributing to both job growth and skills shortages in specific sectors. Other notable changes since 2016 is the proportion that are “Looking after the home” which has fallen by over a 1/3rd to 4.6% in 2021⁵³. This is likely a result of the ability of people to work from home.

⁴⁸ [CSO \(2017\) Census of Population 2016, Profile 11 Employment, Occupations and Industry](#)

⁴⁹ [DRA & MERA \(2010\) Regional Planning Guidelines for the Greater Dublin Area 2010-2022](#)

⁵⁰ [CSO \(2022\) Labour Force Survey Quarter 1 2022](#)

⁵¹ [EDO \(2022\) Dublin Economic Monitor Pg.10, Internal Analysis of Q1 Labour Force Survey](#)

⁵² [Dublin Economic Monitor \(2022\) Issue 29, pg. 11 Internal Analysis by Grant Thornton & EDO](#)

⁵³ [CSO \(2021\) Labour Force Survey Quarter 4 2021](#)

6.4.4 Household Income

Income per household in Dublin grew 20% from €45,000 in 2016 to €54,000 in 2019. Over the same 4 years, inflation rose by 3% meaning that in real terms, households were 17% better off in 2019 than they were in 2016⁵⁴. From 2016 to April 2022 inflation rose by 11.5%. In inflation adjusted terms household incomes are 8% higher since the last census. In 2016, median household incomes in the DCC area ranged from €28,000 to €96,000. Dublin 4 accounted for 5 of the top 10 highest household income Electoral Districts (ED's) while the North Inner City had 5 of the lowest income ED's.

6.4.5 Poverty

The Consistent Poverty Rate for Ireland has fallen from 8.2% in 2016 to 4.0% in 2021 and from 7.9% to 3.1% in the Eastern & Midland region⁵⁵. Furthermore, the at Risk of Poverty rate has contracted from 16.2% to 11.6% for the country and from 13.8% to 8% for the Eastern & Midland region over the same timeframe. Social transfers are an important mechanism for reducing poverty rates and EU figures for 2020 show these reduced the at Risk of Poverty rate in Ireland from approximately 31% to 13% resulting in Ireland having one of the lowest in the EU.

6.4.6 Education & Future Skills

In 2016 49.3% of those aged 15 years and over in the Dublin Region had a third-level qualification. The proportion for Dublin City was 48.7%. The Q4 2021 CSO Labour Force Survey indicates that the proportion for the Dublin Region has risen to 54.4%⁵⁶. Furthermore, the most recent data also shows that the percentage of people in Dublin educated to junior certificate level has fallen from 24.1% to 13.7% which is supportive of improving socio economic opportunities. An increase in the apprenticeship population is also supportive with numbers nationally almost doubling to 19,630 in 2020 from 10,445 in 2016 partially due to government policy around apprenticeships⁵⁷.

Cedefop, the EU agency for the Development of Vocational training, estimates that to 2030 the largest demand for skills will be in the areas of electronic equipment, construction, sports activities and human health activities. While the occupations most in demand will include health professionals, admin and commercial managers, building tradespeople and cultural professionals.

⁵⁴ [CSO \(2019\) County Incomes & Regional GDP, Table – CIA02](#)

⁵⁵ [CSO \(2021\) SILC, Poverty & Deprivation, Table 3.6](#)

⁵⁶ [EDO \(2022\) Internal Analysis of Labour Force Survey Quarter 4 2021](#)

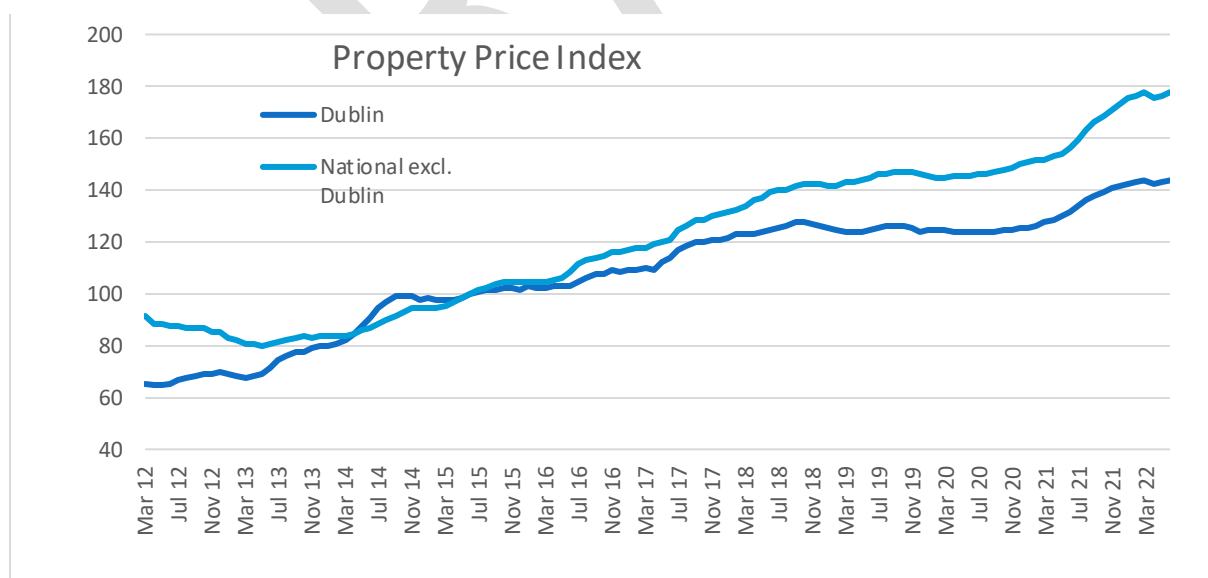
⁵⁷ [IGEES \(2019\) Spending Review, Review of Participation and Costs of Apprenticeships](#)

6.4.7 Digital Connectivity

Digital connectivity in Dublin has increased rapidly since the 2016 Census. By 2020, the Information Society Statistics revealed that broadband access had risen to 92% of households in the Dublin region, an increase of 9% points⁵⁸. Given that on a national basis mobile traffic rose by 145% and mobile subscriptions rose by 18% between 2018 and 2020, it is reasonable to assume that overall access to the internet also increased. Besides good connectivity, household composition and income levels are relevant factors regarding broadband access with the former being the bigger driver. The expansion in internet access and usage has been facilitated by advances in technology and with the evolution of 5G at the end of 2021 this trend is likely to continue.

6.4.8 Residential Property, Prices & Rents

Following the economic and property crash in 2008, property prices in Dublin and Ireland began to recover in 2012 with the rate of growth accelerating as increasing housing demand took hold. House prices remained relatively stable in 2019 and 2020 but continued on an upward trajectory in 2021⁵⁹. The EU 27 and Irish house price indices tracked each other through 2015/16 but began to diverge as the rate of growth in Irish house prices accelerated. Since Q1 2015 Irish property prices have outpaced EU 27 property prices by approximately 28%. The average rent for a property in the capital stood at €1,804 in Q4 2021 which equated to an increase of 28% since Q4 2016. Rents have risen even faster outside of the Greater Dublin Area with average rents increasing by 40% since Q4 2016⁶⁰.



Source: CSO, Residential Property Price Index March (2022)

⁵⁸ [CSO \(2020\) Information Society Statistics – Households 2020, Table 12.2](#)

⁵⁹ [CSO \(2022\) Residential Property Price Index March 2022, National & Regional, Fig 1.3](#)

⁶⁰ [PRTB \(2022\) Internal Analysis of PRTB data, Dublin Economic Monitor Pg.15](#)

- Housing Commencements

The principle reason for increased house prices is the lack of supply. In 2007 there were 9,200 housing commencements in Dublin, however, following the property and banking crash, this fell to below 400 in 2011. Between 2009 and 2012, a total of 2,300 commencement notices were issued in Dublin⁶¹. This has since recovered to reach over 10,000 commencements in 2021, nonetheless, extensive catch up is still needed to compensate for the shortfall of commencements during the years following the crash.

- Housing Tenure

Between 2015 and 2020 the share of individuals in private rented sector (PRS) decreased from 26% to 21%. Over the same timeframe the share of individuals in owner occupied (OO) accommodation increased from 62% to 64% and those in Local Authority (LA) accommodation increased from 10% to 13%⁶². This suggests that the home ownership rate has not been adversely affected by the pressure in the rental market. The share of individuals renting from a local authority increased by 3% since 2015. The movement of individuals from PRS accommodation into OO accommodation supports the narrative that landlords have been exiting the PRS market.

- Commercial Property Trends

Following the 2008 economic crash, the Irish commercial property market began to recover in 2013/14 as leasing and transaction volumes picked up. Vacancy rates began to decline and remained relatively stable from 2016 to 2020 which was followed by a trend reversal during the pandemic as work from home protocols were adopted. Office vacancy rates in the Dublin 2 and 4 areas trended downward from 18% in 2011 to a low of 4% in the first quarter of 2021 before levelling out at 6.5% in Q4 2021. A more modest decline in the office vacancy rate in Dublin suburbs was evident⁶³.

⁶¹ [Dublin Economic Monitor \(2022\) Pg. 15, Internal Analysis of DHLGH data](#)

⁶² EDO (2022) Internal Analysis of Labour Force Survey Q4 2020

⁶³ [EDO \(2022\) Internal Analysis of CBRE data, Dublin Economic Monitor Pg.4](#)

6.4.9 Enterprise Landscape

■ Business Demography

The 2019 enterprise profile shows that approximately 31% of all enterprises nationally are located in the Dublin region. This proportion rises to 50% in regard to Information and Communications Technology (ICT) and 60% for Financial and Insurance Services enterprises. The largest sector in Dublin is Professional Services. Dublin is dominated by micro enterprises (91%), however, these enterprises account for just 12% of total employees with over half of all employees working in large enterprises with 250 people or more⁶⁴. The number of new enterprises created in Dublin 2020 grew by 7.4% Year on Year (YoY). The new enterprises were predominately in Professional Services, Retail and Construction⁶⁵. The number of enterprises cancelling their VAT registrations fell by 38%, which perhaps reflects the effectiveness of pandemic supports.

Sector	2019	Sector	2019
Manufacturing	3%	Arts & Entertainment	7%
Hospitality	5%	ICT	9%
Real Estate	5%	Logistics	11%
Financial & Insurance	5%	Construction	13%
Administration	7%	Wholesale & Retail	13%
Professional	19%	Other	4%

Source: CSO (2019) Business Demography

■ Clusters

Almost 80% of all Creative Enterprises are concentrated in the South East (51%) and Central (27%) areas of Dublin⁶⁶. Both the North West (2%) and North Central (5%) are under-represented. With the South East and Central areas both covering the centre of the City it is unsurprising that the majority of galleries, museums and theatres are located there. However, according to GIS data the North West has just 4 enterprises that can be classified as creative and 2 of them are libraries.

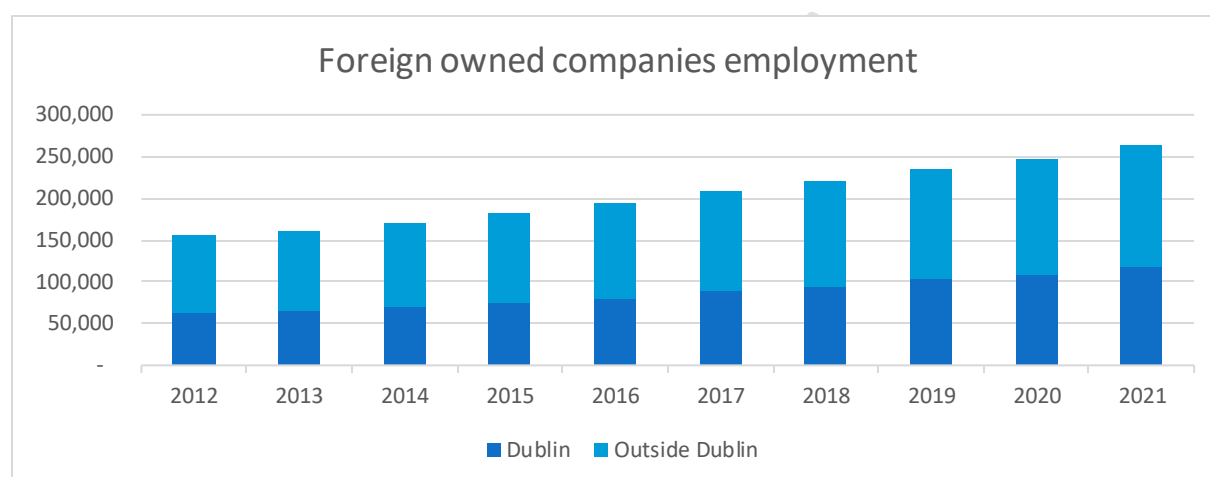
According to GIS data, all sectors except for Transport and Storage, are clustered in the South East area of Dublin with over 50% of all ICT, Professional Services, Financial Services and Real Estate enterprises located there.

⁶⁴ [CSO \(2019\) Business Demography, Table – BRA18](#)

⁶⁵ [Revenue \(2020\) VAT Payments & Returns](#)

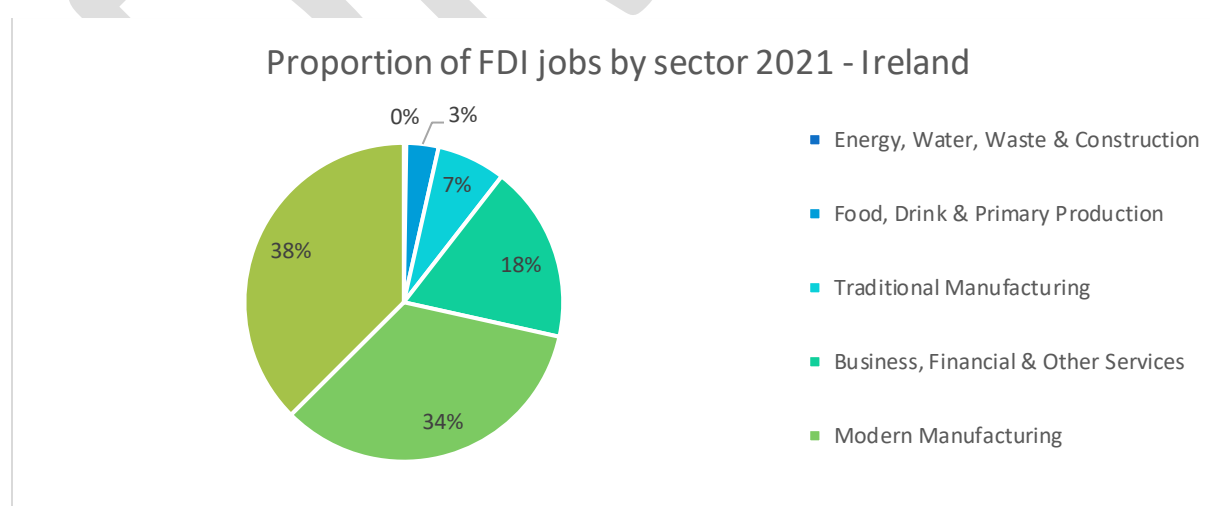
⁶⁶ EDO (2022) Internal Analysis of GIS Data

Dublin has been very successful at attracting multinational companies. In 2021 there were 118,400 jobs in foreign owned companies in the capital representing 16% of total employment. This has almost doubled in the 10 years since 2012 and the employment share has risen from 11%⁶⁷. If jobs dependent on foreign owned companies are factored in, the proportion has risen from 20% (1 in 5 jobs) to 28% (almost 1 in 3 jobs). Within the region, FDI enterprises are predominately located in the Dublin City Council administrative area (70%)⁶⁸.



Source: DETE (2021) Annual Employment Survey

There is no regional breakdown by sector but based on total employment numbers from the CSO it can be assumed that the FDI jobs in Dublin are concentrated in ICT, Business, Financial and Other Services, all of which have seen national FDI job numbers grow by 80%+ in the 10 years to 2021⁶⁹.



Source: DETE (2021) Annual Employment Survey, Table A7

⁶⁷ [DETE \(2021\) Annual Employment Survey , Table B8](#)

⁶⁸ EDO (2022) Internal Analysis of [IDA Company List](#)

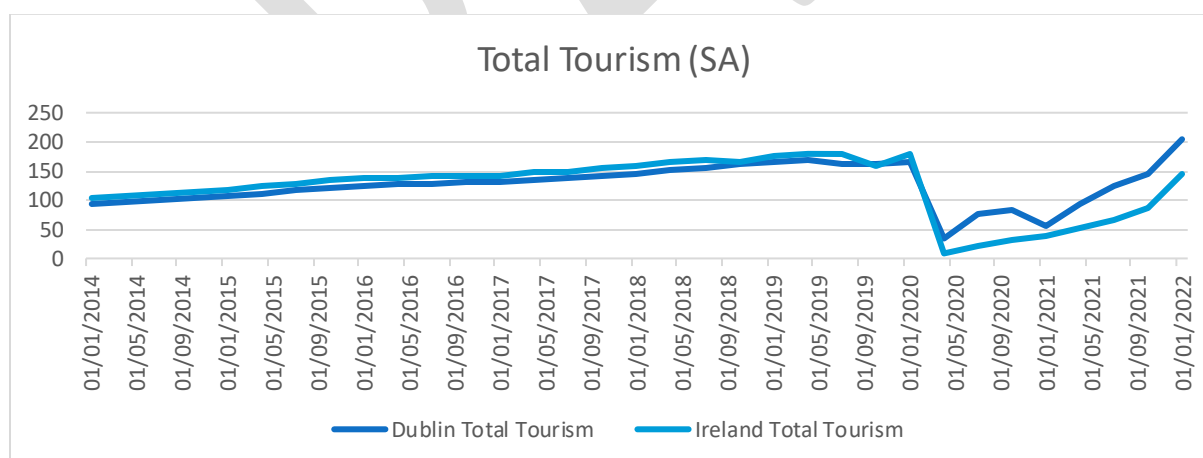
⁶⁹ [DETE \(2021\) Annual Employment Survey, Table A7](#)

6.4.10 Retail

Dublin's retail sector has remained reasonably resilient despite the Covid-19 pandemic. Overall retail sales were buoyed as pent up demand and household savings were released following quarterly contractions. E-commerce increased sharply since the beginning of the pandemic, though it has since stabilised and remains above pre-pandemic levels⁷⁰. The rebound in consumer confidence, footfall and retail sales has been considerable. The next challenge is inflation. There were signs that cost of living pressures are beginning to impact in Q1 2022 with Dublin retail spending showing a decline of 8.1% Quarter on Quarter (QoQ) with all sectors showing some contractions⁷¹.

■ Tourist Spending

Ireland and Dublin's tourism sector has been one of the hardest hit economic sectors as a result of the Covid-19 pandemic. Following the removal of restrictions at the beginning of 2022, robust growth is evident in Dublin's tourism sector. Retail spending by international visitors to Dublin was exceptionally strong at the start of 2022. Total expenditure by tourists rose by 29.9% QoQ and by over 230% YoY to exceed pre-pandemic levels⁷². Hotel bookings have also fared exceedingly well with occupancy rates recovering to pre pandemic levels (80%) by April 2022. This has seen room prices rise to record levels despite an increase in supply.⁷³



Source: MasterCard Spending Pulse (2022), Pg.4

⁷⁰ [MasterCard \(2022\) MasterCard Spending Pulse January 2022 Pg.3](#)

⁷¹ [MasterCard \(2022\) MasterCard Spending Pulse May 2022 Pg.2](#)

⁷² [MasterCard \(2022\) MasterCard Spending Pulse May 2022 Pg.4](#)

⁷³ [Dublin Economic Monitor \(2022\) Pg.8, Internal Analysis of STR Data](#)

- Footfall

Daily footfall figures fell to an index reading of 14 (baseline 07/01/2020) after the onset of the pandemic in Q2 of 2020. After the removal of restrictions at the beginning of 2022, the daily footfall count has recovered and in Q2, 2022 was trending above its pre-pandemic baseline indicating pent up demand⁷⁴. In regard to night time footfall, using January 2020 as the comparative base, trends show a sharp contraction in evening and night time footfall as restrictions hit in Q1 2020, followed by a steady recovery. The contraction in night time footfall was much sharper and the recovery shallower, than in the equivalent evening data.

6.4.11 Transport

At the time of the 2016 census, 25% of commuters in the DCC area were 'active commuters' which compared unfavourably with 35% in the Dublin region. This difference was driven mainly by the lower proportion of working commuters walking or cycling in the DCC area and reflected the higher proportion of private transport use in the DCC area. Approximately 1 in 5 commuters used public transport which is consistent across the Dublin Region and the DCC area. Despite reaching the highest level since the pandemic in Q1 2022⁷⁵, total public transport trips remained a third lower than in the same quarter in 2019 while Google mobility trends show footfall at transit stations 20% lower than their pre-pandemic baseline. Dublin City Cyclist data shows an increase in activity from the beginning of 2019 as active commuting became more popular. However, the pandemic restrictions implemented in Q1 2020 saw activity contract severely. Repeated tightening and relaxing of restrictions have buffeted the recovery and as of the end of March 2022 activity remains below the 2019 average⁷⁶.

At -7%, car traffic volumes were only slightly below their pre-pandemic levels in Q1 2022. In regard to car ownership, the proportion of new electric vehicle registrations nationally has been rising steadily since 2019. This accelerated sharply at the end of 2021, a trend that has continued into 2022. The proportion of new registrations that are electric has risen from 1.5% at the start of 2019 to 15% by March 2022. This has been offset by a decrease in diesel vehicles while petrol has remained constant at 43% of the total⁷⁷. The switch to electric vehicles, rather than active commuting or public transport, appears to be the means by which people are becoming more environmentally friendly in their transport choices.

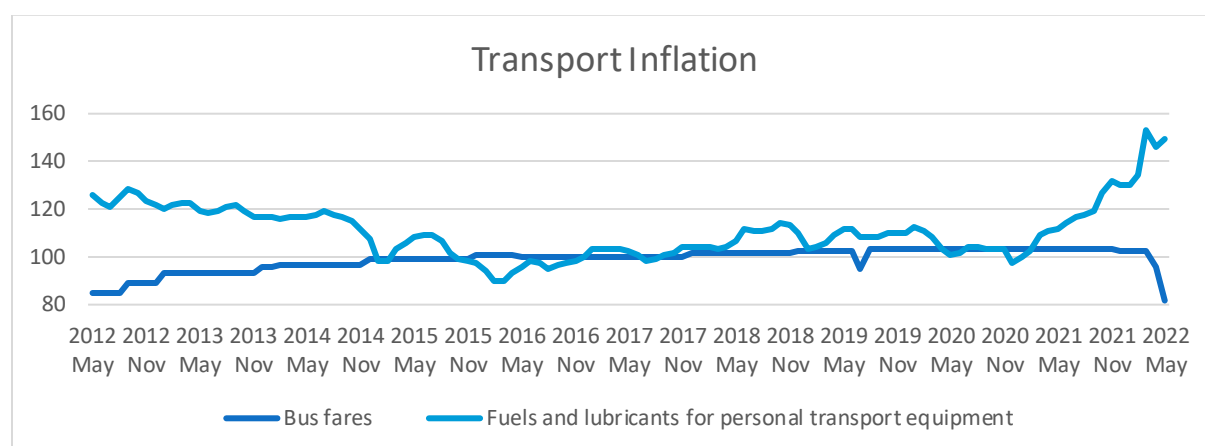
⁷⁴ [EDO \(2022\) Internal Analysis of Smart Dublin DCC Pedestrian Footfall](#)

⁷⁵ [CSO \(2022\) Transport Bulletin April 2022, Table 3.1](#)

⁷⁶ [EDO \(2022\) Internal Analysis of Smart Dublin DCC Cycle Counts](#)

⁷⁷ [CSO \(2022\) Vehicles Licensed For The First Time March 2022, Table 6](#)

However, recent patterns in inflation may influence choices in the medium term. Following a 48% increase in the past 2 years the price of 'Fuel for private transport' is running 35% higher than its 10 year average while bus fares (a proxy for public transport costs) are running 17% lower⁷⁸.



Source: CSO (2022), Consumer Price Index

■ Dublin Airport and Port

Dublin Airport passenger numbers have rebounded up until Q1 2022, however, these remain 50% lower than in pre-pandemic 2019, when passenger numbers were averaging 8 million per quarter⁷⁹.

Throughput (exports and imports) at Dublin Port rose steadily from the time of the last census in 2016 to mid-2019⁸⁰. Since then there has been considerable volatility. In the first instance this was due to uncertainties and changing logistics related to Brexit. Subsequently, pandemic related restrictions and subsequent global supply chain issues exacerbated the volatility.

⁷⁸ [CSO \(2022\) Consumer Price Index May 2022, Table 10](#)

⁷⁹ [CSO \(2022\) Aviation Statistics Q1, Table 2B](#)

⁸⁰ [CSO \(2022\) Statistics of Port Traffic Q1 2022, TBQ05 \(Data seasonally adjusted by Grant Thornton\)](#)