

Waterford Baseline 2015

Waterford Local Economic & Community Plan 2015-2020



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& Contae Phort Láirge**
Waterford
City & County Council

Prepared by Economic Development Department, Waterford City & County Council, August 2015

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This report has been compiled using 2011 Census data, which can be viewed online at www.cso.ie unless an alternative data source is referenced. Additional data is available on [StatBank](#)

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Key Demographics of Waterford

People & Places

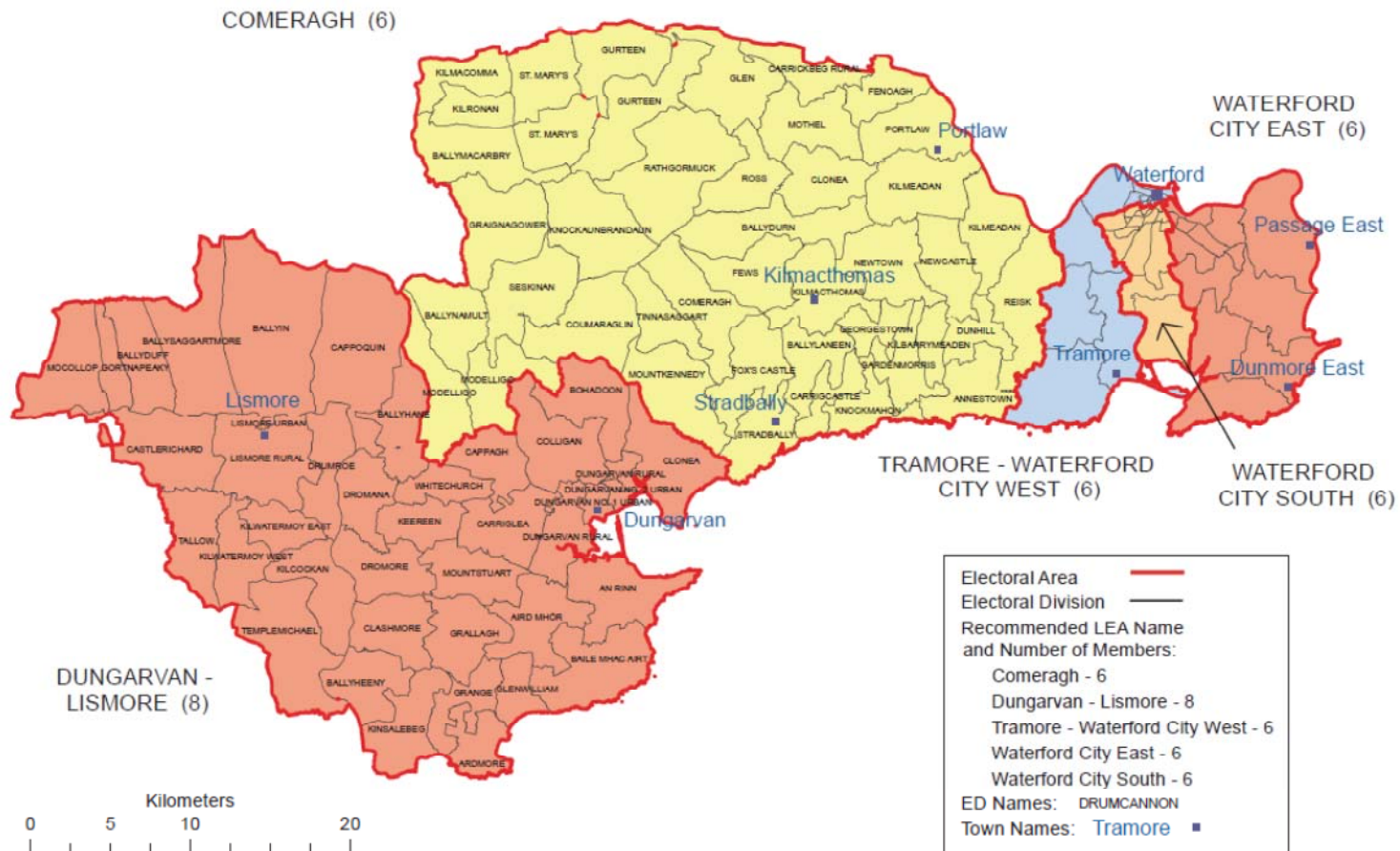
- In April 2011, Waterford had a population of 113,795, consisting of 56,464 males and 57,331 females.
- The population of the Waterford Metropolitan Area as of Census 2011 was 65,928.
- There is a high young dependency ratio – 33% with 24,580 people under the age of 14.
- The old dependency ratio is 19.9%, with 14,779 persons aged 65 years or older.
- The average age in Waterford was 36.9 years.
- There were 8,644 pre-schoolers, 12,828 primary school children and 8,806 secondary school age living in Waterford.
- The number of persons aged 18 years or over was 84,887.
- There are 29,924 families in Waterford with 40,397 children.
- There were 5,807 lone parents – 5,026 lone mothers and 781 lone fathers.
- The average number of children per family was 1.3.
- Marital breakdown was at 10.4% compared to 9.7% nationally.
- There are 42,335 private households in the area with high levels of home ownership (69.8%).
- Private rented accommodation accounts for 14.7% of households.
- 11.1% of accommodation is rented from the local authority.
- Non-Irish nationals made up 10.2% of Waterford's population: UK (3.0%); Poland (2.0%); Other EU (2.2%); Rest of World (2.8%).
- 9,888 speak a foreign language.
- Of those that speak foreign languages at home, the majority (78.3%) speak English very well or well.
- 18.6% have a third level qualification or higher, compared to an average of 24.6% for the State.
- 16.2% have no formal or only primary level education.
- There are 9,873 individuals aged 15+ still at school.
- The school dropout rate was 11.3% compared to 9.4% nationally.
- The majority (60.1%) considered their health as very good.
- 15,635 reported having a disability which represents 13.7% of Waterford's population.
- There were a total of 4,823 carers in 2011.
- The Pobal HP Index classifies Waterford City and Waterford County as 'Marginally below Average' on the Relative Index Score.

Economy

- There was a labour force participation rate of 60%, with 53,514 in the labour force.
- 35,701 were not in the labour force.
- The unemployment rate based on the Principal Economic Status (PES) basis was 21.6% compared to 19.0% for the State.
- The Metropolitan District has the highest unemployment rate at 23.5%.
- There are seven unemployment black spots in Waterford City.
- Live register figures for July 2015 were 11,960 which are down 9.4% on the same month in 2014.
- In Q2 2015 the unemployment rate for the South East was 12.8% compared to 9.9% for the State.
- The day time working population of Waterford (resident and non-resident) was 36,178.
- 41,942 workers were enumerated in Waterford and 12,196 of these worked outside of Waterford.
- In 2012, there were 4,041 active enterprises in Waterford.
- In Waterford 90.1% of all enterprises were micro enterprises accounting for 23% of employees. There were 15 companies with 150+ employees which account for 32% (7,193) of all employees in Waterford.
- The dominant sectors are Wholesale & Retail and Construction.
- In Q4 2014, Waterford had a commercial vacancy rate of 13.4% compared to 12.8% for the State.
- In 2012, disposable income for Waterford was €18,610 which is 93.5% of the State's figure of €19,468.
- GVA per person for the South East was €23,588 or 68.8% of the State figure of €34,308.
- 19.9% of the State's GVA from agriculture is earned in the South East.
- 65% of GVA in the South East is earned from Market and Non Market Services.
- In 2013, there were 225,000 overseas visitors to Waterford with a spend of €49m.
- In 2012, the estimated aggregate retail sales for Waterford were €393m for comparison and €287m for comparison shopping.
- The average farm size is 44.7ha which is the largest in Ireland.
- Agriculture employs 3,585 farmers and 667 workers.
- The Port of Waterford deals with almost 3% of national tonnage.

Introduction

This socio economic profile has been prepared as part of the process of preparing a Local Economic & Community Plan (LECP) for Waterford and to provide an evidence base to underpin the objectives and actions outlined in the LECP. Where relevant and available, data will be provided at Municipal District level, Waterford, the South East and for the State. For electoral purposes Waterford is divided into three Municipal Districts (MD) which are illustrated in the map on below: Waterford Metropolitan Area, Comeragh and Dungarvan-Lismore.

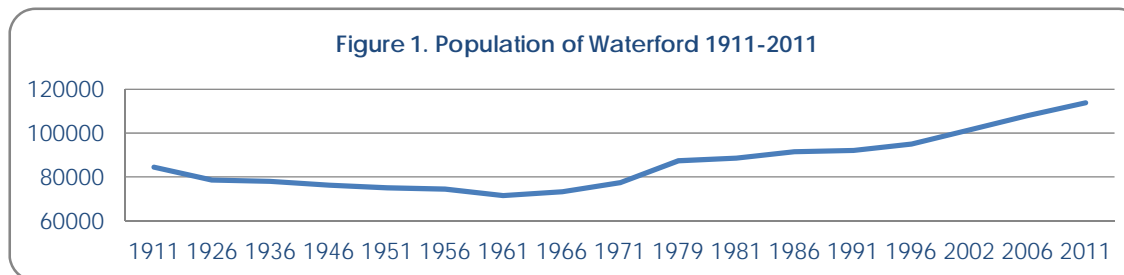


People & Places

People and Population Change

Waterford covers a land area of 1,835.57km². At 62 persons per km², the population density in Waterford equated to 92.5% of the State average. The population of Waterford in 2011 was 113,795. The population of Waterford increased 5.4% (5,834) on the previous census with the majority of the increase happening in Waterford County (4,850). Dungarvan Town experienced a 2.3% increase and Tramore’s population increased by 5.8%.

1. Population of Waterford and Metropolitan Districts 2011	
Waterford Metropolitan District	65,928
Dungarvan Lismore	28,490
Comeragh	19,377
Waterford City	46,732
Dungarvan	7,991
Tramore Town	9,722
Waterford	113,795
South East	497,578



Population Projections

Population targets have been set for the South East region by the Department of Environment, Heritage and Local Government. Within the region, population targets are set for each local authority area and for the main urban centres to provide a guide for population growth in the region.

2. Population Targets for Waterford and South East 2016 & 2022					
	Waterford City	Waterford City & Environs	Dungarvan	Waterford County	South East
2016	51,000	56,500	11,600	73,223	542,200
2022	55,000	62,500	13,400	79,495	580,500

Source: Regional Planning Guidelines for the South East 2010-2022

Dependency

Dependency¹ ratios give a useful indication of the age structure of the population and are a valuable tool for identifying population change and age dependency trends for the provision of future services and the planning of future economic and infrastructure needs. Dependency is also an important

¹ Dependency is expressed as a percentage of the total population aged between 15 to 64 years. Dependency ratios give a crude indication of the population and are not entirely precise as variations occur over time in the number of young persons staying on longer in full time education and in the number of persons over 65 continuing to work. The relative proportions of persons aged 15-64 who are inside and outside of the labour force may also vary over time.

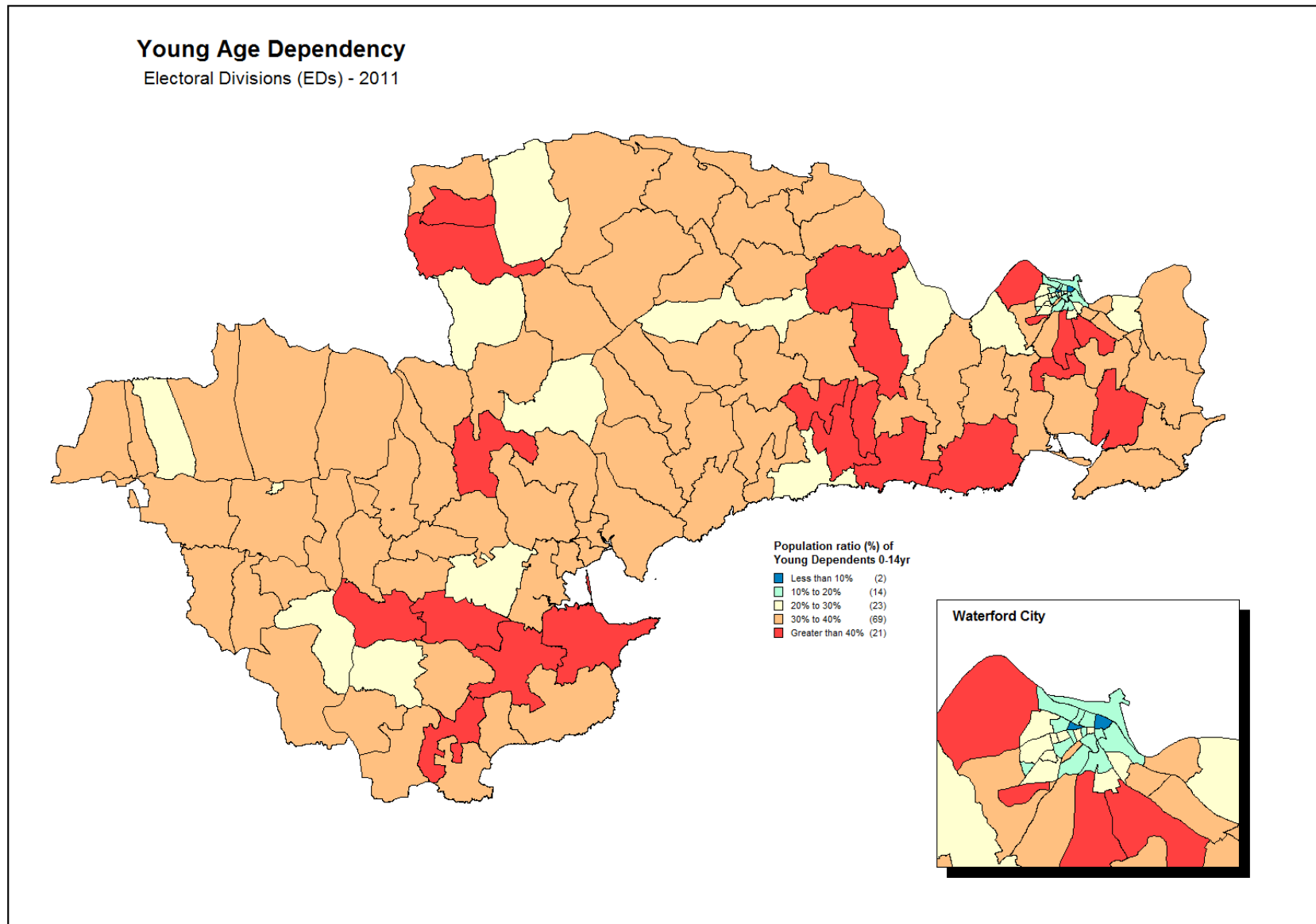
Waterford Baseline

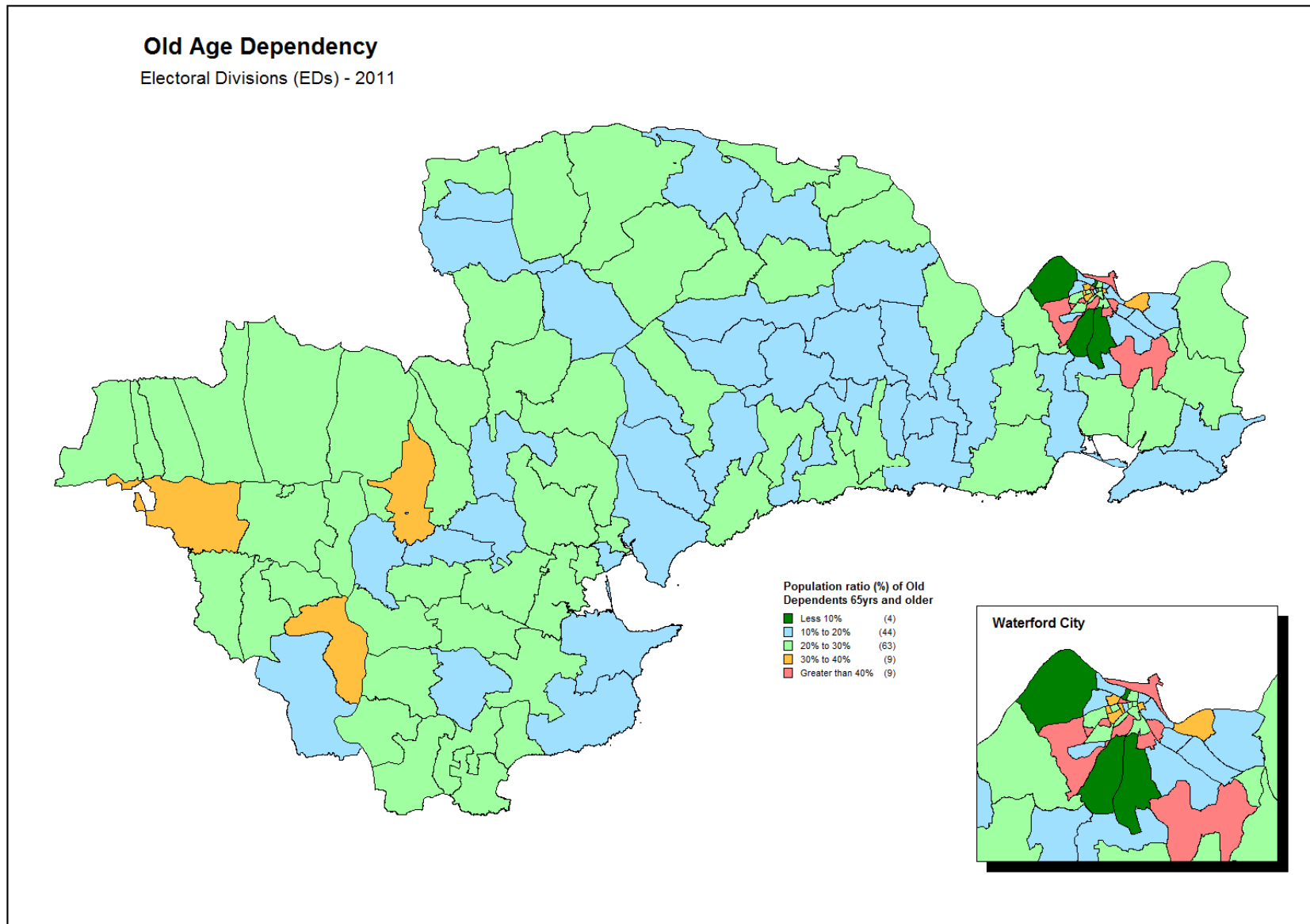
determinant of sustainable economies is the ability to retain a healthy working age cohort and to attract inward migration of those of a working age therefore, an increase in the core working age cohorts is a positive indicator of economic performance and can be identified in relative age dependency rates.

Dependents are defined for statistical purposes as people outside the normal working age of 15-64. Overall, Waterford has a high young dependency ratio (children under 14 years) of 33% with 24,580 people aged 14 years or younger. Comeragh Municipal District has the highest young dependency ratio at 36.3%. In numeric terms, Waterford Metropolitan District has the highest number in this age cohort with 13,839 aged 14 years or younger. A relatively high young dependency ratio indicates a naturally expanding population, which is generally positive for the long term economic potential of an area. A high young dependency ratio also has implications in terms of demand for childcare, healthcare and educational services in particular.

The old dependency ratio for Waterford is 19.9% and there is a large cohort of older people living in Waterford (14,779 aged 65+) with varying old dependency ratios across the Municipal Districts. Waterford Metropolitan District has the lowest old dependency ratio at 19.3% and Dungarvan has the highest at 21.2%. High levels of old dependency signals areas with relatively greater demands for accessible health services and locally based home care provisions in particular.

3. Dependency Ratios for Municipal Districts, Waterford, South East and State 2011					
Electoral Area	Young Dependency Ratio	Population aged 14 years or younger	Old Dependency Ratio	Population aged 65 years or over	Total Dependency Ratio
Metropolitan District	31.7%	13,839	19.3%	8,443	51.0%
Dungarvan Lismore	33.9%	6,230	21.2%	3,889	55.1%
Comeragh	36.3%	4,511	19.7%	2,447	56.0%
Waterford	33.0%	24,580	19.9%	14,779	52.9%
South East	33.8%	109,878	19.3%	62,821	53.1%
State	31.9%		17.4%		49.3%



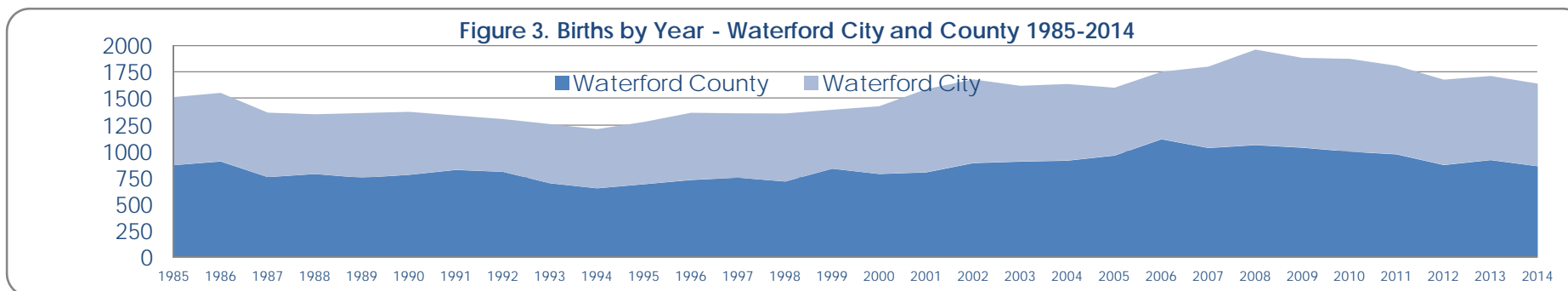
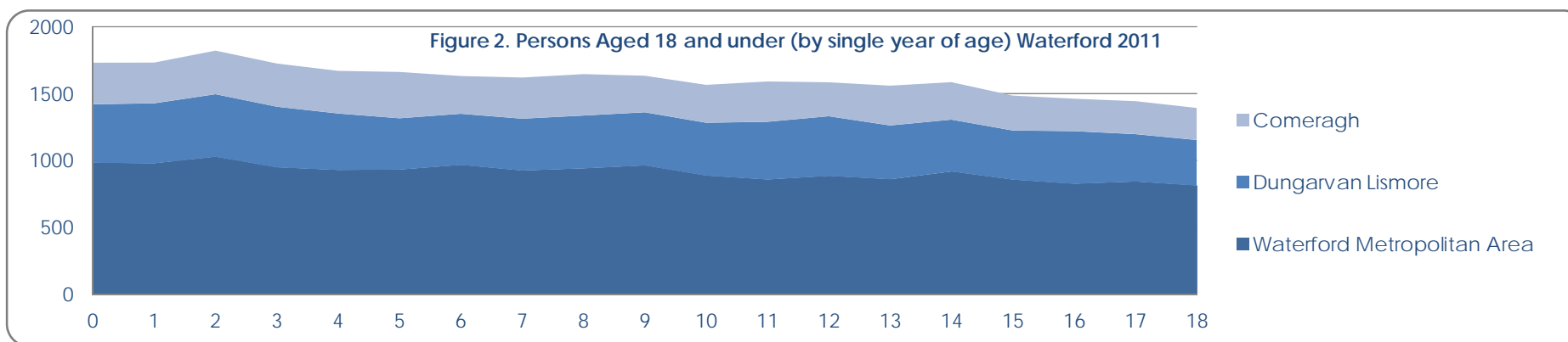


Waterford Baseline

The average age nationally in 2011 was 36.1 years and both Waterford City at 36.7 and Waterford County at 37.1 were just slightly above the national average. In Waterford County there was a slight difference in the average area in towns (36.4) versus the rural areas (37.4). The average across Waterford was 36.9 years. Life expectancy at birth was 78.3 for males and 82.7 for females (Source: Irish Life Tables 2010-2012).

Figure 2 shows that in 2011 there were 8,644 pre-school children aged 0-4. The primary school population (aged 5-12) stood at 12,828 in 2011. The secondary school age group (13-18) had a total population of 8,806.

There was a small drop off in births from a high of 1,954 in 2008. In 2014, there were 1,635 births in Waterford, a decrease of 72 on the previous year (Figure 3).



Source: Vital Statistics 2015

Families

Tables 4, 5, 6, 7 and 8 provide an insight into the composition of families for Waterford. There are 29,924 families² within the area with a total of 40,397 children. 12,228 families were made up of 2 persons, representing 40.9% of all families in Waterford.

4. Families, family members and children in families by size of family 2011						
	2 Persons	3 Persons	4 Persons	5 Persons	6 or more Persons	Total
No of Families	12,228	6,966	6,351	3,044	1,335	29,924
No of persons in families	24,456	20,898	25,404	15,220	8,460	94,438
No of children in families	3,362	8,568	13,288	9,311	5,868	40,397

Table 5 highlights that there are 8,866 families without children. Of the families with children, one child is the most common (8,726) representing 29.2% of all families. Families with two children closely followed with 24.6%. The average number of children per family was 1.3 compared to 1.4 nationally.

5. Family Units with children by size and age of children 2011				
	All children under 15	All children 15 or over	Children both under and over 15	Total
Families without children	0	0	0	8,866
Families with 1 child	3,997	4,729	0	8,726
Families with 2 children	3,912	2,258	1,197	7,367
Families with 3 children	1,686	596	1,169	3,451
Families with 4 children	444	132	559	1,135
Families with 5 or more children	85	40	254	379

6. Family units with children by type of family and age of children 2011			
	Couples with children	Lone mothers with children	Lone fathers with children
No of families			
All children under 15	7,575	2,375	174
All children over 15	5,166	2,033	556
Children under and over 15	2,510	618	51
Total no of family units	15,251	5,026	781
No of children			
All children under 15	15,129	3,693	274
All children over 15	8,221	2,797	750
Children under and over 15	7,594	1,789	150

² A family is defined as a couple with one or more children, a couple without children or a lone parent with one or more children.

7. Families by Family Cycle 2011		
	No of families	No of family members
Pre family	2,698	5,396
Empty Nest	3,466	6,932
Retired	2,702	5,404
Pre School	3,294	10,275
Early School	3,435	13,016
Pre-Adolescent	3,395	13,504
Adolescent	3,689	14,762
Adult	7,245	25,149
Waterford	29,924	94,438

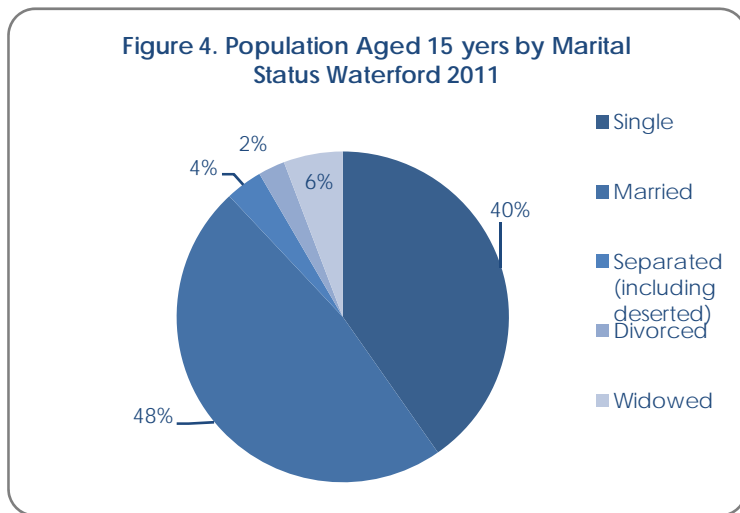
The number of lone parent families stood at 5,807 of which 5,026 were lone mothers and 781 were lone fathers. According to the CSO Survey on Income & Living Conditions (2013), those living in households with one adult and one or more children had the highest deprivation rate in 2013 at 63.2%.

The majority of families (24.2%) comprise of adults. Pre School and Early School children were present in a total of 6,729 of 29,924 families (22.5%) while Pre-Adolescent and Adolescent children were present in 7,084 families (23.7%).

There were 42,335 private households in Waterford of which 10,604 were single person households. Of the 29,924 families in the area, 8,866 were couples with no children.

8. Families by Household Type 2011		
	Households	Persons
One Person	10,604	10,604
Husband and Wife	6,494	12,988
Cohabiting Couple	1,716	3,432
Husband, wife and children	12,904	52,533
Cohabiting couple and children	1,510	5,706
Father and Children	682	1,722
Mother and Children	4,303	11,541
Couple and others	469	1,524
Couple, children and others	642	3,280
Father, children and others	62	218
Mother, children and others	373	1,366
Two or more Family Units	381	2,010
Non-family households and relations	940	2,112
Two or more non related persons	1,255	3,225
Waterford	42,335	112,261

Marital Status & Breakdown



Nationally the level of marital breakdown is at 9.7%. Limerick City has the highest rate of marital breakdown in the country at 13.5%. Waterford has a rate of 10.4% which is slightly higher than the national rate. Of the 89,215 persons aged 15 years and over, 35,925 were single, 42,588 were married, 3,216 were separated, 2,323 were divorced and 5,163 were widowed.

Housing Stock

Tables numbered 9, 10, 11 and 12 analyse housing stock on the basis of household size, type of accommodation, the year the house was built and the type of occupancy. There were 42,335 private households in Waterford. A two person household³ is the most common in the area, accounting for 29.7% of all households, followed by one person households with 25% (10,604). The average number of persons per household was 2.7 which is in line with the national figure of 2.7. The city had a slightly lower occupancy at 2.5 compared to Waterford County at 2.8.

9. Private Household by Size 2011		
	Households	Persons
1 person	10,604	10,604
2 person	12,587	25,174
3 person	7,397	22,191
4 person	6,726	26,904
5 person	3,377	16,885
6 person	1,211	7,266
7 person	305	2,135
8 or more persons	128	1,102
Waterford	42,335	112,261

92.0% of households lived in a House/Bungalow while a further 5.9% lived in flats, apartments or bedsits.

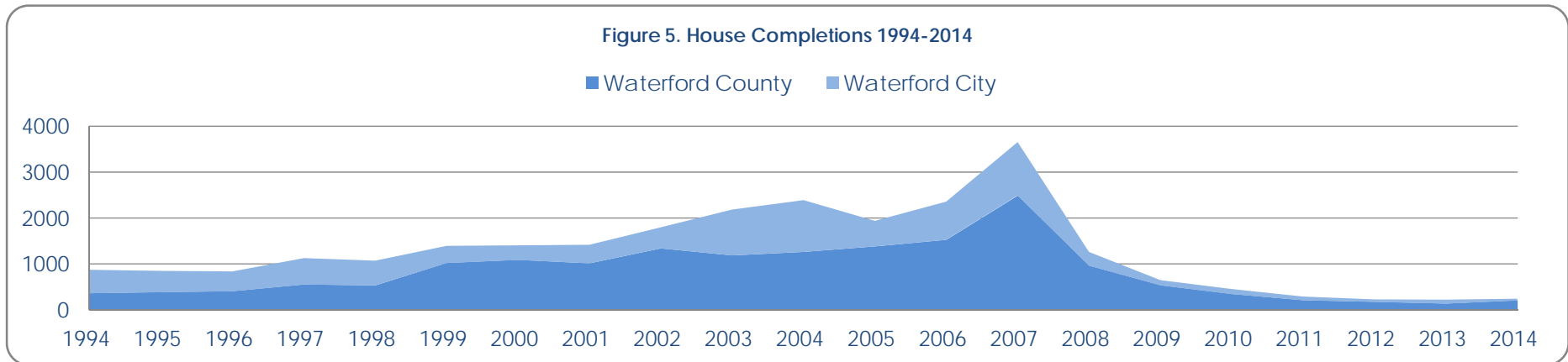
Waterford has a relatively modern housing stock with 16,932 households (40%) built in the previous 20 years (1991 or later). Dungarvan Lismore has the highest level of older housing stock accounting for 31.1% of households built before 1946.

10. Private Households by Type of Accommodation 2011		
	Households	Persons
House/Bungalow	38,960	106,085
Flat/Apartment	2,513	4,108
Bed-Sit	65	145
Caravan/Mobile Home	96	227
Not Stated	701	1,696
Waterford	42,335	112,261

³ A private household is defined as either one person living alone or a group of people living at the same address with common housekeeping arrangements. A household can contain one or more families.

11. Permanent Private Households by Year Built 2011		
	Households	Persons
Pre 1919	4,697	10,289
1919 - 1945	2,700	5,957
1946 - 1960	2,795	6,355
1961 -1970	2,794	6,576
1971 - 1980	5,493	14,287
1981 - 1990	4,843	13,863
1991 - 2000	6,316	19,209
2001 - 2005	6,756	19,897
2006 or later	3,860	10,749
Not Stated	1,985	4,852

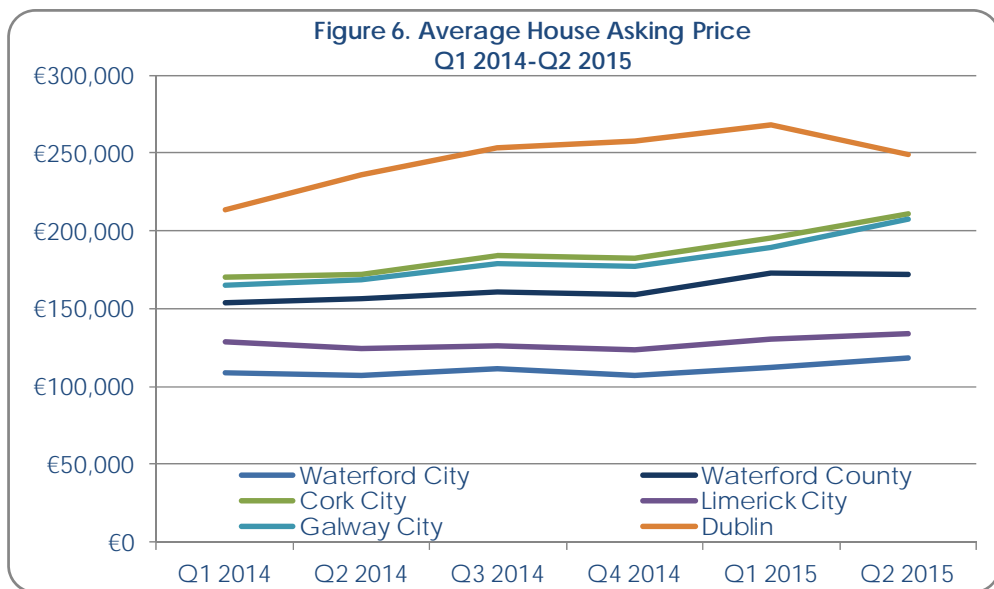
Figure 5 shows that house completions in Waterford peaked in 2007 at 3,633. 2014 saw a small increase of 21 on the previous year with a total of 232 completions (based on the number of new dwellings connected by ESB networks).



Source: DECLG 2015

12. Permanent Private Households by Type of Occupancy and Municipal District 2011								
	Owner occupied with mortgage	Owner occupied no mortgage	Rented from private landlord	Rented from local authority	Rented from voluntary body	Occupied free of rent	Not Stated	Total
Waterford Metropolitan	8,245	7,822	4,464	3,368	527	250	396	25,072
Dungarvan Lismore	3,401	4,256	1,333	985	69	217	154	10,415
Comeragh	2,773	2,969	400	337	35	159	79	6,752
Waterford	14,419	15,047	6,197	4,690	631	626	629	42,239
Waterford %	34.1%	35.6%	14.7%	11.1%	1.5%	1.5%	1.5%	
South East %	34.5%	38.0%	14.4%	8.9%	1.1%	1.7%	1.3%	
State %	26.7%	27.5%	18.5%	7.8%	0.9%	1.5%	1.5%	

There is a high level of home ownership in Waterford, with a total of 29,466 homes (69.8%) owner occupied. Figure 6 shows the average asking price for a house in Waterford City compared to the other urban areas. In Q2 2015, the average asking price in Waterford City was €118,234 compared to €172,167 in Waterford County. Average house prices in Waterford are lower than the other major urban areas.



Source Daft.ie

Private rented accommodation accounted for 14.7% of households while 11.1% of accommodation was rented from the Local Authority. Waterford City East had the highest level of private rented accommodation (19.5%), while Comeragh had the lowest (5.9%). Waterford City South had high levels of Local Authority Rented households at 21.2% with a further 4.0% rented from a voluntary body.

Department of Environment, Community & Local Government figures show that as of 31st December 2013 there were 4,096 local authority rented dwellings in Waterford City (2,974) and County (1,122).

The distribution of houses rented from local authorities and voluntary bodies as a percentage of all private households is an indicator of low income families at risk of poverty and social exclusion.

Figures from DAFT.ie for Q1 2015 show an average monthly rent in Waterford City of €634 and Waterford County of €584 which compares to a national average of €960. Average rent in Waterford City is lower than the other major urban areas.

PC Ownership & Internet Access

High speed broadband is a key enabler for a connected society. Broadband services are essential to our future competitiveness and will be a driving force in job creation. Broadband usage in Waterford is now at 62.8% compared with 63.8% nationally. 66.4% of city households had broadband compared to 60.1% in Waterford County. 27.3% of all respondents had no internet connection. Ownership of a computer is an important indicator as it demonstrates the potential that households have to access and utilise the internet. In Census 2011, of those that replied 30,170 (71.4%) do own a PC which is lower than the national level of ownership at 74.3%.

Sewerage, Heating & Water Supply

Figure 7. Permanent Private Households by Central Heating, 2011

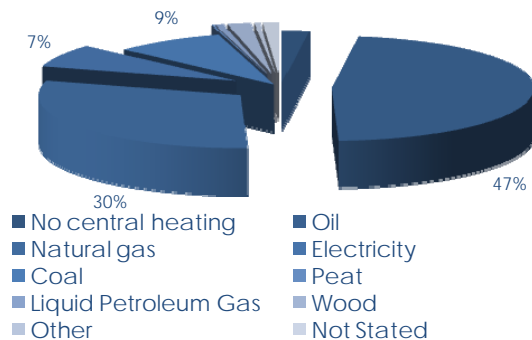


Figure 8. Permanent Private Households by Sewerage Facility, 2011

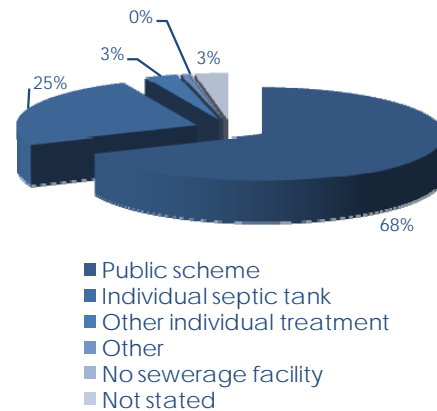
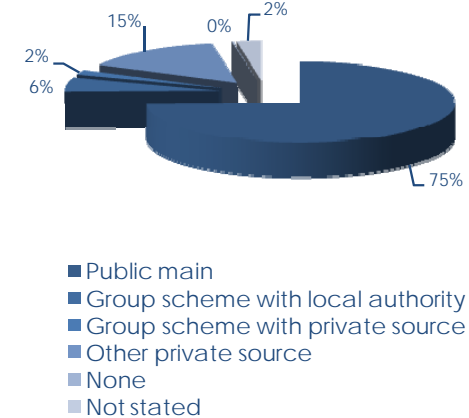


Figure 9. Permanent Private Households by Water Supply, 2011



74.6% of households got their water supply from public mains, with a further 14.8% coming from another private source. 68.6% of households disposed of their waste using a public sewerage scheme. Of the remaining homes, 24.7% used an individual septic tank. A question on central heating was asked for the first time in 2011 and almost half (47.3%) responded that they use oil. A further 30.1% used natural gas.

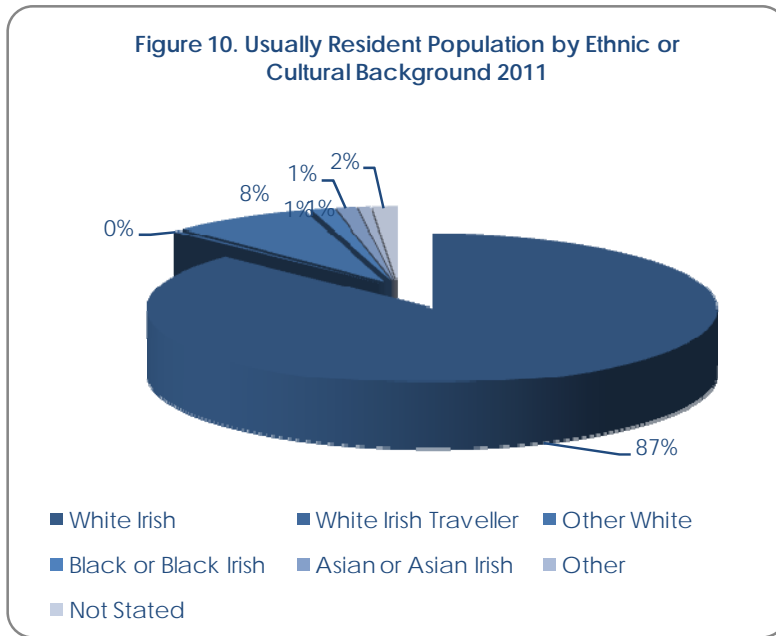
Nationality, Ethnicity, Language & Religion

13. Usually Resident Population by Place of Birth 2011							
Location	Ireland	UK	Poland	Other EU 27	Rest of World	Not Stated	Total
Waterford Metropolitan	54,916	3,743	1,349	1,824	3,367	0	65,199
Dungarvan Lismore	24,189	2,140	688	585	579	0	28,181
Comeragh	17,528	1,259	69	161	267	0	19,284
Waterford	96,633	7,142	2,106	2,570	4,213	0	112,664
Waterford %	85.8%	6.3%	1.9%	2.3%	3.7%		
South East %	86.4%	6.1%	2.5%	2.3%	2.6%		
State %	83.0%	6.4%	2.5%	3.3%	4.7%		

Place of birth provides a strong indicator of longer term migration. The number of Waterford residents who were born outside of Ireland stood at 6,031 or 14.2% of the population. Of those born outside of Ireland 6.3% were from the UK, 1.9% from Poland, 2.3% from Other EU 27 and 3.7% Rest of World.

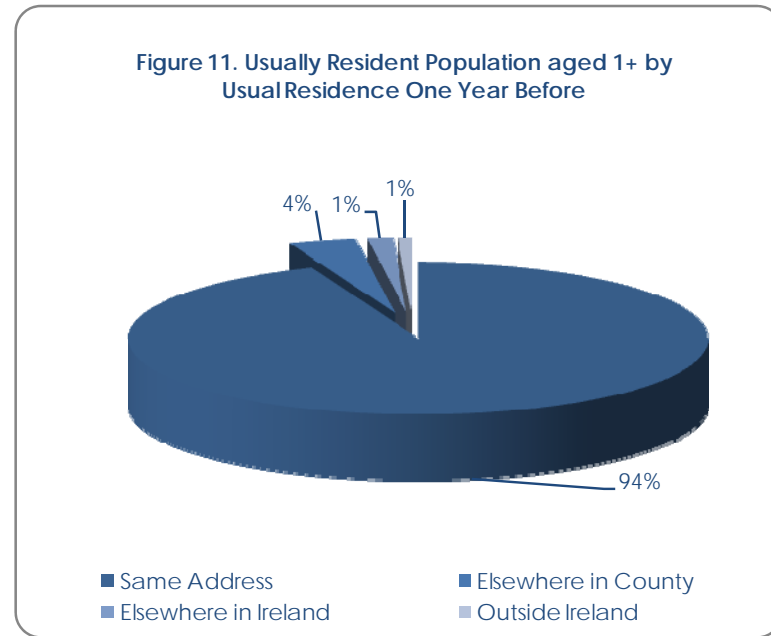
Non-Irish nationals living in the area accounted for 10.2% of the total population compared to the national average of 12.0%. 13.0% of Waterford City's population were non-nationals, compared to 8.3% in Waterford County. UK nationals (3,605 persons) were the largest group followed by Polish (2,251).

14. Usually Resident Population by Nationality 2011							
Location	Ireland	UK	Poland	Other EU 27	Rest of World	Not Stated	Total
Waterford Metropolitan	56,685	1,449	1,816	2,714	881	1,654	65,199
Dungarvan Lismore	25,066	1,275	728	553	330	229	28,181
Comeragh	18,138	676	74	151	132	113	19,284
Waterford	99,889	3,605	2,251	2,520	3,176	1,223	112,664



The White Irish population accounted for 87.1% of the population in the area. 1.4% did not state their ethnicity. The remaining 11.5% was made up of Other White (7.9%), Black or Black Irish (1.3%), Asian or Asian Irish (1.2%), Other (0.7%) and White Irish Traveller (0.4%).

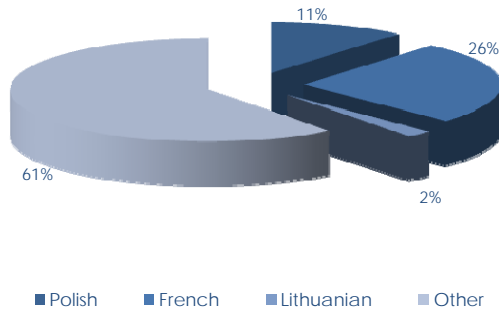
The Annual Count of Traveller Families produced by the DECLG in 2013 shows that there were 169 Traveller families living in Waterford. 72% of these resided in accommodation provided by local authority or local authority assistance.



Usual residence one year ago provides information on inward migration in the year leading up to the Census. 94% of the usually resident population aged 1+ were still living at the same address as they were one year earlier. 3.8% had moved from elsewhere in Waterford in the last 12 months. 1.4% moved from elsewhere in Ireland while a further 0.8% moved from outside Ireland.

Languages

Figure 12. Speakers of Foreign Languages by Language Spoken, 2011



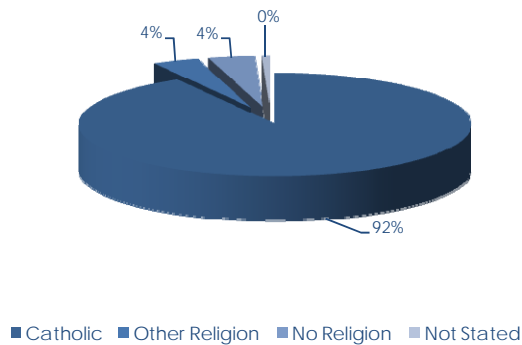
46,746 persons could speak the Irish language and of these, 15,928 spoke the language daily. Within the Waterford Gaeltacht, there was a decline in the number of daily Irish speakers from 456 to 438.

A question on foreign languages was asked for the first time in Census 2011 and covered both foreign languages spoken at home and how well those who spoke other languages could speak English. The results show that 9,888 residents spoke a foreign language and that Polish was the most common language spoken with 2,182 speakers followed by French and Lithuanian.

Of those who spoke a foreign language at home, the majority (78.3%) indicated that they spoke English very well or well. 1,772 could not speak English well or at all.

Religion

Figure 13. Population by Religion, 2011

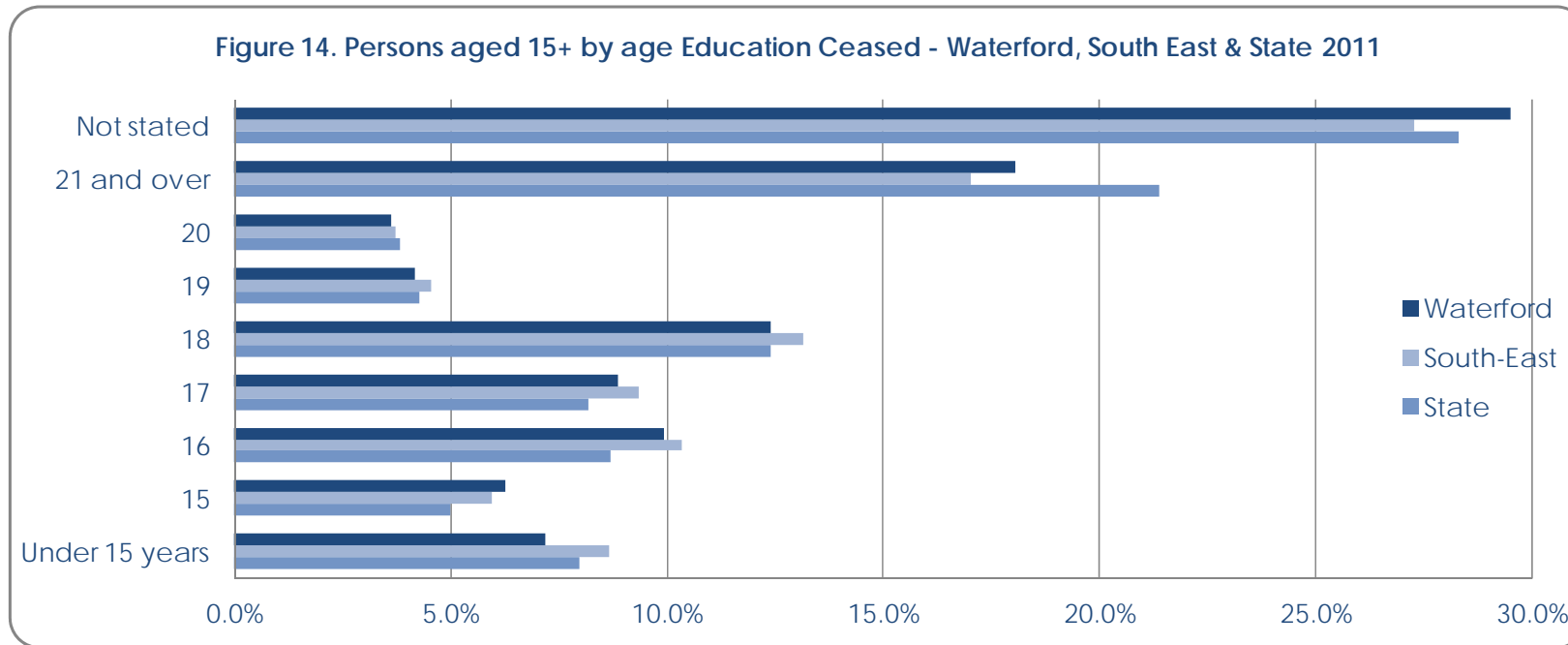


A question on religion shows that Ireland and Waterford remains predominantly Catholic with over 86% (98,777) declaring themselves as Roman Catholic. A further 7,759 were adherents of other stated religions (e.g. Church of Ireland, Islam, Presbyterian, Orthodox) while 5,682 persons indicated they had no religion.

Education

The figures and tables on the following pages analyse the educational attainment of residents of Waterford and provide details of education provision in Waterford. In general Waterford and the South East underperformed compared to the State in educational attainment with a higher proportion of early school leavers and a lower proportion of the population with a third level degree or higher.

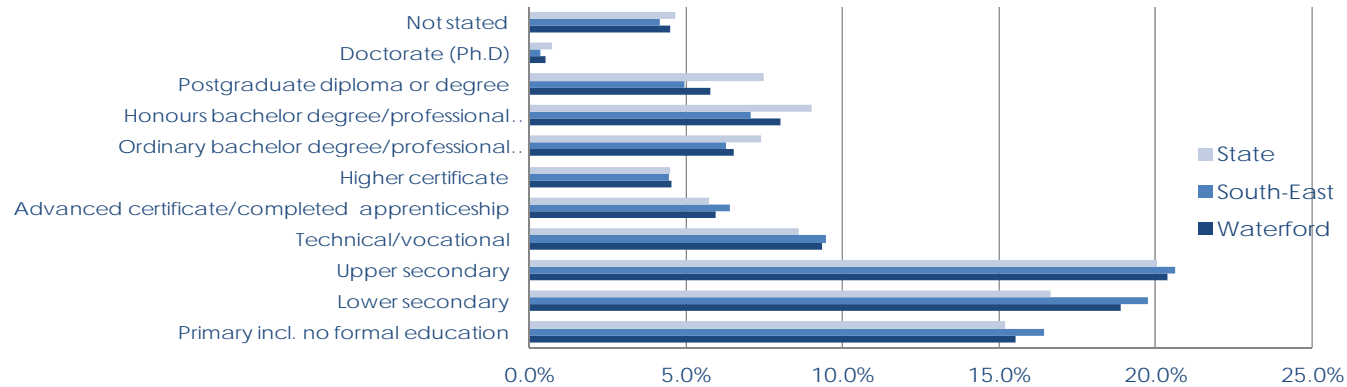
Educational Attainment



Of those aged 15 years or over whose full time education has ceased, 15.5% were educated to at most primary level; a further 54.6% attained second level while 25.4% were educated to third level. 23.4% left school aged 16 or younger. 9,873 individuals aged 15+ were still at school in April 2011 with slightly more females (5,073) compared to males (4,800) still at school.

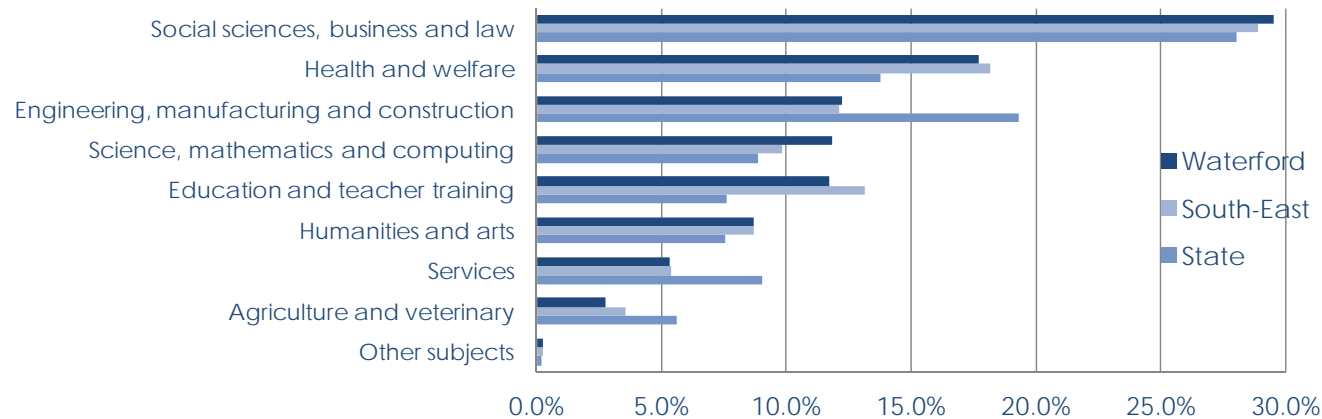
Figure 15 on the following page compares the educational attainment of Waterford with the South East and the State. In Waterford, 20.9% had a third level degree or higher compared to 24.6% for the State. Possession of a third level education is an indicator of labour force quality. A skilled and educated workforce is an essential factor in attracting inward investment. Tertiary education is also a valuable indicator of a population's earning potential. Populations with higher tertiary educational levels will have higher earning potential and, therefore, should support higher levels of economic activity. 15.5% of residents have no formal education or only primary education, while a further 18.9% have only achieved a lower secondary level of education.

Figure 15. Persons aged 15+ by highest level of educational attainment: Waterford, South East & State 2011



A new question on the main field of study of the highest qualification completed to date was asked for the first time in Census 2011. The most popular category was social sciences, business and law with 6,131 people, representing 29.5% of all respondents, followed by health and welfare with 3,678 (17.7%). Females dominated social sciences, business and law with 16.9% of all respondents and health and welfare with 14.2% of respondents.

Figure 16. Population Aged 15+ by Field of Study - Waterford, South East & State 2011



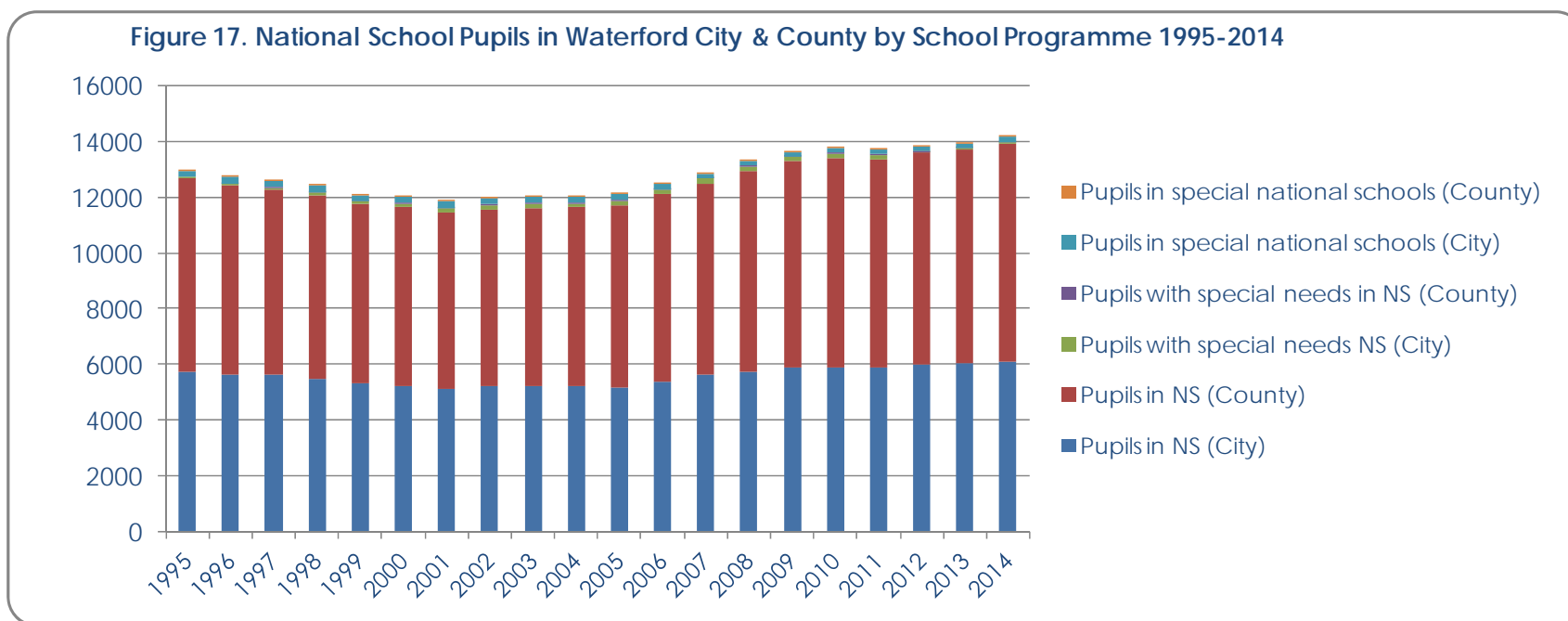
Primary School

15. Primary Schools and Enrolment Figures in Waterford for 2013-2014			
	City	County	Total
Mainstream Schools			
No. of mainstream schools	19	55	74
No. of pupils in mainstream classes	6,102	7,837	13,939
No. of classes for pupils with special needs	3	3	6
No. of pupils with special needs	27	24	61
Special Needs Schools			
No. of Special Schools	2	1	3
No. of pupils in special schools	164	50	214

Source: Department of Education & Skills 2015

Waterford is served by 77 primary schools comprising both mainstream and special schools with a total of 14,214 pupils enrolled in the 2013-2014 academic year. Figure 17 below provides a breakdown by type of school and number of pupils. Enrolments in national schools in Waterford have been gradually increasing year on year since 2003.

Table 15 shows the number of primary students registered in mainstream and special needs schools in Waterford City and County in 2014.



Source: Department of Education & Skills 2015

Secondary School

In Waterford there are 19 secondary schools serving almost 10,000 students. Table 16 provides a breakdown by type of secondary school and the number of students enrolled in the 2013-2014 academic year.

16. Number of Schools and Pupils Enrolled in Second Level Schools 2013-2014								
	Secondary		VEC		Community		Total	
	Schools	Pupils	Schools	Pupils	Schools	Pupils	Schools	Pupils
City	8	4,036	2	1,198	0	0	10	5,234
County	5	2,294	3	1,161	1	760	9	4,215
Total	13	6,330	5	2,359	1	760	19	9,449

Source: Department of Education & Skills 2015

School Drop Out Rates

In 2008 there were 1,447 first time enrolments to the first year of the junior cycle programme in second level schools in Waterford City and County. Of the 2008 entry cohort, in the city (95.53%) and county (97.67%) sat the Junior Certificate in 2011 or 2012. 88.68% in the city and 92.8% in the county sat their Leaving Certificate exams in 2013/2014.

Nationally school dropout rates have reached their lowest levels at 9.4%. Cities generally have non-completion rates above the national average with Waterford City (11.3%), Galway City (12.5%), Limerick City (13.0%), Dublin City (11.4%) and Cork City (9.8%) not doing the Leaving Certificate. Dropout rates in DEIS schools, which get extra staff and other supports due to high number of students with social disadvantage, remain higher than the national average of almost 18%, but the retention rate in DEIS schools is up on previous years.

17. School Drop Out Rates based on 2008 intake			
	1 st years in 2008	Left before Junior Cert	Left before Leaving Cert
Waterford City	760	4.5%	11.3%
Waterford County	687	2.3%	7.1%
State	56,075	3.1%	9.4%

Source: Department of Education & Skills (2015)

Third Level Education

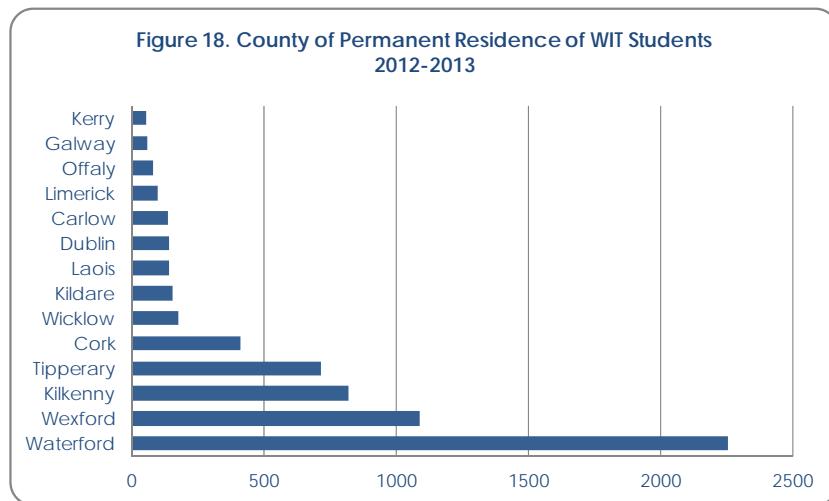
Of the 4,415 students from Waterford attending a HEA institution the 2012-2013 academic year, the majority (60.4%) are attending an Institute of Technology and a further 36% are attending a University. Table 18 shows the breakdown by institution and for the 2012-2013 academic year.

18. Full time students resident in Waterford by HEA Institution 2012-2013			
	Male	Female	Total
University	738	860	1,598
College	31	119	150
Institute of Technology	1,467	1,200	2,667
Total	2,236	2,179	4,415

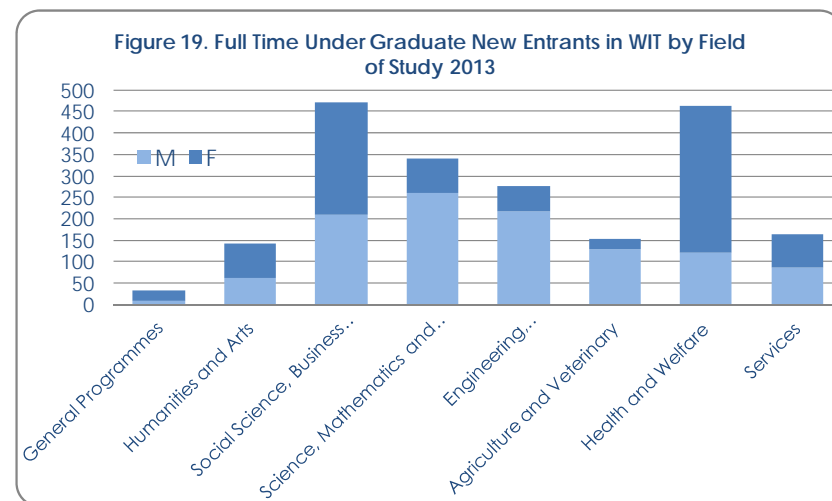
Source: HEA 2015

Waterford Institute of Technology

In terms of third level education, Waterford is an important centre in the South East region. WIT has an excellent national and international reputation and is an important contributor to Waterford and the Region through both direct and indirect employment. In 2015, WIT had 10,000 full time and part time students and 1,000 staff. Based on the 2012-2013 figures there were 6,541 Irish domiciled full time students attending Waterford Institute of Technology. Of these 2,256 (34.5%) were from Waterford. Of the 2,045 new under graduates in WIT in 2013, 23% were studying 'Social science, business and law', and a further 22.7% were studying 'Health & Welfare'. The next most popular field of study is 'Science, Mathematics and Computing' with 16.7% undertaking study in this area.



Source: HEA 2015



WIT: Research & Development

In 2013-2014, WIT expended €20.5m in research. €113.1m was secured in research funding awards (Figure 20) and 87 new research projects were funded. WIT works proactively with researchers and industry partners supporting the development of new technologies, products and processes resulting in:

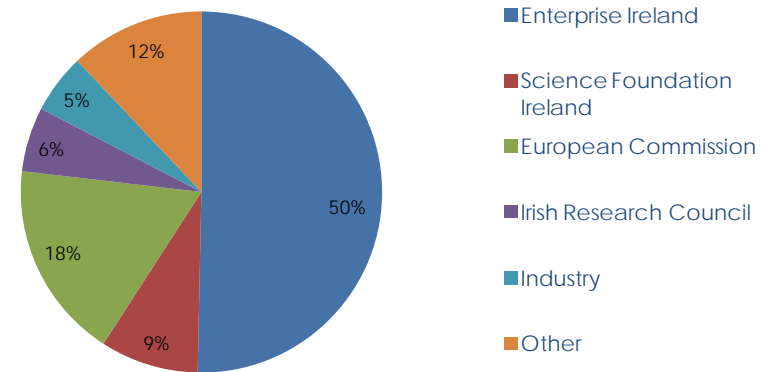
- ◆ 5 licences
- ◆ 16 invention disclosures
- ◆ 6 patent filings
- ◆ 59 innovation vouchers completed
- ◆ 9 innovation partnerships initiated
- ◆ 8 spin out companies between 2007 and 2013
- ◆ 23 client companies in ArcLabs in Waterford and Kilkenny
- ◆ 128 staff employed by ArcLabs client companies

Travel Patterns

There were three questions relating to travel to work, school or college namely means of travel, time of departure and journey time in minutes. The majority of workers commute as either a car driver (66.2%) or a car passenger (5.2%). 693 of workers commuted by bus, minibus or coach as their method of travel. 9.7% (4,022) of workers walked to work. The average journey time was 21 minutes with city residents having a shorter commuting time of 18 minutes compared to an average of 24 minutes in the county. 14.9% of workers faced a commuting time in excess of 30 minutes.

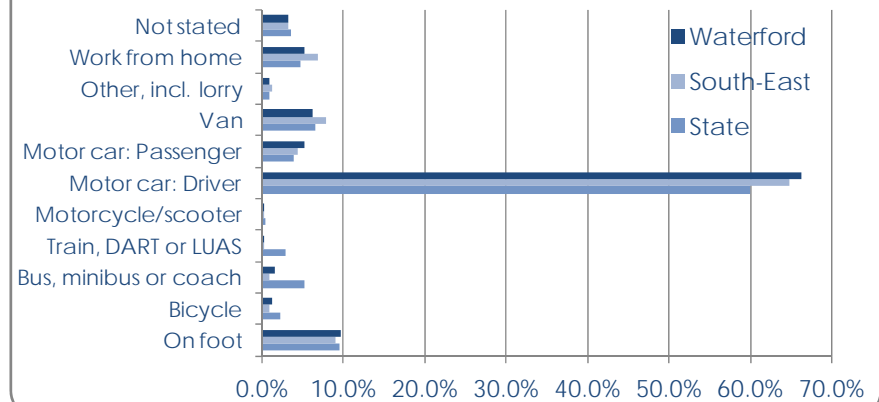
Ownership of one car (41.8%) is most common, closely followed by having two cars (38.0%). 18.5% of all households do not own any car.

Figure 20. WIT Research Funding by Agency 2013-2014

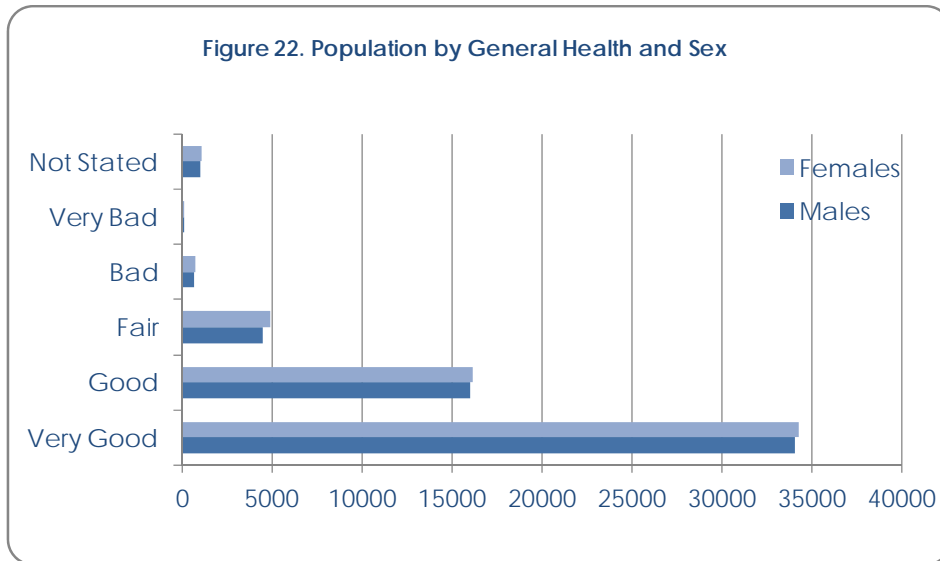


Source: WIT 2015

Figure 21. Population aged 15+ and at Work by Means of Travel to Work Waterford, South East & State 2011



Health & Well Being



A new question on general health was introduced for the first time in Census 2011 and asked respondents to select one of five categories ranging from very good to very bad. 100,532 persons stated they were in Very Good or Good health, representing 88.3% of total persons and is in line with the national figures. Only 1.5% perceived their health as bad or very bad which compares with 1.5% nationally.

There was a slight difference between the city and the county in terms of health. 86.6% in the city stated that they were in Very Good or Good health compared to 89.6% in the county. 1.9% of city residents stated they were in Bad or Very Bad health compared to 1.2% in the county.

Kavanagh Foley Index of Well Being⁴

The Kavanagh Foley Index of Well Being (KFIW) is based on the general health questions asked in the Census. The national KFIW score mean is 149.92 with a range nationally from 51.74 to 260.92. Areas with the poorest (i.e. highest) index scores are found in a heterogeneous set of locations which range from inner city to remote rural areas. Waterford City has a score of 154.97 compared to a score of 147.51 for Waterford County.

Disability

19. Persons with a disability by Age Group 2011					
	No with a Disability	Population	% Waterford	% South East	% State
Age 0-14	1,256	24,580	5.1%	9.0%	8.9%
Age 15-24	1,091	13,946	7.8%	7.2%	7.5%
Age 25-44	2,961	33,520	8.8%	18.8%	20.2%
Age 45-64	4,695	26,970	17.4%	30.1%	29.1%
Age 65+	5,632	14,779	38.1%	35.0%	34.3%
Waterford	15,635	113,795			

⁴ The KFIW score is calculated by weighting the percentage answering each of the five categories in the health questions in the Census.

A total of 15,635 people reported having a disability in April 2011, accounting for 13.7% of the population in Waterford. The rates of disability increased with age, with 5,632 or 36% aged 65 years or over of the total having a disability.

Carers

20. Carers by sex and number of unpaid hours per week 2011			
	Males	Females	Total
1-14 hours (up to 2 hours a day)	889	1,230	2,119
15-28 hours	285	508	793
29-42 hours	132	243	375
43+ hours	314	634	948
Not Stated	252	336	588
Waterford	1,872	2,951	4,823

Table 20 shows the number of men and women who were carers and the number of hours per week spent caring. 4,823 persons provided regular unpaid personal help for a friend or family member with a long term illness, health problem or disability. 19.7% of these provided care for more than six hours per day.

Affluence & Deprivation

Explanatory Note for Understanding Deprivation Indices

The Pobal HP Index⁵ (HP Index) shows the level of overall affluence and deprivation at small areas, EDs, City/County, Regional and National level based on the Census of Population 1991-2011. The measurement of affluence and deprivation is an effective method of assessing economic performance, with those areas featuring high levels of affluence viewed as being successful in comparison with those which feature high levels of deprivation.

Comparing the relative changes in the HP Index Scores between 2006 and 2011 shows that Ireland as a whole has seen a decline in the Absolute HP Index Score by 6.6 points. Overall the South East is the second most disadvantaged region of Ireland and Waterford City is the second most disadvantaged area within the region.

The Absolute Index Scores measure the actual affluence/deprivation of each area on a single fixed scale. As the economy entered into a prolonged and severe recession over the past five years, the Absolute Index Scores for most areas have increased significantly. Because affluence/deprivation is measured on a fixed scale, it is possible to use the Absolute Index Scores to quantify these changes across the census periods. The Absolute Index Scores range between roughly -40 (most disadvantaged) and +40 (most affluent).

The Relative Index Score is useful in helping target resources towards disadvantaged areas as it gives the relative position of each area at a specific point in time. It is also useful if making a statement about a particular area at a particular time (e.g. 2011) where the appropriate score to use is the 2011 Relative Index Score which can be described using the labels in Table 21 on the following page.

⁵ The new HP Index replaces all previously published data.

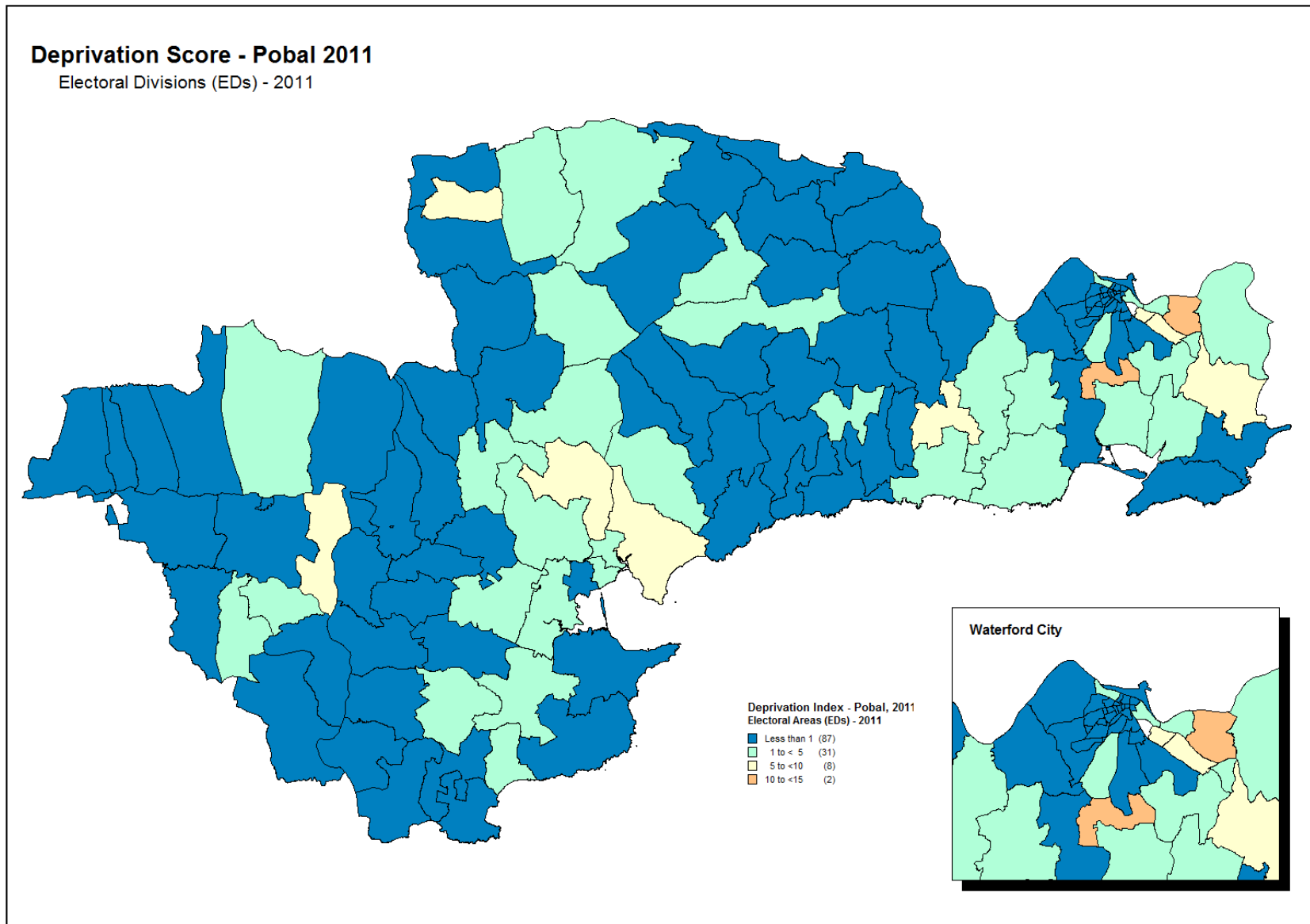
21. Distribution and Labels of Relative Index Score	
Relative Index Score	Label
Over 30	Extremely Affluent
20 to 30	Very Affluent
10 to 20	Affluent
0 to 10	Marginally Above Average
0 to -10	Marginally Below Average
-10 to -20	Disadvantaged
-20 to -30	Very Disadvantaged
Below -30	Extremely Disadvantaged

22. Absolute and Relative HP Index Scores 2006 & 2011						
	2006 Absolute HP Index Score	Change in Absolute HP Index Score	2011 Absolute HP Index Score	2006 Relative HP Index Score	2011 Relative HP Index Score	Change in Relative HP Index Score
Waterford City	-5.7	-11.5	-5.8	-5.7	-4.5	1.2
County Waterford	-1.1	-8.1	-7.0	-1.1	-1.1	0
South East	-2.9	-10.2	-7.3	-2.9	-3.2	-0.3
Ireland	-0.2	-6.8	-6.5	-0.2	0.2	0.5

Source: www.pobal.ie

Table 22 shows the Absolute and Relative HP Index Scores for Waterford City, County Waterford and Ireland. Individual scores for each ED within Waterford can be found in their respective Local Electoral Area profile.

In Waterford County, Mocollop and Gortnapeaky had the lowest Absolute HP Index in 2011 at -15.5 and -15.2 respectively. Waterford City comprises a wide spectrum with regard to deprivation. Of the 37 EDs in Waterford City, most (29) are on the disadvantaged side of the spectrum. The most disadvantaged EDs are Larchville (-22.1) and Lisduggan (-21.5). The most affluent EDs in Waterford City are Ballymacloide (11.0) and Farranshoneen (8.5) and in Waterford County, Kilbarry.



Economic Activity

Introduction

The City of Waterford is the fifth largest City within the Republic of Ireland and is the primary population and economic centre within County Waterford as well as the South East region. Waterford City is also designated as a Gateway City under the current National Spatial Strategy.

Employment and Labour Force

Explanatory Note for Measuring Unemployment

There are a number of different methods for measuring unemployment.

Quarterly National Household Survey

The official measure of unemployment is provided by the Quarterly National Household Survey (QNHS) produced by the CSO. The QNHS uses the International Labour Organisation (ILO) Method. To be classified as 'unemployed' a person must be simultaneously be:

- i. without work,
- ii. actively seeking work,
- iii. available to take up a job.

A person is classified as 'employed' if they have worked more than one hour for pay or profit or in a family business. The QNHS is not available at City or ED level only at regional level i.e. South East.

Census

The Census figures use the Principal Economic Status (PES) Method. Respondents are asked 'What is your usual situation with regard to employment?'. Individuals classify themselves as either: At Work, Unemployed, Student, Home Duties, Retired, Unable to Work or Other. Census figures do not provide the official unemployment rate.

Live Register

The Live Register is not designed to measure unemployment. It includes part time workers (those who work up to three days a week), seasonal and casual workers entitled to Jobseeker's Benefit or Allowance. The Live Register can provide a trend indicator of unemployment.

The Live Register includes people who would not be recorded as unemployed according to the ILO definition i.e. part time, casual, no longer actively seeking work. A further shortcoming of the Live Register for the purposes of measuring unemployment is that the geographic areas served by the Department of Social Protection offices do not align with the boundaries of either Waterford City or Dungarvan. Waterford City Live Register figures include those in a 15-mile radius around Waterford City and its environs, including towns such as Lismore, Cappoquin, Ballyduff, Tallow, Kilmeaden and Mullinavat. Dungarvan extends eastwards to include Kilmacthomas and Stradbally, to the north/northeast it includes Kilbrien, Cappagh and west to Clashmore. The following areas are served by other offices: Ballymacarbry (Clonmel), Ardmore and Kinsalebeg (Youghal), Portlaw, Rathgormack and Clonea Power (Carrick on Suir).

The table on the following page highlights the different figures that each method of measuring unemployment provides for the period of the Census i.e. April 2011 and reinforces the point that direct comparison across the different methodologies of measuring unemployment is not possible.

Method	Period	Geographic Area	Frequency	%Unemployed	Number Unemployed
Census 2011	April 2011	Small Area	Every four years		
		Electoral Division	Every four years		
		Waterford City	Every four years	25.1%	5,616
		Waterford County	Every four years	19.1%	5,956
		Waterford City & County	Every four years	21.6%	11,572
		South East	Every four years	21.9%	47,338
		State	Every four years	19.0%	424,843
Live Register	April 2011	Waterford City Office	Monthly	N/A	11,718
		Dungarvan Office	Monthly	N/A	2,417
		Waterford City & Dungarvan	Monthly	N/A	14,135
QNHS	Q2 2011	South East	Quarterly	18.7%	42,300
	Q2 2011	State	Quarterly	14.6%	317,400

Economic Status

23. Persons aged 15 and over by economic status 2011			
	Males	Females	Total
At work	22,029	19,913	41,942
Looking for first job	520	370	890
Unemployed	7,062	3,620	10,682
Total in Labour Force	29,611	23,903	53,514
Labour Force Participation Rate ⁶	67.5%	52.7%	60.0%
Unemployment Rate ⁷	25.6%	16.7%	21.6%
Student	4,800	5,073	9,873
Look after home/family	396	8,126	8,522
Retired	6,766	6,106	12,872
Unable to work due to sickness or disability	2,160	1,943	4,103
Other	145	186	331
Total not in Labour Force	14,267	21,434	35,701
Waterford	43,878	45,337	89,215

⁶ Labour force participation measures the percentage of all people aged 15 or over who are available to work, that is either 'at work' or 'unemployed'. The national labour force participation rate was 61.9%.

⁷ The unemployment rate on the principal economic status basis measures the percentage of people in the labour force who were either looking for their first job or unemployed. Nationally the unemployment rate was 19.0%.

Waterford Baseline

The unemployment rate based on the Principal Economic Status (PES) was calculated at 21.6% compared with a national rate of 19.0%. The unemployment rate for males was higher at 25.6% than females at 16.7%. The unemployment rate in Waterford City at 25.1% was also significantly higher than Waterford County at 19.1%.

Within Waterford, there are seven unemployment black spots⁸. Five of these unemployment black spots are located in Waterford City South which had the highest unemployment rate by electoral areas: Larchville (44.1%), Lisduggan (43.3%), Ballybeg North (41.9%), Roanmore (41.3%) and Mount Sion (36.9%). Two additional unemployment black spots: Newport's Square (41.1%) and The Glen (35.4%) are located in Tramore Waterford City West. Across the South East there are a further five black spots: Wexford (2), South Tipperary (2) and Carlow (1).

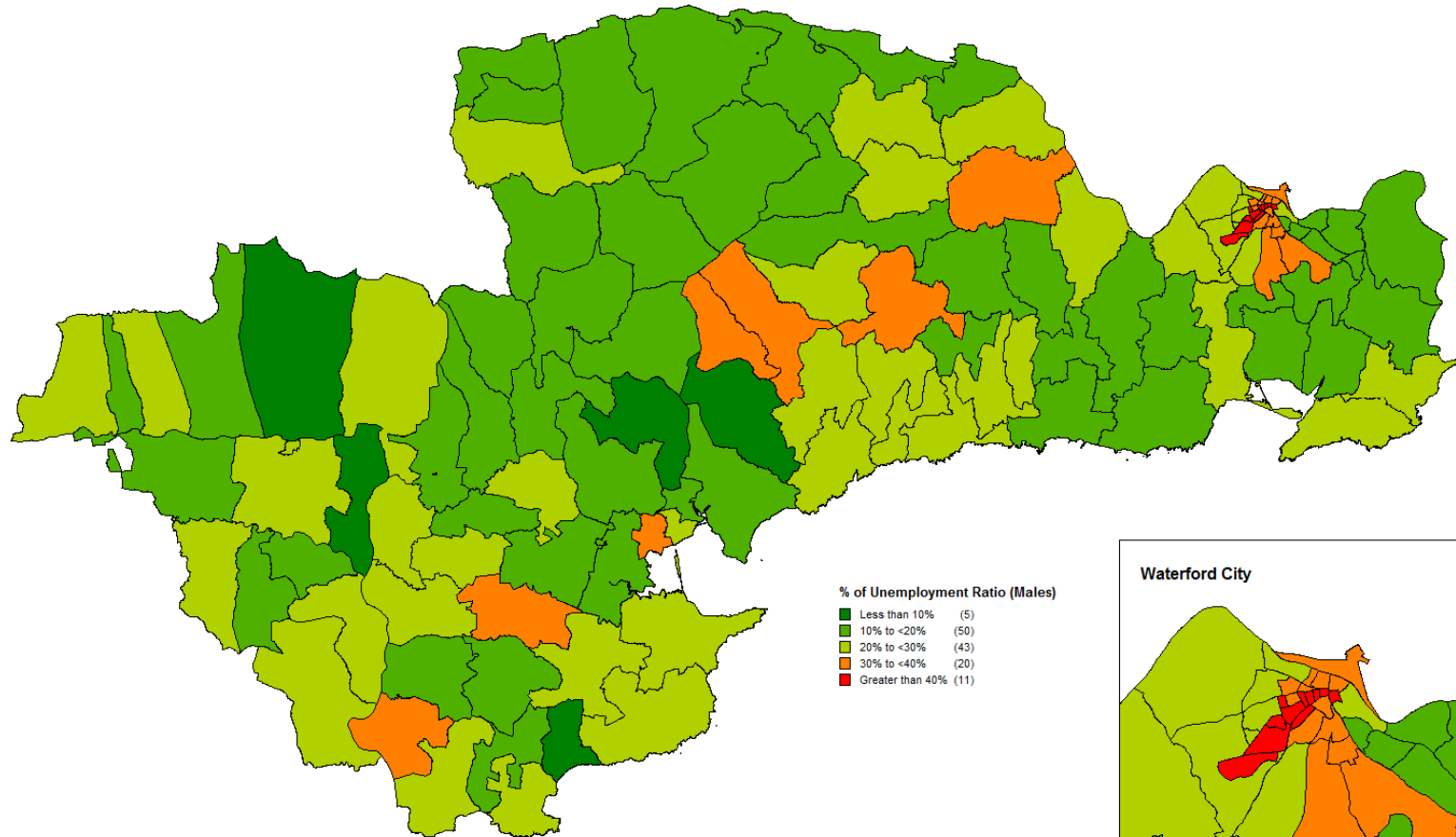
24. Persons aged 15 and over by economic status by Municipal District, South East and State 2011						
	Metropolitan District	Dungarvan Lismore	Comeragh	Waterford	South East	State
At work	23,781	10,770	7,391	41,942	183,334	
Looking for first job	563	192	135	890	3,977	
Unemployed	6,754	2,395	1,533	10,682	47,338	
Total in Labour Force	31,098	13,357	9,059	53,514	234,649	
Labour Force Participation Rate	59.7%	60.0%	60.9%	60.0%	60.5%	61.9%
Unemployment Rate	23.5%	19.4%	18.4%	21.6%	21.9%	19.0%
Student	6,120	2,231	1,522	9,873	39,297	
Look after home/family	4,677	2,212	1,633	8,522	40,289	
Retired	7,550	3,321	2,001	12,872	52,883	
Unable to work due to sickness or disability	2,444	1,061	608	4,103	19,224	
Other	210	78	42	331	1,358	
Total not in Labour Force	20,991	8,903	5,807	35,701	153,051	
Total	52,089	22,260	14,866	89,215	387,700	

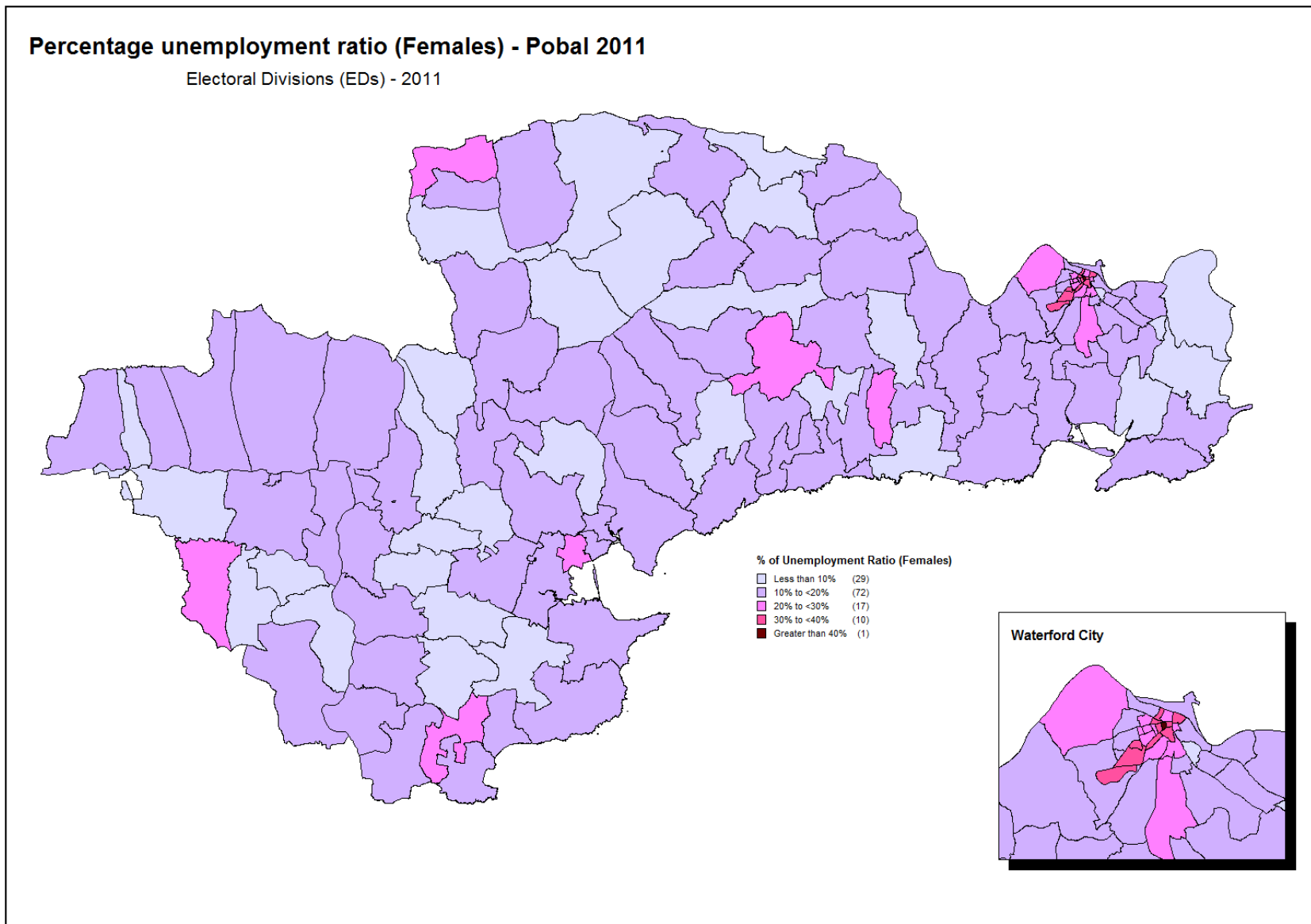
The labour force was recorded at 53,514 as at April 2011. The Labour Force Participation Rate for Males was 52.7% and for Females 52.7% indicating a lower level of economic engagement by women relative to men and that women are more detached from the labour force than men. Among the labour force, those at work accounted for 41,942, while the numbers of people looking for their first job stood at 890. The number of people who were unemployed was 10,682. When combined with people looking for their first job the total number of people out of work stood at 11,572 in April 2011. The number of people outside of the labour force, namely students, those looking after the home or family, retired persons and those unable to work due to disability made up a total of 35,701 in 2011.

⁸ An unemployment black spot is defined as an ED whose labour force exceeded 200 persons and the unemployment rate on a Principal Economic Status based exceeded 35%.

Percentage unemployment ratio (Males) - Pobal 2011

Electoral Divisions (EDs) - 2011



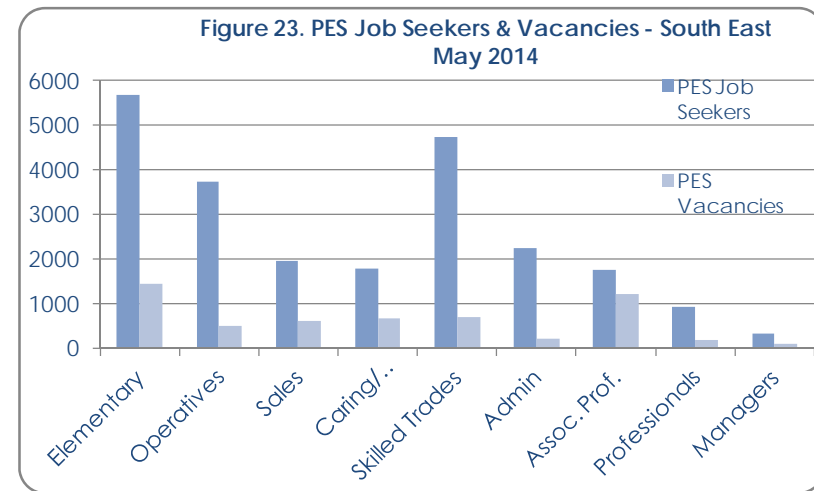


PES Job Seekers & Vacancies

In May 2014, over 23,000 job seekers were registered with the Public Employment Service (PES) in the region; the highest number of job seekers (5,674 or one quarter of the total number) had previously worked in elementary occupations (process plant, construction), one fifth in skilled trades, one in six as operatives, and one in ten in administrative occupations.

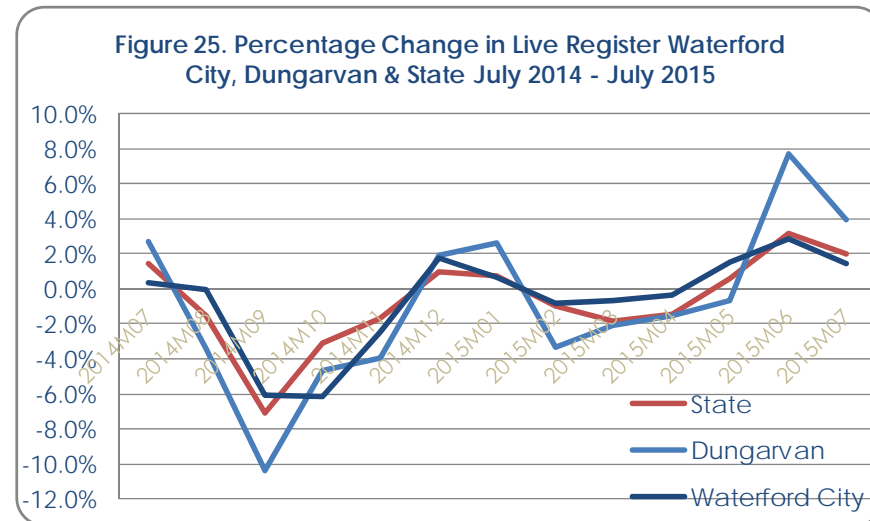
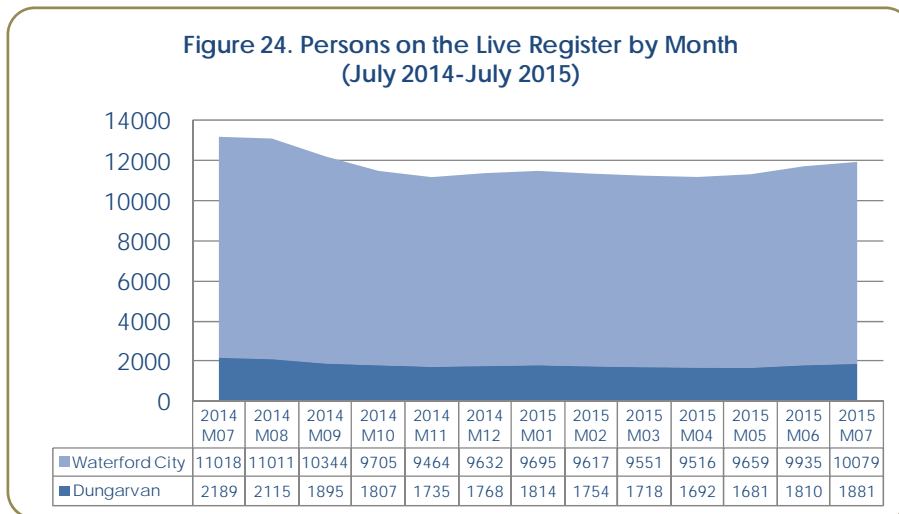
Figure 22 shows the level of job seekers in each sector compared to the number of vacancies advertised in that sector through Department of Social Protection Jobs Ireland in 2013.

Source: EGFSK Regional Labour Markets Bulletin 2014



Live Register

In July 2015, there were 10,079 signing on the Live Register in Waterford City and a further 1,881 in Dungarvan. These figures are down 9.4% on the same month in 2014 but the figures have been gradually increasing over the last couple of months which is reflected in the upward trend in the national figures over the same period. (Source: StatBank 2015)

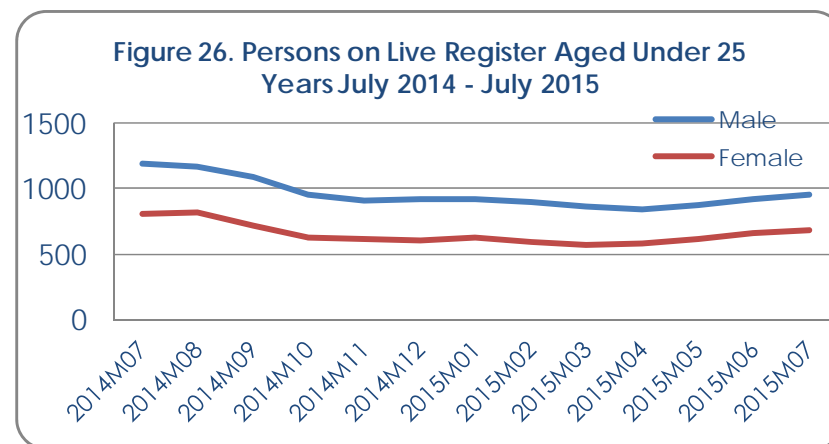


Youth Unemployment⁹

Ireland's youth unemployment rate was 21.1% in March 2015 down from 25.9% in March 2014 (Source: Eurostat).

It is not possible to measure youth unemployment at local level but an analysis of those signing on the Live Register by age gives an indication of youth unemployment.

Figure 26 shows that the numbers aged under 25 years signing on in Waterford. In July 2016, there were 1,626 aged under 25 signing on. While this figure is down on the same month in 2014 (-18.2%), it has been gradually increasing over the last couple of months. (Source: StatBank 2015)



Quarterly National Household Survey

25. Persons aged 15 years and over by NUTS 3 Regions, statistical indicator and Quarter Q1 2014-Q1 2015																	
	2011Q1	2011Q2	2011Q3	2011Q4	2012Q1	2012Q2	2012Q3	2012Q4	2013Q1	2013Q2	2013Q3	2013Q4	2014Q1	2014Q2	2014Q3	2014Q4	2015Q1
State																	
ILO Unemployment Rate (%)	14.3	14.6	15.1	14.5	15.0	15.0	15.0	13.7	13.7	13.9	13.0	11.7	12.0	11.8	11.3	9.9	9.9
ILO Participation Rate (%)	59.7	60.5	60.4	60.1	59.7	60.1	60.2	59.6	59.5	60.5	60.7	60.1	59.7	60.0	60.4	59.8	59.4
South-East																	
ILO Unemployment Rate (%)	17.4	18.7	19.2	19.2	20.1	19.0	19.4	18.8	18.4	18.3	16.6	15.5	15.7	14.3	13.7	11.9	12.8
ILO Participation Rate (%)	57.5	58.2	58.3	58.0	58.1	58.8	58.3	57.2	58.3	58.4	59.0	59.1	59.0	58.9	59.6	58.7	58.5

Source: StatBank 2015

Figures from the Quarterly National Household Survey at NUTS 3 level show a downward trend in unemployment across the South East Region but unemployment in the South East still remains at a higher level than the State at 12.8% in Q1 2015 which was an increase on the previous quarter. The ILO Participation Rate for the South East is slightly below the national figure at 58.5% compared to 59.4%; this was a slight decrease on the previous quarter which is reflected in a national decrease in the participation rate.

⁹ Persons aged 15 to 24 years

Occupation & Industry

Tables 26 and 27 provide a breakdown of the labour force by occupation and by industry. An analysis of occupations shows that the largest grouping (17.3%) are involved in skilled trade occupations. A further 14.3% are involved in 'professional occupations' which includes occupations in science, research, engineering, technology, health professional, teaching and education, business, media and public service professionals.

In terms of industry (Table 27) 24.4% work in professional services, with 21.6% in commerce and trade. An analysis by gender shows that it is primarily females working in the professional services sector, with males dominating in agriculture, forestry and fishing; building and construction; manufacturing industries.

26. Persons at work or unemployed by occupation and sex in Waterford, South East & State 2011						
	Males	Females	Total	% Waterford	% South East	State
Managers, Directors and Senior Officials	2,450	1,364	3,814	7.2%	7.3%	7.8%
Professional Occupations	3,138	4,388	7,526	14.3%	13.1%	16.1%
Associate Professional and Technical Occupations	2,795	1,938	4,733	9.0%	8.5%	10.5%
Administrative and Secretarial Occupations	734	3,855	4,589	8.7%	8.8%	10.3%
Skilled Trades Occupations	8,209	907	9,116	17.3%	19.9%	15.8%
Caring, Leisure and Other Service Occupations	505	2,806	3,311	6.3%	6.8%	6.6%
Sales and Customer Service Occupations	1,312	2,946	4,258	8.1%	7.4%	7.1%
Process, Plant and Machine Operatives	3,979	1,069	5,048	9.6%	9.3%	7.6%
Elementary Occupations	3,190	2,106	5,296	10.1%	10.2%	9.2%
Not Stated	2,779	2,154	4,933	9.4%	8.7%	9.0%
Waterford	29,091	23,533	52,624			

27. Persons at work by industry in Waterford and South East 2011					
	Males	Females	Total	% Waterford	% South East
Agriculture, forestry and fishing	2,277	283	2,560	6.1%	8.5%
Building and construction	1,722	164	1,886	4.5%	5.5%
Manufacturing industries	4,877	2,113	6,990	16.7%	13.8%
Commerce and trade	4,257	4,803	9,060	21.6%	23.2%
Transport and communications	1,885	696	2,581	6.2%	5.3%
Public administration	1,171	967	2,138	5.1%	5.6%
Professional services	2,785	7,430	10,215	24.4%	22.9%
Other	3,055	3,457	6,512	15.5%	15.2%
Waterford	22,029	19,913	41,942		

Place of Work

POWSCAR data provides information on areas which have been most active in the provision of employment and have played an important role in attracting people to work in the region. It also reveals the extent to which people are leaving Waterford to work.

Waterford City was the fifth largest location for employment in the State in 2011. Of the 41,942 workers resident in Waterford, 12,196 worked outside the area. The daytime working population (resident and non-resident) of Waterford was 36,178.

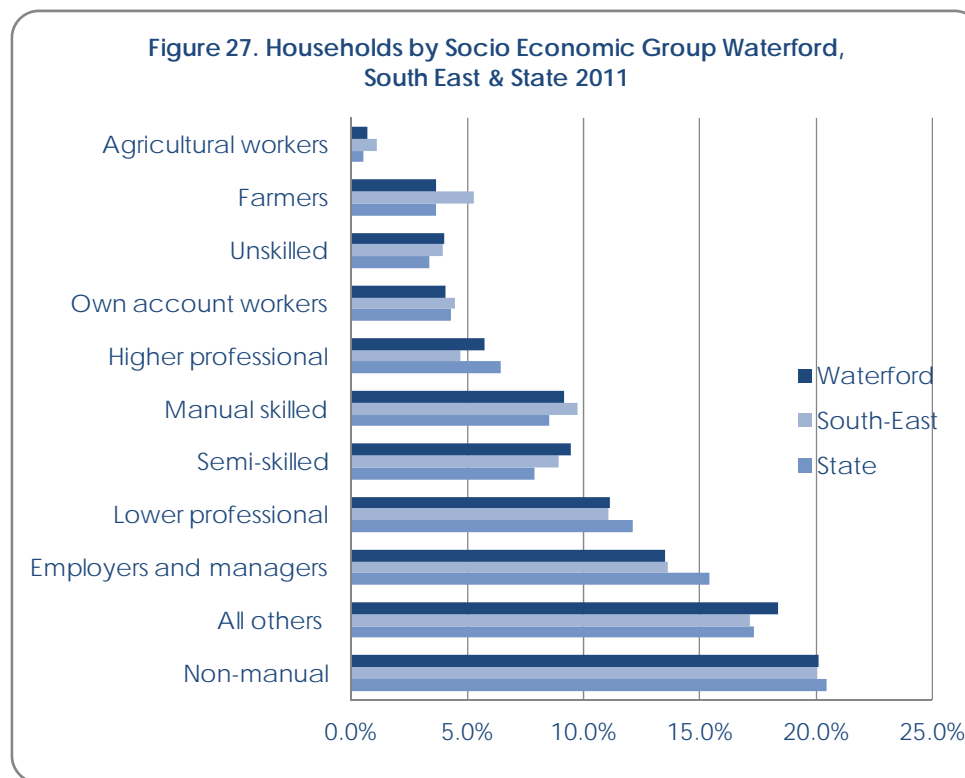
Of the 15,692 workers residing in the city, 3,006 had jobs elsewhere. A total of 10,646 workers commuted into the city and suburbs, bringing the working population of Waterford City and suburbs to 23,332.

A total of 5,573 (52%) of the 10,646 commuting into the city lived in Waterford County. The town of Tramore (1,701) contributed the most workers to Waterford, while Dunmore East (265), Portlaw (237) and Passage East (147) were the next largest feeder towns for the City. Kilkenny and Wexford were the places of residence for 2,827 and 1,066 workers respectively.

The private car remains the most popular choice of transport for travelling to work accounting for 92% of persons travelling into Waterford for work, with an average travel time of 30 minutes, the shortest journey time of the five cities. There was limited use of public transport and green modes of transport such as walking and cycling. The most popular departure time was between 8.01am and 8.30am accounting for 23% of departures.

Socio Economic Status¹⁰

In the Census the population is classified into one of ten specific socio economic groups. The classification aims to bring together persons with similar social and economic statuses on the basis of skill or educational attainment. Figure 27 shows the composition of households by socio economic group for Waterford compared to the South East and the State. The largest grouping in Waterford is non-manual with 20.1% of households falling into this category, followed by Employers & Managers with 13.5%. Farmers and Agricultural workers accounted for 4.4%.



¹⁰ Socio economic grouping classifies the entire population into one of ten categories based on the level of skill and educational attainment of their occupation (those at work, unemployed or retired) while all other people are classified to the socio economic group of the person in the family on whom they are deemed dependant.

Business Demography

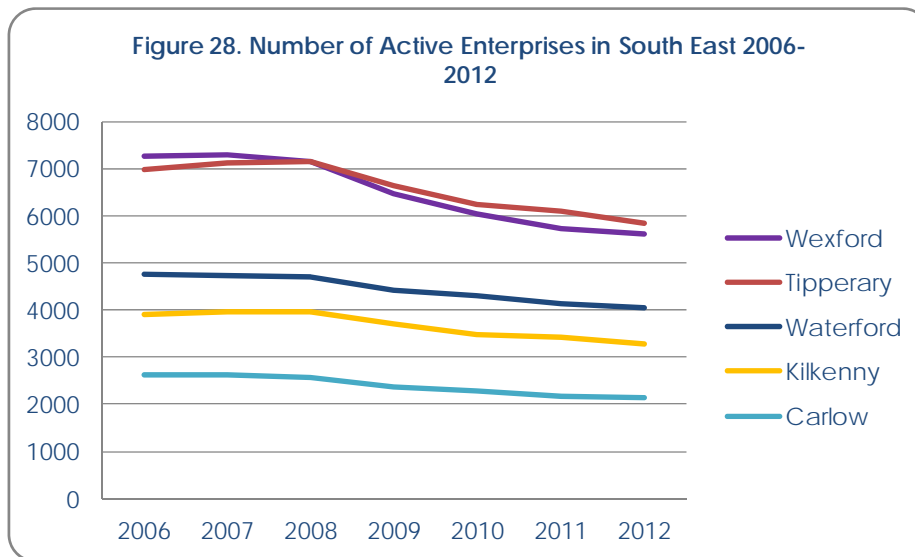
Explanatory Note

The CSO's Business Demography data provides statistics on enterprises in the private business economy. It provides data on the number of active enterprises by size and by sector and also data on the number of persons employed by these. Business demography data is based on enterprises that are registered with the Revenue Commissioners as active in the year. It focuses on private businesses and does not include enterprises in health, public administration or agriculture. Totals may not be exact as some data has been suppressed to protect the confidentiality of individual enterprises.

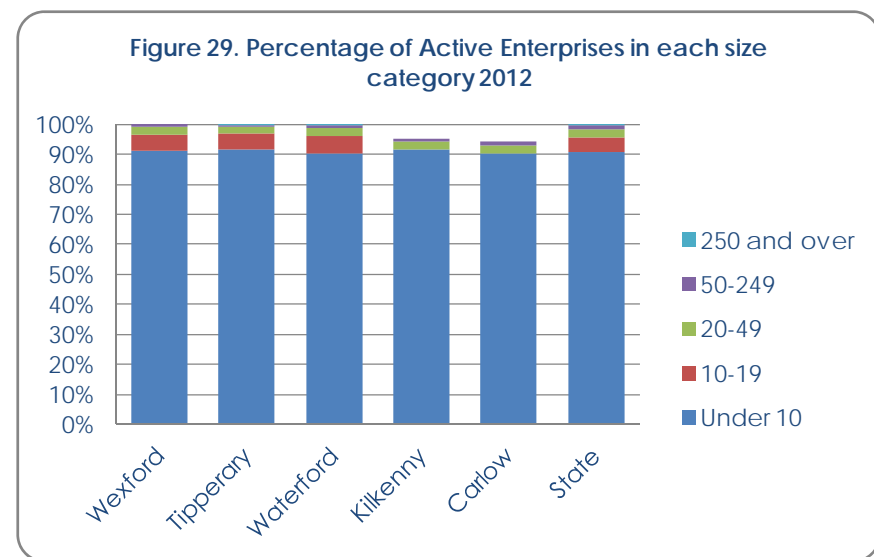
The geographical breakdown of Business Demography data is an approximation. An enterprise is allocated to a county based on the address at which it is registered for Revenue purposes. Where an enterprise has local units in several counties, but one head office, it will only be counted where its head office is located. The figures therefore underestimate the number of enterprises actually operating in counties. The figures however, do present a good picture of the real enterprise base as they measure enterprises registered in the county and provide an indication of trends comparable to other areas. In the case of foreign owned multi nationals, if they are registered with Revenue in Ireland they are included in the county where their Irish head office is based.

The data collection methodology creates some issues for Waterford given that for example Waterford's largest employer is in the health sector (University Hospital Waterford) and that a large percentage of Waterford's largest employers are multinationals and as such may not be captured in this data if their Irish head office is not located in Waterford.

Enterprises in the South East Region & Waterford



Source: CSO (2014) Business Demography



Waterford Baseline

In 2012, there were 4,041 active enterprises in Waterford and 20,892 across the South East region. Waterford and the counties of the South East have experienced a continuing decline in the number of enterprises from a high of 25,508 in 2006 to 20,892 in 2012; representing a decline of 18.1% across the South East. Waterford experienced a 14.9% decline over the same period; the lowest decrease across the South East. Nationally, the decline in active enterprises commenced in 2009 and since then the number of active enterprises has declined by 12.5%. In total, 12.0% of all enterprises in the state are located in the South East region with 2.2% based in Waterford.

Enterprise by Size

28. Employees (Number) in Waterford by Activity - 2006 & 2012		
	2006	2012
Manufacturing	9,444	8,091
Water supply, sewerage, etc	58	57
Construction	4,696	1,414
Wholesale and retail trade	6,511	4,475
Transportation and storage	801	812
Accommodation and food service activities	3,752	2,969
Information and communication	792	883
Financial and insurance activities	304	300
Real estate activities	194	224
Professional, scientific and technical activities	1,529	1,123
Administrative and support service activities	2,307	2,038
Education	1,955	2,402
ICT	727	763
Total	30,404	22,398

Source: CSO (2014) Business Demography

The vast majority of enterprises in Waterford and the South East are micro enterprises employing fewer than 10 people. In Waterford, 90.1% of all enterprises are micro enterprises; this is slightly lower than the percentage in the other south east counties. While micro enterprises make up the majority in terms of enterprise size, they only account for 23% (5,170) of employees.

In contrast companies with 50-249 employees represent 1% of companies but 17% (3,826) of employees and companies with 250+ employees of which there are 15 or 0.4% represent 32% (7,193) of employees.

While companies employing 50 or more employ the highest number of employees, larger companies have also experienced a significant decrease in employees from a high of 15,605 in 2007 to 11,019 in 2012; a reduction of almost 30%.

While an analysis by sector shows that the largest percentage (46.2%) are in Wholesale & Retail Trade, an analysis of employee numbers shows that Manufacturing employs the greatest number (36%) compared to 20% in Wholesale & Retail.

Enterprises by Sector

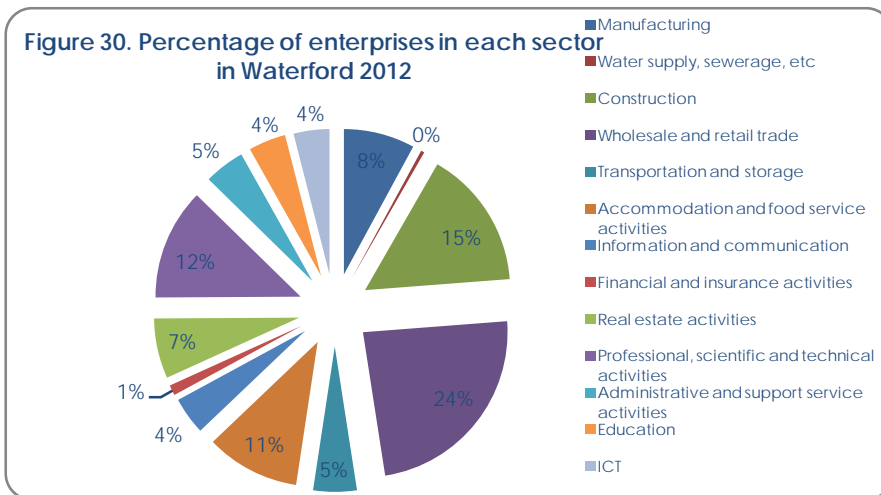
29. Active Enterprise by Sector in Waterford 2006-2012								
	2006	2007	2008	2009	2010	2011	2012	% Change 06-12
Manufacturing	364	352	354	341	343	329	348	-4.4%
Water supply, sewerage, etc	15	15	14	16	18	18	17	13.3%
Construction	1,264	1,267	1,144	931	834	736	680	-46.2%
Wholesale and retail trade	1,089	1,094	1,102	1,066	1,062	1,047	1,044	-4.1%
Transportation and storage	273	273	259	241	234	225	213	-22.0%
Accommodation and food service activities	467	450	483	492	496	478	461	-1.3%
Information and communication	150	143	158	161	175	176	184	22.7%
Financial and insurance activities	54	60	59	53	54	49	50	-7.4%
Real estate activities	241	253	260	283	282	283	294	22.0%
Professional, scientific and technical activities	567	566	591	581	575	556	545	-3.9%
Administrative and support service activities	256	253	261	245	236	221	199	-22.3%
Education	102	106	113	165	167	172	183	79.4%
ICT	142	139	156	165	176	172	175	23.2%
Total	4,748	4,734	4,694	4,419	4,319	4,123	4,041	

Source: CSO (2014) Business Demography

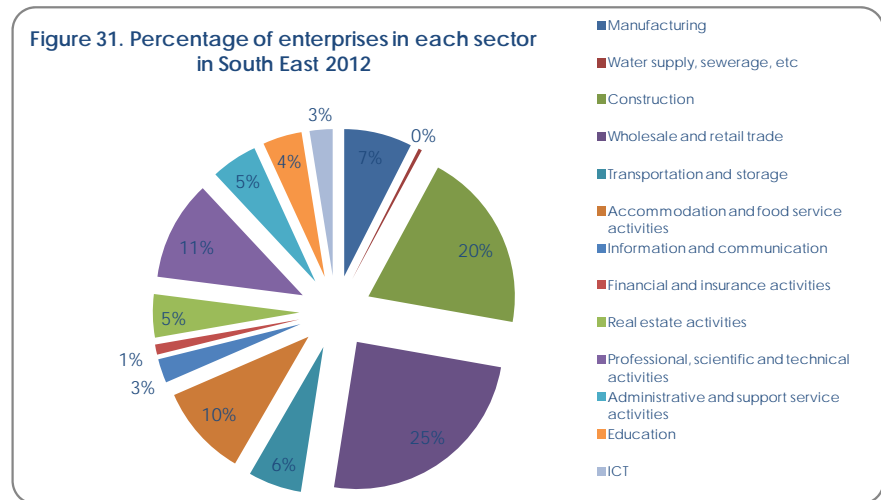
Figures 30 and 31 on the following page show the percentage breakdown of enterprises by sector for Waterford and the South East. Within Waterford, Wholesale/ Retail is the dominant sector with 1,044 enterprises and this figure has remained relatively constant since 2006 (Table 29). While Construction is the second largest sector with 680 enterprises it is also the sector which has, not surprisingly, witnessed the largest decrease since 2006 and is down by 46.2%. Some sectors in Waterford have experienced an increase, although numerically the increases are low and include: Education, ICT, Information & Communications and Real Estate.

The comparison of the sectoral composition of Waterford enterprises to the South East shows a very similar structure as evidenced in Figures 30 and 31. The enterprise profile of Waterford differs slightly from the State. Waterford has a higher percentage in Wholesale & Retail (23.8% compared to 21.2%) and in Accommodation & Food Service (10.5% compared to 8.2%), demonstrating the importance of both retail and tourism to the local economy.

Waterford also continues to have a higher percentage in Manufacturing (7.9%) compared to both the South East region (7.5%) and the State (6.0%). Waterford has a lower percentage of enterprises in knowledge intensive sectors with 12.4% in Professional, Scientific & Technical activities compared to 15.2% for the State and Financial & Insurance Activities (1.1% compared to 2.8%). Waterford does compare favourably under ICT with 4.0% compared to 4.7% for the State and only 2.5% for the South East.



Source: CSO (2014) Business Demography



High Potential Start Ups

30. Regional Distribution HPSU ¹¹ & Competitive Start Fund Companies 2014		
Region	HPSU	CSF
Dublin	58	49
Mid East (Kildare, Meath, Wicklow)	6	4
South & South East (Cork, Carlow, Kilkenny, Waterford, Wexford, Tipperary South)	18	11
Border (Cavan, Donegal, Leitrim, Louth, Monaghan, Sligo)	5	3
West (Galway, Mayo, Roscommon)	5	5
Mid-West (Clare, Kerry, Limerick, Tipperary North)	9	6
Midlands (Laois, Longford, Offaly, Westmeath)	1	3
Total	102	81

Source: Enterprise Ireland 2015

¹¹ A 'high potential start up' (HPSU) is defined as a company that is: Based on technological innovation, Likely to achieve significant growth in 3 years (Sales of €1m per annum and employment of 10), Export oriented, Led by an experienced team, with a mixture of technical and commercial competencies.

Vacancy Rates¹²

Data produced by GeoDirectory shows the vacancy rates in commercial properties. Figures for Waterford show a slight decrease in vacancy rate in percentage terms. In Q1 2013, nationally there were 223,451 commercial address points of which 3.0% (6,703) were in Waterford. By Q2 2015 there were 224,168 commercial address points nationally of which 2.7% (6,052) were in Waterford.

31. Commercial Vacancy Rates (%) by County Q1 2013 – Q2 2015									
	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q2 2015
Waterford	12.0	12.0	12.6	12.3	13.2	13.3	13.6	13.4	13.2
Carlow	13.0	13.2	13.4	13.3	13.1	13.2	13.0	13.1	12.1
Tipperary	10.0	10.6	10.8	10.7	11.4	11.7	11.9	11.9	11.7
Kilkenny	10.0	10.5	11.0	10.7	11.3	11.3	11.3	11.1	11.0
Wexford	9.0	9.7	9.7	9.5	9.8	10.0	9.8	9.9	10.0
Galway	13.0	13.8	14.1	13.7	14.6	14.8	15.1	15.2	15.4
Limerick	13.0	13.1	13.7	13.4	13.8	13.9	14.3	15.0	15.0
Cork	10.0	11.0	11.5	11.1	11.4	11.5	11.5	11.6	11.3
Dublin	13.0	13.5	14.0	13.5	13.8	13.7	13.7	13.8	13.4
State	11.4	11.9	12.3	12.4	12.4	12.6	12.7	12.8	12.6

Source: GeoDirectory 2015

County Incomes and Regional GDP

An important indicator of economic activity is Gross Value Added (GVA), which is equivalent to Gross Domestic Product (GDP) and is a useful proxy for GDP. GVA is a calculation of goods and services generated in a region minus the costs of the materials and services used in their creation which were brought from outside the area. GVA is an accepted measure of regional development. Data relating to GVA is only available at regional level and a further limitation of GVA is that it reflects where income is generated rather than the residence of those generating the income.

Income per capita is based on where people live and is therefore a good comparator of socio economic well being across regions and is also available at county level. The data at regional level is more accurate than county data which are indicative of relative trends rather than accurate absolute figures. For that reason, much of the analysis will focus on the regional data.

¹² The GeoDirectory database distinguishes between an address point which is a 'unit' as opposed to a 'building' which can comprise one or more units. The term 'address point' is used in the GeoDirectory Report as a proxy for each unit. All non-residential address points are classified as commercial address points. Units classified as Residential, Agricultural, Forestry, Fishing and Extraterritorial Organisations and Bodies (e.g. Embassies) are excluded.

32. Key County Incomes for South East and State 2012							
Statistic	Carlow	Kilkenny	South Tipperary	Waterford	Wexford	South East	State
Disposable Income per person	€18,670	€17,641	€18,202	€18,610	€17,695	€18,090	€19,468
% of state average disposable income per person	95.9	90.6	93.5	95.6	90.9	92.9	100
Change in disposable income per person 2011-2012	-0.3%	-0.4%	-2.0%	0.0%	-0.4%	-0.6%	0.8%

Source: CSO (2015) County Incomes and Regional GDP

33. Regional GDP Statistics for NUTS II & NUTS 3 Region 2012											
Gross Value Added	South East	South West	Dublin	Mid East	Mid West	S&E	Border	Midland	West	BMW	State
GVA Per Person	€23,588	€44,391	€51,839	€22,863	€27,464	€38,789	€19,016	€18,638	€28,256	€22,242	€34,308
% of State average GVA per person	68.8	129.4	151.1	66.6	80.1	113.1	55.4	54.3	82.4	64.8	100.0
% of EU28 average GVA per person	89.4	168.2	196.4	86.6	104.1	147.0	72.1	70.6	107.1	84.3	130.0
% of total national GVA	7.5%	18.7%	41.9%	7.7%	6.6%	82.4%	6.2%	3.3%	8.0%	17.6%	€157,481
Contribution to GVA from:											
Agriculture, forestry and fishing	19.9%	26.0%	4.1%	9.3%	10.4%	69.7%	14.1%	6.2%	10.0%	30.4%	€2,388
Manufacturing and construction	8.5%	35.8%	19.7%	7.7%	7.5%	79.1%	6.5%	2.5%	11.9%	20.9%	€43,022
Market and non-market services	6.8%	12.2%	51.1%	7.7%	6.2%	84.0%	5.9%	3.6%	6.5%	16.1%	€113,798

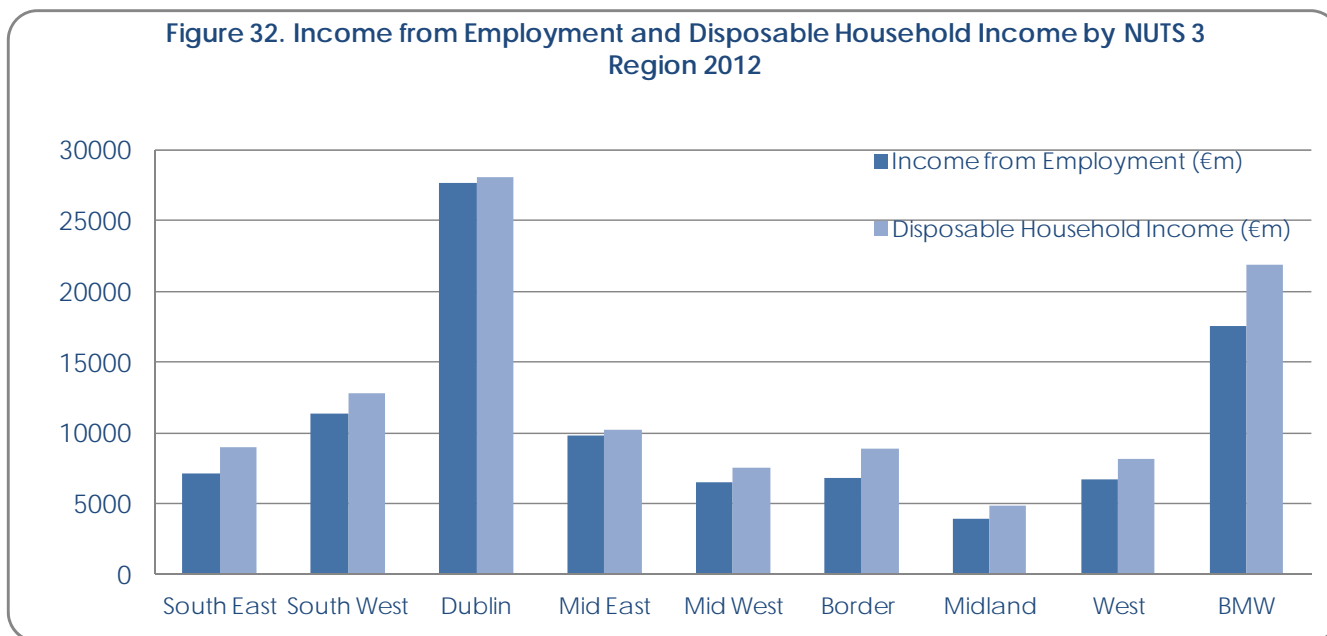
Source: CSO (2015) County Incomes and Regional GDP

Income from employment and disposable household income

There are different ways to measure income depending on what income sources, taxes etc., are counted. Figure 32 on the following page compares two measures of income for NUTS3 regions. It shows income from employment (compensation of employees plus income from self-employment) which is a useful measure of income earned from productive employment in each region and Disposable Household Income. Disposable household income counts income from employment and also rental earnings, dividends, social welfare payments and taxes paid. It measures the actual income available for use by households.

Dublin has by far the largest income under both measures with the South West and Mid East next followed by the South East. In every region, total disposable household income is greater than income from employment. This is because there is a net increase in income resulting from other sources (e.g. social welfare, rent, dividends etc.) less taxes. The difference between these two measures varies between the regions. In Dublin (1.5%) and the Mid East (4.0%) the difference is quite small while for the South East (26.6%), Border (29.3%) and Midlands (23.5%), it is relatively large. Among other factors this indicates that social transfers

play a more significant role in disposable income in these regions and that a lower share of the region's income is derived from productive employment. This is partly due to the higher unemployment rates in these regions¹³.



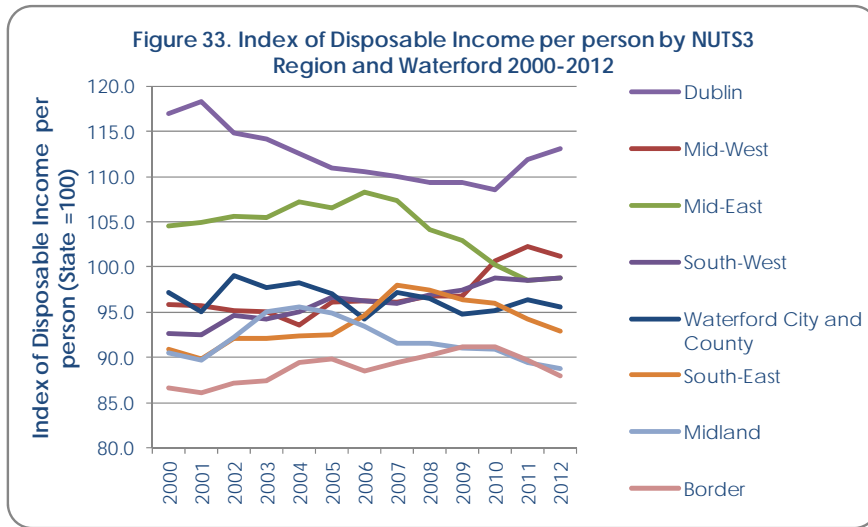
Source: CSO (2015) County Incomes and Regional GDP

Index of Disposable Income per Person

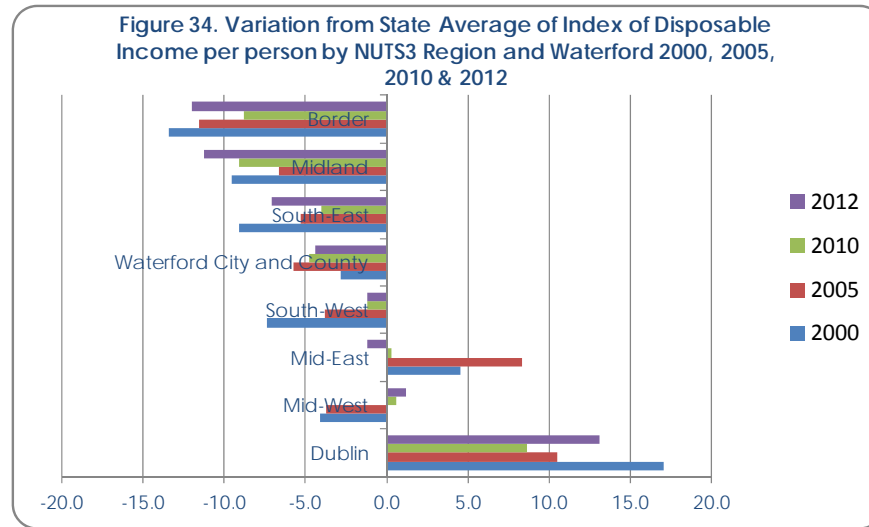
Using an index which compares each region's disposable income per person with the State average (to remove the impact of inflation and take account of a changing state average) is useful when taking a longer time period (2000-2012).

From Figures 33 and 34 on the following page it can be seen that Dublin is the only region consistently above the state average with the Mid East above the State average since 2010. The South East has fluctuated from a low of 89.8% in 2001 to a high of 98.0% in 2007 and currently stands at 92.9%. Waterford's relative position to the South East and the State has also fluctuated over the period. Waterford is consistently higher than the South East but is lower than the State average and was 95.6% in 2012.

¹³ QNHS Q2 2012 Unemployment Rates: South East 19.0%, Border 29.3%, Midlands 23.5%



Source: CSO (2015) County Incomes and Regional GDP



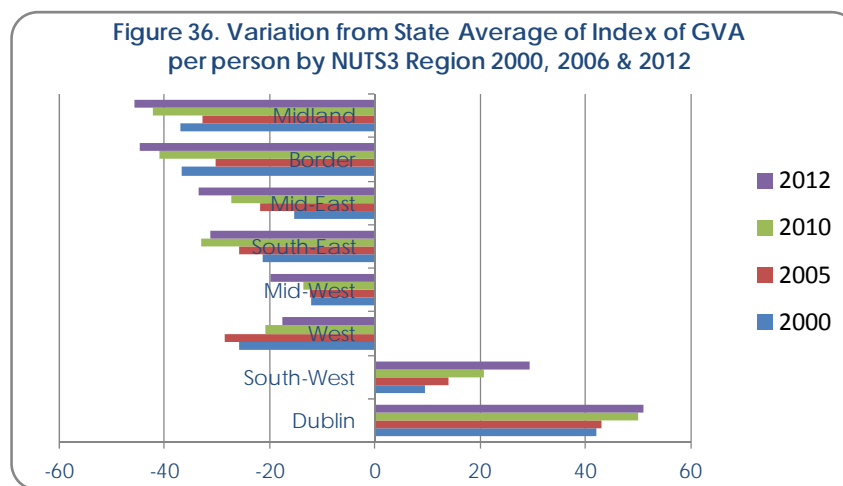
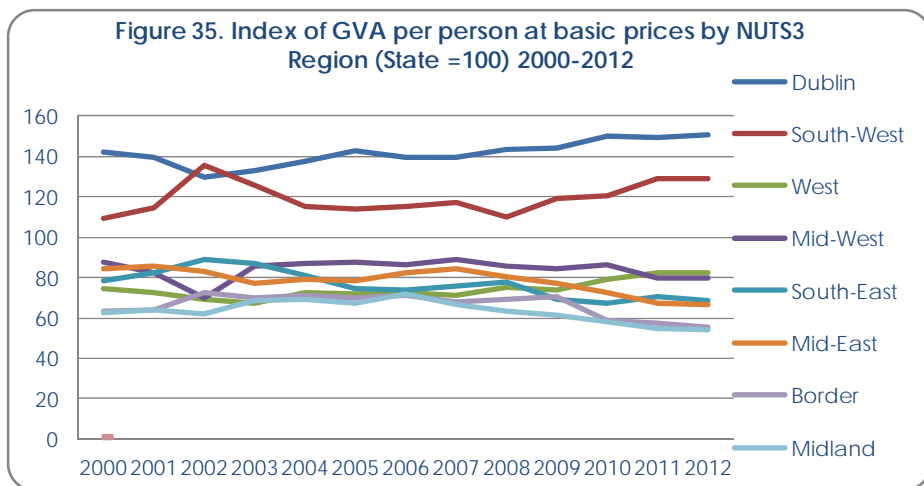
Gross Value Added

GVA per person ranges from a high of €51,839 in Dublin to a low of €18,638 in the Midlands. The GVA per person for the South East region was €23,588 in 2012 which is well below the State average of €34,308.

To examine changes in GVA per person over a period of time, it is necessary to use an index. The index gives a value of 100 to the State average for each year so illustrates changes in each region's relative position compared to the national average over time. From Figures 35 and 36, it is apparent that Dublin's relative position has increased steadily since 2003 from 133.1% to 151.1% in 2012. Its position improved particularly strongly between 2009 and 2010. In contrast, the South East's position has declined since 2002 from 88.8% to 68.8% in 2012 despite intermittent annual increases.

Figure 36 shows how each region varied from the state average index of GVA per person. It is clear that Dublin's relative position to the average has strengthened considerably as has the South West's.

GVA per person can also be equated to the EU28 showing the relative position of Ireland's regions to the EU average. This is important as eligibility for EU regional development funding is based on a region's GVA relative to the EU average. As whole, Ireland's GVA per person in 2012 was 130.0% of the EU28. The South East is below the EU average at 89.4%. The NUTS2 Southern & Eastern region was above the EU28 average at 147.0% while the BMW was significantly below at 84.3%.



Source: CSO (2015) County Incomes and Regional GDP

Source of GVA in each Region

GVA is generated from three broad areas of economic activity: Agriculture, Forestry & Fishing; Manufacturing, Building & Construction; and Market¹⁴ and Non Market Services¹⁵. In the State in 2002 Market and Non Market Services was the largest source of GVA (58.9% of the total). It is still the largest source in 2012 and its share has risen considerably to 71.5%. The second largest is Manufacturing, Building & Construction. Its share of national GVA has declined from 39% to 27%. Agriculture, Forestry and Fishing has declined from 2.1% to 1.5% in 2012, having recovered from a low of 0.9% in 2009.

The relative importance of the three different sources of GVA varies across the regions and is evidence in Figures 37 and 38. In Dublin, Market and Non Market Services comprises 87.2% of GVA, up from 78.2% in 2002. In the South East 65% of GVA is Market & Non Market Services up from 44.1% in 2002. 31% of the South East's GVA is from Manufacturing, Building & Construction which is down from 51.5% in 2002. The South West is the only region where manufacturing is the largest source of GVA accounting for 51.6% of the region's GVA. 4% of the South East's GVA is from agriculture and is the highest share nationally of the regions.

The importance of agriculture to the South East is evident from the fact that 19.9% of the State's GVA for the sector is earned in the region. The only region contributing more to the sector is the South West at 26.0%. 8.6% of Manufacturing and 6.8% of Market and Non Market Services are earned in the region.

¹⁴ Market services are defined as those services produced for sale on the market at a price intended to cover production costs and to provide a profit for the producer. Market services comprise the following five ISIC Tabulation Categories: Wholesale and Retail trade, Hotels and restaurants, Transport, storage and communications, Financial intermediation, Real estate, renting and business activities

¹⁵ Non-market services cover those services provided to the community as a whole free of charge, or to individual consumers either free of charge or at a fee which is well below 50 per cent of production costs.

Figure 37. GVA Generated by each broad sector by NUTS3 Region (%) 2012

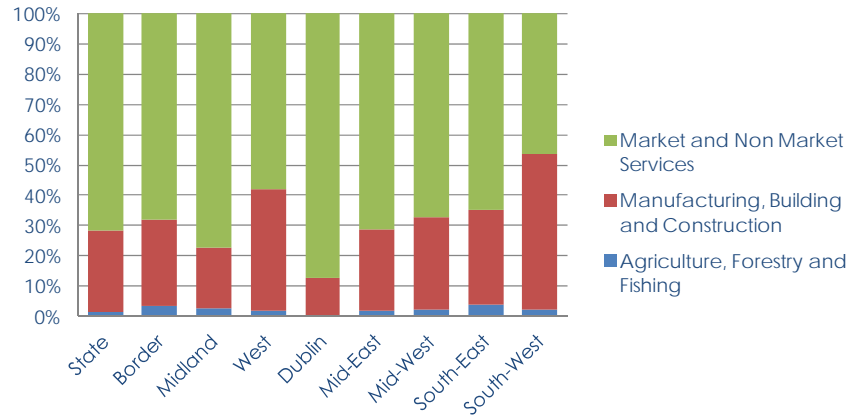
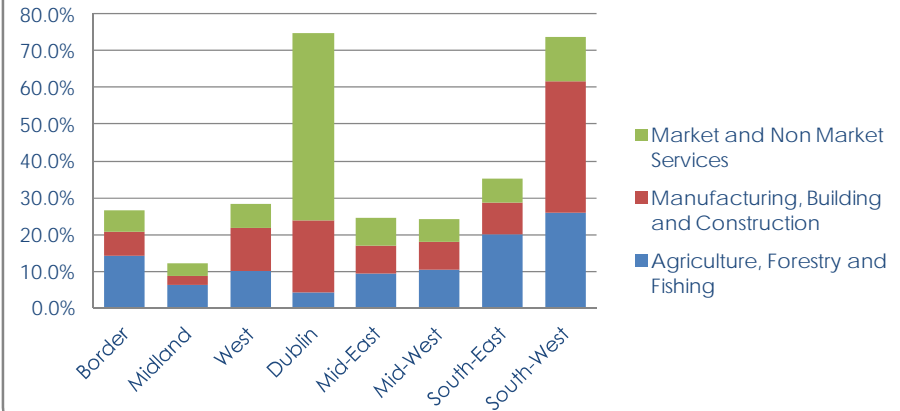


Figure 38. Percentage Contribution of GVA by Sector and NUTS3 Region 2012



Source: CSO (2015) County Incomes and Regional GDP

Sectors

Retail

The Retail Strategy¹⁶ prepared for Waterford City sets out the supply and demand situation in Waterford City which is summarised in the Table below. The strength of retail is evident in the number of enterprises¹⁷ in Waterford (1,044) and the number employed (4,475) in the sector.

Retail SWOT Analysis

Strengths

- Lack of cohesion
- Competing centres and new retail formats
- Lack of major retail anchors and multiples
- Difficulty identifying large sites for retail
- High vacancy levels
- Poor presentation of buildings
- Accessibility

Opportunities

- Capacity for increase in shopping floor space
- Development of Michael Street
- Good accessibility and car parking
- Green route
- Tourism
- Festivals culture
- Living City Initiative
- Establishment of City and Town Centre Management Groups

¹⁶ John Spain & Associates (2012) Waterford City Retail Strategy

¹⁷ CSO (2014) Business Demography

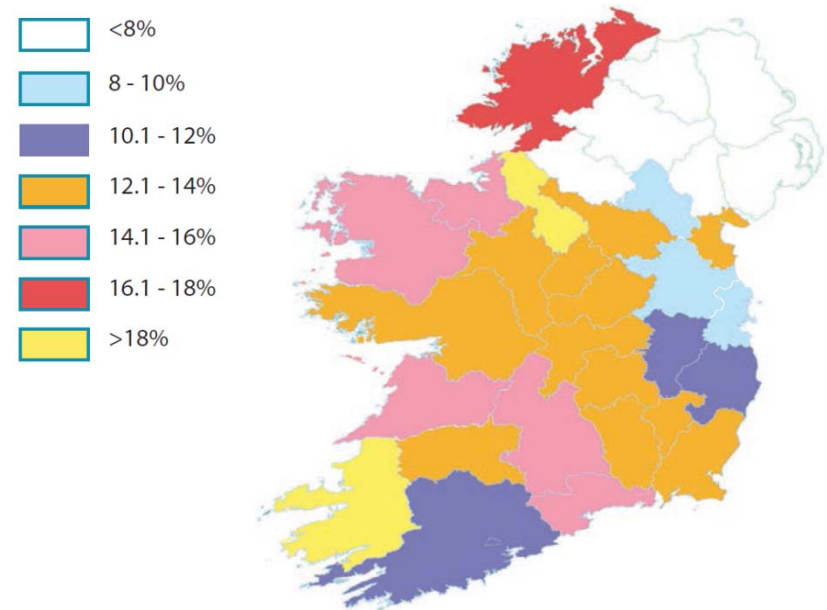
34. Available per Capita Market Spend & Estimated Market Share					
Zone	Population	Convenience Spend		Comparison Spend	
		Spend €m	Market Share %	Spend €	Market Share %
Primary PI	50,000	€190m	95%	€160m	92%
Primary PII 30 minute	40,000	€152m	58%	€128m	90%
Secondary SI 45 minute	60,000	€228m	8%	€192m	52%
Secondary SII 60 minute	120,000	€456m	0%	€384	8%
Estimated Aggregate Retail Sales Value			€287m		€393m

Source: John Spain & Associates 2012

Tourism

Tourism is a key economic sector and employer in Waterford and the South East Region. In 2013 tourism in Waterford generated €49m from overseas visitors with a further €154m being spent in the rest of the South East region. While the number of overseas visitors has increased slightly from 2010, revenue from overseas visitors has fluctuated and decreased by 10% between 2012 and 2013 and a similar decline was experienced across the region. The South East was the only region to experience a decline in both visitor numbers and revenue with all other regions experiencing an increase from 2012 figures (Table 36).

A recent report from IBEC/ ITIC (July 2015) shows the level of tourism dependency as a percentage of all enterprises in 2011. In the South East both Waterford and Tipperary have a range of 14.1%-16.0% of all enterprises in tourism with the other counties having slightly less.



Source: IBEC/ ITIC (2015) Tourism Opportunity

35. Overseas Visitors & Associated Revenue for South East Counties 2009-2013										
	2009		2010		2011		2012		2013	
Thousands	No.	€m	No.	€m	No.	€m	No.	€m	No.	€m
Carlow	60	31	59	23	58	26	69	37	68	30
Kilkenny	207	46	206	30	214	27	211	36	207	30
Tipperary (South)	100	57	104	35	114	38	124	39	117	34
Waterford	216	65	204	41	206	39	225	55	225	49
Wexford	167	47	179	45	180	39	229	65	229	60

Source: Fáilte Ireland 2014

36. Overseas Visitors & Associated Revenue for Regions 2009-2013										
	2009		2010		2011		2012		2013	
	No.	€	No.	€	No.	€	No.	€	No.	€
Dublin	3,876	1,368.0	3,413	1,152.8	3,739	1,107.4	3,641	1,267.1	3,998	1,401.4
South East	684	246.0	673	182.4	706	168.0	792	232.1	785	203.7
South West	1,514	686.8	1,448	560.1	1,646	584.7	1,799	562.8	1,860	615.9
Shannon	799	275.8	761	247.6	841	251.5	867	221.4	931	250.7
West	1,147	410.7	1,135	383.2	1,155	415.7	1,164	339.0	1,203	381.2
North West	408	150.6	524	161.4	507	143.9	428	112.6	506	176.0
East & Midlands	782	281.6	745	311.3	749	248.4	688	220.6	772	286.9

Source: Fáilte Ireland 2014

In 2014, there were 7.4m trips taken by Irish residents within the Republic with an associated spend of €1.5bn. The South West is the most popular holiday destination for Irish residents accounting for 23% of all holiday trips. The West (19%) was the next most popular destination followed by the South East (16%).

In line with holiday trips, the South West region accounted for the highest percentage of holiday nights (25%) in 2014. Twenty one percent of holiday nights were spent in the West and the South East had an 18% share. One quarter of total domestic expenditure was spent in the South West, while the West and the South East contributed 21% and 17% respectively to total holiday spend.

37. Domestic Visitors & Holiday Nights for Regions 2010-2014 (%)										
	2010		2011		2012		2013		2014	
	Visitor	Nights	Visitor	Nights	Visitor	Nights	Visitor	Nights	Visitor	Nights
Dublin	10	7	12	7	15	12	14	19	14	10
South East	19	18	21	20	18	18	16	17	16	18
South West	26	32	24	29	22	27	23	27	23	25
Shannon	9	8	9	10	10	10	8	10	9	9
West	18	19	18	16	16	17	18	19	19	21
North West	9	10	8	8	8	7	9	10	8	9
East & Midlands	8	6	11	8	12	8	12	9	11	9

Source: Fáilte Ireland 2015

38. No of Trips (000s) and Total Domestic Expenditure (€m) by main county visited 2010-2013								
	2010		2011		2012		2013	
	No	€	No	€	No	€	No	€
Waterford	301	67	335	72	254	61	242	49
Carlow & Kildare	174	26	210	29	196	29	198	24
Tipperary	137	19	144	22	152	24	155	21
Kilkenny	191	28	149	22	159	29	204	29
Wexford	580	127	547	129	481	95	455	107
Galway	737	152	686	134	561	138	739	148
Limerick	192	48	172	26	169	24	208	31
Cork	855	208	837	184	793	162	740	138
Dublin	1,116	187	1,279	194	1,392	217	1,344	195
State	7,300	1,560.5	7,169	1,415.9	7,031	1,345.4	7,111	1,373.2

Source: Fáilte Ireland 2015

39. South East Region Fee Paying Visitor Attractions Visitor Numbers 2009-2013						
	2009	2010	2011	2012	2013	2014
Waterford						
House of Waterford Crystal	114,987	85,000	148,000	163,000	180,000	180,000
Medieval Museum				40,000	34,028	
Bishops Palace				40,000	21,853	70,000
Reginald's Tower	12,305	13,065	29,368	29,184	26,468	
Dungarvan Castle	6,622	9,730	9,983	11,015	10,805	
	133,914	107,795	187,351	283,199	273,154	
Kilkenny						
Kilkenny Castle	174,164	192,777	206,277	238,244	241,032	259,250
Nicholas Mosse Pottery	100,000	95,000	92,000	105,000	115,000	120,000
Castlecomer Discovery Park	20,357	31,500	42,400	62,500	69,700	
Dunmore Caves	28,173	25,939	30,024	34,258	36,271	
Woodstock Estate & Arboretum	37,000	39,000	37,500	36,750	35,800	
Reptile Village Conservation Zoo	12,000	14,000	16,000	18,000	25,000	
Jerpoint Abbey	23,885	20,555	21,534	20,032	22,097	
Rothe House & Gardens	14,176	13,762	14,125	13,665	12,285	
St Mary's Church	2,592	2,544	2,987	3,165	2,034	
	412,347	435,077	462,847	531,614	559,219	
Carlow						
Altamount Gardens	56,878	62,455	47,514	44,862	53,541	
Visual Centre for Contemporary Art	15,000	-	-	10,342	22,499	
Carlow County Museum	-	-	-	12,000	16,000	
Huntington Castle & Gardens	1,000	1,000	2,000	3,000	5,000	
	72,878	63,455	49,514	70,204	97,040	
Tipperary						

39. South East Region Fee Paying Visitor Attractions Visitor Numbers 2009-2013						
	2009	2010	2011	2012	2013	2014
Rock of Cashel	221,481	204,276	233,038	240,406	255,338	372,503
Holy Cross Abbey						200,000
Cahir Castle	54,976	52,037	59,822	62,818	67,713	
Brú Ború	58,000	56,000	56,000	50,000	50,000	
Swiss Cottage	19,089	22,319	20,939	21,521	22,558	
Cashel Heritage Centre	35,750	27,500	25,000	20,000	20,000	
Mitchelstown Cave	10,000	10,800	10,000	98,000	10,900	
Ormonde Castle	8,218	8,108	9,539	9,240	9,922	
Mainguard	9,409	6,979	6,198	7,273	5,954	
	416,923	388,019	420,536	509,258	442,385	
Wexford						
JF Kennedy Arboretum	68,911	105,651	86,007	95,215	95,356	92,236
Wells House & Gardens					54,858	
Johnstone Castle & Gardens				47,513	51,053	
Irish Agricultural Museum	35,000	34,000	-	47,513	51,035	
Loftus Hall	-	-	-	-	40,000	
Duncannon Fort	35,000	35,000	28,000	33,000	33,000	
Wexford Wildfowl Reserve	28,894	23,097	24,582	21,413	21,037	
National 1798 Visitor Rebellion Centre	-	12,000	15,460	15,872	16,648	
Enniscorthy Castle	-	-	-	5,248	15,034	
Dunbrody Abbey & Visitor Centre	17,000	15,000	15,000	14,000	15,000	
Tintern Abbey	6,047	6,093	7,169	9,814	13,206	
Ferns Castle	4,509	5,061	5,314	8,692	5,716	
Ros Tapestry	5,300	-	-	2,845	2,400	
Ballyhack Castle	1,966	2,339	2,464	3,007	1,782	
Newtown Barry House	-	-	-	1,000	1,500	

39. South East Region Fee Paying Visitor Attractions Visitor Numbers 2009-2013						
	2009	2010	2011	2012	2013	2014
	202,627	238,241	183,996	305,132	417,625	

Source: Fáilte Ireland 2015

Agri Food

Farming and farm related industries are of major importance to the economy of Waterford and there is a strong tradition of progressive farming. The average farm size of 44.7ha is the largest of any region in the country and a total of 125,900hectares farmed¹⁸. The standard output per farm as measured by the CSO is almost double the national average. The region has an ideal climate and soil type for growing grass and grazing enterprises predominate. Dairying is the dominant enterprise in the region from an economic point of view although only one third of farms have a dairy enterprise. There is a cattle farming enterprise on almost all farms in the region. Ten per cent of the agricultural area used is devoted to crops. There are also major food processing plants in the region such as Glanbia, Dawn Meats, ABP Foods, and Flahavans.

Based on Census 2011 agriculture in Waterford employs 3,585 farmers and an additional 667 workers. Agriculture supports jobs in the rural economy both directly in food and drink processing and in the wider agri industry. According to the IFA¹⁹ there are 2,032 food and drink processing jobs supported by the agricultural output of Waterford and across the South East region there are 8,042 jobs in this sector.

The number of farms less than 10 hectares has reduced by 40% to represent only 14% of the total number of farms in 2010, compared to 20% in 1991. The number of farms greater than 50 hectares has increased from 26.2% in 1991 to 34.1% in 2010 and now represents 11% of all farms.

The age profile of farm holders is also ageing with almost half of farm holders aged 55 years or over. The number of farm holders under 35 has decreased significantly from 493 in 1991 to 207 in 2010.

40. Number of farms classified by farm size (AAU ²⁰)			
Farm size (Hectares)	1991	2000	2010
Farms less than 10	640	434	387
Farms between 10 and less than 20	546	411	412
Farms between 20 and less than 30	491	395	391
Farms between 30 less than 50	727	617	622
Farms between 50 less than 100	652	710	732
Farms greater than 100	200	219	217
Total Farms	3,256	2,786	2,761

Source: CSO Census of Agricultural 2010

¹⁸ Teagasc 2014

¹⁹ <http://www.ifa.ie/wp-content/uploads/2014/08/Waterford-Info-Sheet-2014.pdf>

²⁰ The Agricultural Area Utilised is the combined area under crops, silage, hay, pasture and rough grazing land in use (including fallow land). Areas under roads, tracks, water, bog, marsh, rocks, unused rough grazing land, buildings etc. are excluded.

SWOT Analysis of Farming in County Waterford	
Strengths Strong development culture and commercial focus among farmers in the region Strong dairy farming base in the region The region has an excellent grass growing climate	Opportunities Opportunities for expansion in dairying Opportunities for new entrants in dairying New Glanbia plant in the region Food Harvest 2020 provides a clear road map Agriculture now recognised as very important to the economy
Weaknesses 1,200 farmers have a beef enterprise which has historically given a poor return Technical performance levels among beef farmers is generally low 55% of farms in the region are fragmented into 3 land parcels or more	Threats Poor returns to beef producers could result in a reduction in farmer number Milk price collapse lasting longer than one year would create serious financial difficulties

Source: Teagasc 2014

Life Sciences

Ireland has an international reputation as a location of choice for the pharmachem and biopharma industries. Waterford is recognised by IDA Ireland as a pharma ‘hot spot’ and provides a base for a number of international pharmaceutical companies including TEVA, Genzyme and GlaxoSmithKline. Growth in this sector is also supported by a number of indigenous companies including EirGen Pharma, Eurofins Lancaster Laboratories and Pinewood Healthcare. In the medical technologies sector some of the key firms include Bausch+Lomb who employ 1,100 people, Nypro with 200 employees, and West Pharma who are investing €150m in a new facility which will employ between 150 and 300. Within the South East there is a further concentration of medical device, pharmaceutical and biotechnology firms employing a further 5,000.

The life sciences sector is supported by a number of Research Centres of Excellence including the Pharmaceutical & Molecular Biotechnology Centre (PMBRC) and the South Eastern Applied Materials Research Centre (SEAM) which are both based in WIT.

Transport Infrastructure

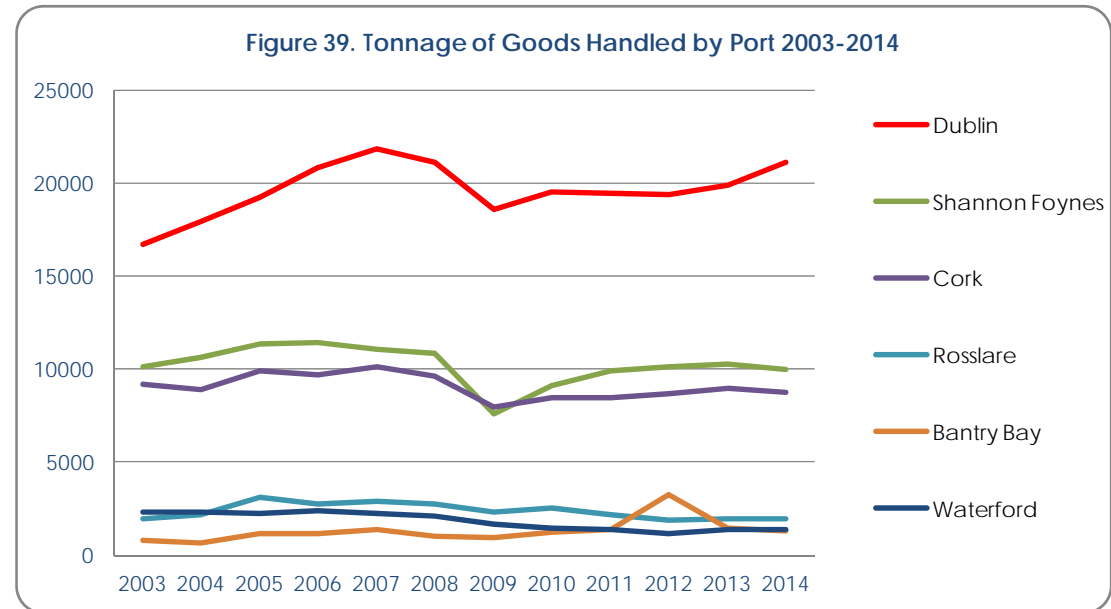
Waterford is highly accessible and is a major transportation hub with a national port and regional airport. Waterford is also situated on a number of critical and linking corridors which provide access to the country's other ports, airports and cities.

Port of Waterford

Nationally in 2014, port volume increased by more than 2% but have yet to return to the levels recorded prior to the economic downturn of 2007 with trading continuing to be affected by international economic influences. With the abolition of milk quotas, agricultural output is expected to generate spin-off opportunities for regional ports, including Waterford, to capitalise on increased agricultural output.

The Port of Waterford is a commercial semi-state company which plays an important role as an enabler of economic growth. POW is the most modern port in Ireland and the nearest port to mainland Europe with two thirds of the domestic Irish market within a 160km radius. The port's strategic location 10miles from open sea ensures the shortest sailing times between Waterford and the UK/Continent. The port is also Ireland's only port with a rail link running through the site offering a quayside railhead and giving access to the national rail network.

The port operates 24 hours a day serving blue chip clients such as Coca-Cola, Fyffes, DFDS Logistics, Samskip and Glanbia.



Source: CSO 2015

Waterford's share of national tonnage has decreased over the period 2004-2014 from 4.9% to 2.9% which is reflected in the decrease in total tonnage handled by the port from 2,342tonnes to 1,373tonnes (-41.4%).

The Port of Waterford also facilitates cruise liners with an average of 20 cruise liners bringing with them just over 10,000 visitors to Waterford annually.

41. Cruise Ships and Passenger Visits to Irish Ports by Port 2006-2012															
	2006		2007		2008		2009		2010		2011		2012		
	Ships	Passengers	Ships	Passengers	Ships	Passengers	Ships	Passengers	Ships	Passengers	Ships	Passengers	Ships	Passengers	
Bantry Bay	5	1,862	1	444	7	3,938	5	2,522	9	2,653	3	967	7	1,492	
Castletownbere	..	..	..	..	..	..	..	..	..	..	..	..	1	42
Dublin	75	60,000	40	40,996	83	74,206	76	71,837	85	91,742	85	93,336	87	86,771	
Shannon Foynes	3	1,535	63	55,000	1	315	3	1,166	4	1,045	4	1,403	4	2,640	
Galway	2	436	1	460	2	270	2	650	..	..	3	737	6	2,023
Killybegs	3	1,516	7	2,567	8	2,741	14	5,438	5	2,028	6	1,278	12	4,360	
Cork	38	32,826	2	800	51	59,716	54	71,557	51	70,409	53	70,431	57	59,898	
Tralee Fenit	..	..	..	..	2	30	..	..	..	..	..	..	..	..
Waterford	11	7,573	16	5,458	10	4,629	10	6,296	19	8,885	12	3,850	16	5,571	
All Irish ports	137	105,748	130	105,725	164	145,845	164	159,466	173	176,762	166	172,002	190	162,797	

Source : CSO 2015

Waterford Airport

Waterford Airport is a key element of the transport infrastructure in the region. Excellent road infrastructure provides access to and from the South East with the second bridge crossing reducing travel time to the airport. Waterford Airport currently serves Birmingham and London.

Waterford Airport has plans for a capital development programme to widen the airport's runway to facilitate the handling of a wider variety of aircraft and to provide a wider range of routes and services.

Passenger numbers for Waterford Airport have been declining from a high of 144,000 in 2008 to a low of 28,168 in 2013. Figures for 2014 were up 17.8% on 2013 (Table 42).



42. Total passenger numbers handled by all airports, 2007 - 2014								
Airport	2007	2008	2009	2010	2011	2012	2013	2014
Connemara	22,338	19,442	18,869	19,612	17,966	19,490	20,354	19,236
Cork	3,183,146	3,259,109	2,767,776	2,422,872	2,356,629	2,333,643	2,252,636	2,138,057
Donegal	61,410	65,539	50,761	46,825	38,309	29,226	33,768	35,415
Dublin	23,307,333	23,507,205	20,507,446	18,426,823	18,749,078	19,090,781	20,148,574	21,694,893
Galway	309,320	266,473	195,804	154,814	67,002	-	-	-
Inishmore	12,039	10,628	9,872	11,650	10,629	12,126	12,393	11,491
Kerry	391,138	426,115	356,738	383,866	310,937	286,442	306,042	294,955
Knock	544,042	630,806	606,464	586,393	653,637	677,368	665,558	703,670
Shannon	3,524,450	2,956,327	2,579,676	1,531,309	1,364,831	1,286,139	1,308,242	1,555,225
Sligo	44,533	42,493	26,706	21,077	7,111	-	-	-
Waterford	116,392	144,253	110,826	103,986	81,575	77,875	28,168	33,189
Total	31,516,141	31,328,390	27,230,938	23,709,227	23,657,704	23,813,090	24,775,735	26,486,131

Source: CSO

Roads

Waterford is linked to major urban centres in Ireland via excellent road networks. The M9 links Waterford City with Dublin, Carlow and Kilkenny and the N25 links Waterford to Dungarvan, Cork, New Ross, Wexford and Rosslare. Waterford is also served by a number of regional roads connecting the county's urban centres to the surrounding hinterlands.

43. Average Journey Times and Distance by Road		
From Waterford City to...	Distance (km)	Time
Dublin	165	1hr 40min
Dungarvan	50	0hr 40min
Cork	125	1hr 30min
Shannon Airport	150	2hr 30min
Limerick	128	2hr 00min
Galway	227	3hr 15min
Wexford	60	0hr 55min
Rosslare Europort	78	1hr 10min