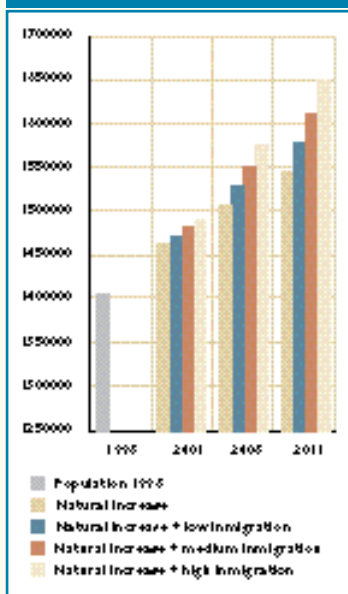




chapter | 3

the scale of future growth

Figure 3.1 Population Growth



3. THE SCALE OF FUTURE GROWTH

Economic prospects for the Greater Dublin Area are good and the employment opportunities arising from increased economic activity will induce in-migration to the area. This, together with natural increase of the population, could result in a total population, in 2011, of about 1.65 million.

More significantly, the number of households in the Greater Dublin Area could increase by as much as 48% to over 660,000 in the period up to 2011, depending on average household size in the future. This arises from social and cultural trends towards increased levels of new household formation and smaller average household size that are largely independent of economic trends.

Employment in the Greater Dublin Area could increase by about 210,000, or almost 40%, in the period up to 2010.

ECONOMIC PROSPECTS

The economic prospects for the Greater Dublin Area are good. National economic forecasts predict that the exceptional performance of the economy is set to continue into the next decade. The ESRI has predicted a cumulative growth in Gross National Product of over 82% in the period 1998 to 2010. Employment growth is also expected to be significant during that period.

The Greater Dublin Area accounts for almost half of national Gross Value Added (GVA). Between 1991 and 1996, GVA in the GDA increased by 63.4%, compared with 57.1% in the State as a whole.

The Greater Dublin Area has been increasing its share of national GVA and this trend is likely to continue so that, by the year 2010, it may account for over half of Ireland's GVA.

Clearly, the potential for growth varies from sector to sector. While all sectors will experience significant growth over the period, the manufacturing, utilities and distribution sectors are likely to expand at the greatest rate, with relatively slower growth in agriculture, construction and non-market services.

With strong economic prospects, it is prudent to plan for significant in-migration to the Greater Dublin Area, together with the housing and other requirements that this will demand.

POPULATION SCENARIOS

A number of population scenarios for the Greater Dublin Area have been prepared to provide an indication of the scale of growth that might be expected in the future. These scenarios reflect different migration assumptions based largely on an assessment of the economic future of the area, as well as current data on in-migration to the country (see Appendix 3 - Technical Note on Population and Household Forecasts). The scenarios are summarised in Table 3.1.

Figure 3.2 Population Trends

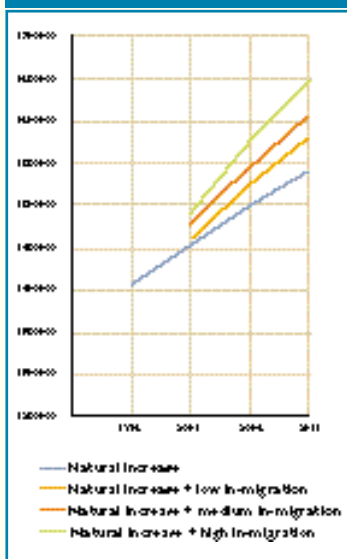


Table 3.1 Population Scenarios for the Greater Dublin Area

	1996	2001	2006	2011	Growth '96-'11
Recorded population	1,405,671				
Assuming natural growth only.		1,463,000	1,511,000	1,545,000	10%
Natural increase + low levels of in-migration		1,471,000	1,530,000	1,578,000	12%
Natural increase + medium levels of in-migration		1,481,000	1,552,000	1,611,000	15%
Natural increase + high levels of in-migration		1,491,000	1,575,000	1,650,000	17%

From the table, it will be seen that:

- Even with no in-migration, there will be an increase in population of about 10% over the period up to 2011.
- Depending on the in-migration assumptions used, total future population of the Greater Dublin Area could range from 1.58 million to 1.65 million by the year 2011.

It will be noted that natural increase will be significant and that this remains the single greatest component of population increase in all of the scenarios. However, in-migration is the more volatile element of population increase and is closely related to economic circumstances and it is thus impossible to accurately predict the precise population of the Greater Dublin Area at a specific date in the future.

The most prudent approach is to plan for a total population of about 1.65 million in the Greater Dublin Area. If this figure is not achieved in 2011, it is likely that it will be shortly thereafter. This scenario allows for the predicted on-going economic growth. However, it will also be important, in planning for the future, to realise that this figure might not be achieved and that a flexible strategy that allows for variations in the anticipated growth should be adopted.

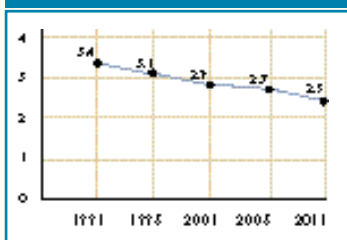
Recent information provided by the Central Statistics Office shows that in-migration to the country is currently very high. The Greater Dublin Area is likely to be attracting a considerable proportion of that in-migration. It is, therefore, possible that population growth at the present time is running ahead of even the high in-migration scenario. However, if this is the case, the high levels of in-migration are unlikely to be sustained and planning for a population of 1.65 million remains the most prudent approach.

CHANGING HOUSEHOLD SIZE

Since 1981, household size has decreased steadily over every intercensal period. Between 1991 and 1996, the average household size in the Greater Dublin Area decreased from 3.4 to 3.1. This trend is expected to continue until the average household size eventually stabilises.

Over the period covered by the Guidelines, average household size in the Greater Dublin Area is estimated to fall to about 2.5 by the year 2011 (Figure 3.3). Within this average, there will be significant variations from one local authority area to another.

Figure 3.3 Average Household Size



The fall in average household size is due to trends towards smaller average family size, coupled with increasing rates of household formation. These trends are evident in all developed countries and reflect social and cultural conditions, including a greater tendency for single people to form households and taking account of household fission and re-formation.

The trend towards smaller average household size has been incorporated into the household formation scenarios, but has been modified to take account of the particular conditions of each local authority area.

FUTURE HOUSEHOLD NUMBERS AND HOUSING REQUIREMENTS

More significant than population for purposes of the Strategic Planning Guidelines will be the total number of households to be accommodated in the Greater Dublin Area in the future as this will effectively determine the requirement for new housing units.

The population scenarios discussed above have been converted to household scenarios, as summarised in Table 3.2.

The most important finding from the review of population and household scenarios is the relatively more rapid growth in household numbers than in population numbers.

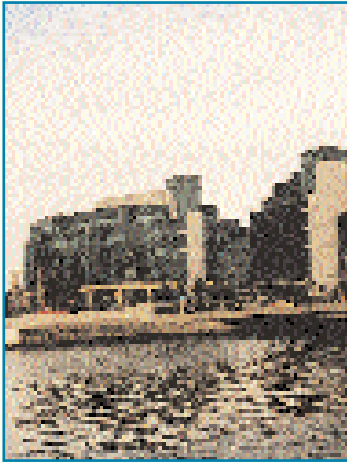
Even if growth in the future is confined to natural increase alone, the numbers of households in the Greater Dublin Area could increase by over a third. If high levels of in-migration are achieved, the growth in household numbers could be almost 215,000 or 48% more than in 1996. This is a significant increase.

Table 3.2 Household Scenarios for the Greater Dublin Area

	1996	2001	2006	2011	Growth '96-'11
Recorded households	446,251				
Assuming natural growth only.		491,000	544,000	604,000	35%
Natural increase + low levels of in-migration		495,000	554,000	622,000	39%
Natural increase + medium levels of in-migration		501,000	566,000	640,000	43%
Natural increase + high levels of in-migration		507,000	579,000	661,000	48%

The figures given in the population and household scenarios above refer to the baseline year of 1996. Some of the predicted growth has, therefore, already taken place and some of the additional households have been accommodated in housing built since 1996, whilst housing currently under construction, or for which planning permission is outstanding, will accommodate another portion of the growth.

Nevertheless, the accommodation of the very large increases in the projected household numbers, together with the associated employment, services and facilities is the major planning challenge to the Greater Dublin Area over the coming 12 years.



FUTURE EMPLOYMENT

Based on national economic forecasts it is estimated that the numbers employed in the Greater Dublin Area are likely to increase to approximately 770,000 by 2010. This is almost 40% higher than the 558,400 at work in 1997.

Approximately 210,000 additional jobs are therefore likely to be in place in the Greater Dublin Area in 2010. This translates to an average of 16,000 additional jobs per annum. In line with falling dependency rates and increasing labour force participation projections, employment growth is forecast at a higher rate than population increases over the period.

With the exception of agriculture, forestry and fishing, employment is forecast to increase in all sectors of activity, with the largest absolute increases in commercial, business and professional services.

