



Bord Iascaigh Mhara
Irish Sea Fisheries Board

A Socio-economic Profile of Ireland's Fishery Harbour Centres

Howth

A report commissioned by BIM

Trutz Haase*
and
Feline Engling

May 2013

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1 Introduction

The purpose of this report is to assist in policy formulation for the future of Howth Harbour. Howth is one of six major Fishery Harbour Centres in Ireland, the others being Castletownbere, Dunmore East, Rossaveal, Killybegs, and Dingle. The report presents a set of background statistics which describe the social and economic characteristics of the Howth Harbour area, as well as providing additional data specific to the fishing industry. The report centres exclusively on the Howth Harbour area, but forms part of a more extensive report on the FLAG North East Region '*A Socio-economic Profile of Ireland's Fishing Communities: The FLAG North East Region including Howth Harbour Centre*'. This report can be accessed at <http://trutzhaase.eu/deprivation-index/area-profiles/>.

2 Background

Fish and shellfish are landed at the six major Fishery Harbour Centres, at forty secondary ports and a further eighty piers and landing places where fish landings are recorded. Although fishing is of great importance to the local communities that make up the Irish coastal regions, there are few statistics which show the contribution made by fishing and aquaculture to sustainable local development, how this contribution has changed over time, and what the current constraints and opportunities are for the industry and the people involved in it. The purpose of this profile is to fill this knowledge gap using existing data sources.

3 Available Data Sources

In outlining the key data sources, we draw closely on Hynes and Farrelly (2012)¹ who have recently undertaken a review of the issues involved in data collection on coastal regions in Ireland. In particular, we follow their three-fold classification of areas: shoreline EDs, coastal counties and EU coast (NUTS3). Whilst, from an EU perspective, coastal regions are defined at the NUTS3 level, Hynes and Farrelly argue that from an Irish policy perspective, the definitions at county and particularly ED level are more important than the European definition of 'coastal' at NUTS3 level, which comprises about 95 per cent of the country's population.

The data presented are drawn from Small Area Population Statistics (SAPS) at the level of Electoral Divisions (EDs). Since publication of the 2011 Census of Population, it is possible to analyse data at the level of Small Areas (SA), the new census geography. However, SAs mainly provide a subdivision of urban EDs, offering few additional insights into the predominantly rural areas of the coastal region. It would also restrict the analysis to the 2006 and 2011 censuses. Undertaking the analysis at the ED level, by contrast, allows us to draw on consistent datasets covering the past five census waves, which we believe to be of major significance when analysing the developmental trajectories of coastal communities over a 20-year period.

4 Defining Coastal Areas

The data presented here relate to the narrowly-defined major harbour areas, comprising small clusters of EDs. As we noted above, the EU defines coastal regions at NUTS 3 level. Seven out of eight NUTS 3 regions have a shoreline and the Irish Coastal Region, thus defined, would include 94.4 per cent of Ireland's population. When defining coastal regions in terms of counties with a shoreline, Coastal Counties include 22 out of 34 local authority areas, or about three quarters of the Irish population². Defining coastal regions in terms of a strip of shoreline EDs leads to the identification of

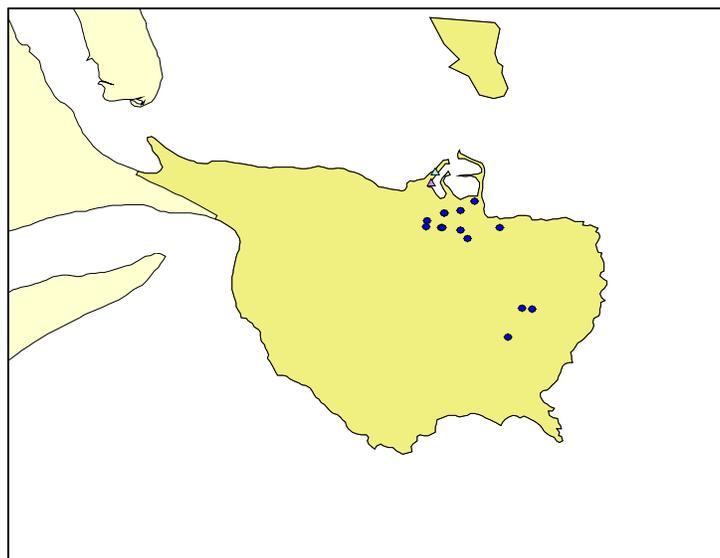
¹ Hynes, S. and Farrelly, N. (2012) "Defining standard statistical coastal regions for Ireland" in *Marine Policy*, Vol 36, pp. 393-404.

² Note: whilst using the term 'counties', we actually base our calculations on NUTS 4 regions, which are defined as Local Authorities. As the wider Dublin area comprises four such areas, South County Dublin does not have a shoreline and is excluded from the definition of coastal counties.

513 out of 3,409 EDs and about one sixth of the population, which provides a more meaningful basis for analysing the key characteristics of Irish fishing communities.

Thus defined the Howth Harbour Area (Figure 1) is made up of a single ED: Howth (4024).

Figure 1: The Howth Harbour Area



5 Key Socio-economic Indicators

In this section we present a series of socio-economic indicators for the Howth Harbour area. The data are based on five successive population censuses, spanning the period from 1991 to 2011. In addition, we report scores for the Pobal HP Deprivation Index, which provide an overall measure of relative affluence/deprivation based on ED-level census indicators.

5.1 Population

Ireland experienced sustained population growth between 1991 and 2011, leading to an overall increase of 30.1 per cent. Following a slight decline (just 0.4%) between 1986 and 1991, the population grew by 2.8 per cent during the following inter-censal period and at just over eight per cent in each of the last three periods, including 2006-2011, which coincided with the onset of recession.

Table 5.1: Population – Howth

Howth	1991	1996	2002	2006	2011	Change 1991-2011
Howth	9,173	9,008	8,706	8,196	8,256	-10.0

In stark contrast to the population growth experienced at the level of the coastal counties (28.5%), the shoreline EDs (37.1%) or in Ireland as a whole (30.1%), the Howth Harbour area has seen a population decline of 10.0 per cent over the 20-year-period. This decrease can partly be attributed to the rapidly ageing population living in Howth. Indeed, the population profile of this area is dominated more by it being an affluent residential area in proximity to the Irish capital, rather than its role as a harbour area.

5.2 Age Dependency Rate

The age dependency rate – defined as the percentage of people aged under 15 or over 64 – provides a proxy for emigration. In Ireland, the response to long-term adverse labour market conditions has long been one of emigration, particularly in rural areas. But emigration is socially and demographically selective, as emigrants tend to be of working age and to be better educated. Thus, long-term adverse labour market conditions in rural areas do not necessarily express themselves through higher unemployment rates, but also in terms of a thinning-out of the working-age cohorts, leading to a higher age dependency rate.

The strong performance of the Irish economy over the 1991 to 2006 period resulted in a steady decline in the age dependency rate from 38.1 per cent in 1991 to 31.4 per cent in 2006. Since the onset of the recession in late 2007, and indicative of a return of emigration, the ratio increased once more to reach 33.0 per cent in 2011.

Table 5.2: Age Dependency Rate – Howth (%)

Howth	1991	1996	2002	2006	2011	Change 1991-2011
Howth	30.8	30.5	30.6	34.0	38.8	8.0

The age dependency rate for the Howth Harbour area was initially significantly lower than that of the FLAG North East Region (37.8%), the shoreline EDs altogether (40.1%) or Ireland as a whole (38.1%). Starting at 30.8 per cent in 1991, this rate rose to 34.0 per cent in 2006 before reaching 38.8 per cent in 2011, which is roughly five percentage points higher than the regional or national rates. Again, the increase in the age dependency ratio in the Howth area points to the rapid ageing of the area's population.

5.3 Lone Parent Rate

The proportion of lone parents (as a proportion of all households with dependent children) has doubled over the past 20 years in Ireland, growing from 10.7 per cent in 1991 to 21.6 per cent in 2011. There are marked differences between urban and rural areas, and lone parent rates in the major cities are twice the national average (e.g. Limerick City, 37.5%).

Table 5.3: Lone Parent Rate – Howth (%)

Howth	1991	1996	2002	2006	2011	Change 1991-2011
Howth	10.3	13.4	12.8	14.8	14.0	3.7

Lone parent rates in the Howth Harbour area were initially almost identical to the rates found at the level of shoreline EDs (10.2%) as well as in Ireland as a whole (10.7%). However, by 2011 this share had increased to 14.0 per cent only, about seven percentage points below the average for the coastal EDs (21.0%) or Ireland as a whole (21.6%). This unusual development appears to be first and foremost the result of the relative affluence of the Howth area and its unaffordability for young families and lone parent families in particular.

5.4 Population with Primary Education only

There has been continuous improvement in education attainments amongst the adult population of Ireland over the past 20 years. In 1991, 36.7 per cent of those who had completed their education never went beyond primary school. This figure had halved by 2006 (18.9%) and fell further to reach 16.0 per cent in 2011.

Table 5.4: Population with Primary Education only – Howth (%)

Howth	1991	1996	2002	2006	2011	Change 1991-2011
Howth	15.9	11.8	10.3	9.0	8.1	-7.8

The educational attainments of the adult population in the Howth Harbour area are significantly higher than for the coastal counties or shoreline EDs as a whole. In 1991, only 15.9 per cent of adults who had completed education had a primary education only, less than half the rate than in the North East Region (32.8%), the coastal EDs (38.1%) or Ireland overall (36.7), marking the distinctly more affluent nature of Howth. This rate nearly halved over the next 20 years to reach 8.1 per cent in 2011. The resulting rate remains about half the rate found at the level of shoreline EDs (16.5%) or nationally (16.0%).

5.5 Population with Third-level Education

The situation is roughly analogous as far as third-level education is concerned, as the percentage of people who continued their studies beyond secondary school has more than doubled over the past 20 years. In 1991, 13.0 per cent of people in Ireland who had completed their education had attended a third-level institution. This grew to 30.5 per cent in 2006, but increased only marginally between 2006 and 2011, when it reached 30.6 per cent.

Table 5.5: Population with Third-level Education – Howth (%)

Howth	1991	1996	2002	2006	2011	Change 1991-2011
Howth	29.1	40.5	44.9	48.9	48.6	19.4

With regard to third-level education, the Howth Harbour area has an exceptionally elevated profile, which is in line with the data presented earlier in relation to primary education only. The percentage with higher education rose from 29.1 per cent in 1991 to 48.6 per cent in 2011, an increase of 19.4 percentage points, compared to 17.2 for the coastal EDs and 18.2 for coastal counties. This translates into almost half of the adult population living in the Howth Harbour area having completed third-level education, while at national level the share amounts to almost one-third. Again, the high educational attainment reflects the nature of Howth as an affluent residential area in proximity to the capital, rather than its importance as a fishing-business attracting Harbour area.

5.6 Proportion of Adult Population in Professional Classes

The changes in social class composition experienced throughout Ireland over the past 20 years largely parallel those in educational achievement, with a gradual increase in the number of professionals and a significant decline in the proportion of semi- and unskilled manual workers. At national level, the proportion of professionals rose from 25.2 per cent in 1991 to 34.6 per cent in 2011, an increase of 9.5 percentage points. Regionally, at the level of coastal counties, the North East region experienced the third highest growth (10.5%) in professionals amongst the FLAG regions over the 20-year period.

Table 5.6: Proportion of Adult Population in Professional Classes – Howth (%)

Howth	1991	1996	2002	2006	2011	Change 1991-2011
Howth	57.1	54.4	57.5	56.9	61.6	4.4

The Howth Harbour area experienced a slightly smaller increase in the proportion of professionals at 4.4 percentage points for the 20-year period. However, this low growth applies to a much higher base, starting from 57.1 per cent in 1991 and rising to 61.6 per cent in 2011. As a consequence, the proportion of professionals in the Howth area continues to be nearly twice as high as the national average.

5.7 Proportion of Adult Population in Semi- and Unskilled Manual Classes

Mirroring the gradual increase in the number of professionals, the past two decades have seen a significant decline in the proportion of semi- and unskilled manual workers. At national level, the proportion of people living in households where the reference person was classified as part of the semi- and unskilled classes declined from 28.2 per cent in 1991 to 17.5 per cent in 2011, representing a decline of 10.6 percentage points.

Table 5.7: Proportion of Population in Semi- and Unskilled Classes – Howth (%)

Howth	1991	1996	2002	2006	2011	Change 1991-2011
Howth	9.6	9.5	7.4	7.2	6.1	-3.5

In the Howth Harbour area the semi- and unskilled social classes are significantly less prevalent and reflect the nature of the resident population which is dominated by professional classes. In this area, the share of people in the semi- and unskilled classes declined by 3.5 percentage points, from 9.6 per cent in 1991 to 6.1 per cent in 2011, over the 20-year period. The latter figure remains about one-third of that observed in the coastal EDs (18.0%) or Ireland (17.5%) as a whole.

5.8 Male Unemployment

Of all census indicators used in the development of the HP Deprivation Index, the economic downturn after 2007 most strongly affected the unemployment rates. Unemployment broadly halved over the 15-year period from 1991 to 2006, but the very rapid subsequent increase has pushed the unemployment rates above their 1991 levels. Nationally, the male unemployment rate fell from 18.4 per cent in 1991 to 8.8 per cent in 2006, before rising to 22.3 per cent in 2011.

Table 5.8: Male Unemployment Rates – Howth (%)

Howth	1991	1996	2002	2006	2011	Change 1991-2011
Howth	10.4	10.1	6.3	5.6	12.3	1.9

The Howth Harbour area has had a distinctly more positive employment experience compared to the coastal counties, the shoreline EDs, or Ireland as a whole. In 1991, male unemployment was at 10.4 per cent, about half the averages prevailing at the levels of coastal counties (18.9%), coastal EDs (20.7%) or nationally (18.4%). By 2006, this had fallen to 5.6 per cent. Since the downturn in economic fortunes, the male unemployment rate has climbed back to 12.3 per cent, 1.9 percentage points above its 1991 levels. This, however, compares to a rate of 23.9 per cent for coastal EDs in general and 22.3 per cent for the country as a whole.

5.9 Female Unemployment

Female unemployment rates are considerably lower than the male rates, but did not fall at the same pace during the economic boom, primarily due to the rise in female labour force participation. Nationally, the female unemployment rate fell from 14.1 per cent in 1991 to 8.1 per cent in 2006, and nearly doubled by 2011, accounting for 15.0 per cent of the economically-active female population.

Table 5.9: Female Unemployment Rates – Howth (%)

Howth	1991	1996	2002	2006	2011	Change 1991-2011
Howth	10.1	8.0	6.0	4.6	9.8	-3

As was the case with respect to male unemployment, the female unemployment rates for the Howth Harbour area have been persistently lower than the respective rates for the coastal counties, the shoreline EDs, or Ireland as a whole. Overall, female unemployment rates in Howth were roughly five percentage points below the rates observed in the FLAG North East region as well as nationally. In

1991, female unemployment accounted for 10.1 per cent, falling to 4.6 per cent in 2006 and rising again to 9.8 per cent in 2011, 0.3 percentage points below the 1991 levels, and still about five percentage points below the rate for the coastal counties, the shoreline EDs, the North East region, or Ireland as a whole.

5.10 Housing

The last socio-economic indicator that we will discuss is the provision of local authority housing.

Table 5.10: Local Authority Housing – Howth (%)

Howth	1991	1996	2002	2006	2011	Change 1991-2011
Howth	2.0	1.9	1.9	1.7	1.6	-0.4

Overall, the Howth Harbour area is characterised by very low levels of local authority rented accommodation, again reflecting its affluent nature. In 1991, only 2.0 per cent of the total housing was local authority rented. By 2006 this share had further decreased to 1.7 per cent and in 2011 local authority rented housing accounted for 1.6 per cent only, compared to 8.5 per cent regionally and 7.9 per cent at the level of coastal counties or nationally.

5.11 Relative Affluence and Deprivation

In the previous ten sections, we analysed developments in relation to ten socio-economic indicators of relative affluence and deprivation over the past twenty years, as they apply to the country as a whole and the Howth Harbour area. In this section, we draw these observations together to form a single multivariate index, the Pobal HP Deprivation Index. The Index is well-established throughout Ireland and used across a large number of Government Departments and State Agencies and in the community sector. Attention, however, is drawn to the fact that the present report is based on the analysis carried out at the level of Electoral Divisions (ED), and differs from that based on the new census geography of Small Areas (SA), developed jointly by the Ordnance Survey of Ireland (OSI) and the Central Statistics Office (CSO) and displayed on the Pobal Maps and AIRO websites³. We present a comparison of the de-trended HP scores which are centred on zero for each census wave and have a standard deviation of ten.

Table 5.11: Relative Affluence and Deprivation – Howth

Howth	1991	1996	2002	2006	2011	Change 1991-2011
Howth	24.3	21.2	17.8	16.7	18.1	-6.1

The Howth Harbour area is considerably more affluent than the North East region (7.9) or Ireland as a whole (2.8). In 1991, the Relative HP Index score for the Howth Harbour area was 24.3, which characterises the area as very affluent by national comparison. Despite a drop of 6.1 index points over the 20-year period, the Index score in 2011 was still 18.1, which still classifies this area at the border of a comparatively affluent to very affluent area.

³ <http://maps.pobal.ie/#> and <http://airomaps.nuim.ie/flexviewer/?config=AIDepIndex.xml>.

6 Indicators specific to the Fishing Industry

This section provides additional data on the Fishing Industry. Data are provided for the number of vessel owners and the tonnage of the fishing fleet as well as the number of enterprises involved in fishing-related industries.

6.1 Fishing Vessels Owners

Information on the number of fishing vessel owners and the tonnage of the fishing fleet is provided in the annual listing of fishing vessel owners compiled by the Department of Agriculture⁴. By the end of 2012, Ireland had just under 2,200 owners of fishing vessels, with a combined tonnage of nearly 65,000 gross tons.

Table 6.1: Owners and Tonnage of Fishing Vessels – Howth

Howth	Number of Owners	Owners %	Owners per 1,000 Population	Tonnage gross-tons	Tonnage %	Tonnage per 1,000 Population
Howth	14	.64	2	361	.56	44

Although Howth is the region's major harbour area, only 14 out of 123 (or one eighth) of the region's vessel owners live in the immediate harbour area.

In terms of the number of owners per 1,000 population, fishing is about twenty times more important to the local economy as for Ireland as a whole, nearly four times more important than for the shoreline EDs, and more than twice as important compared to the shoreline EDs of the North East region. This being said, there is less than one vessel owner (0.2 per cent) per hundred population, compared to about one per hundred population in Rossaveal and Dunmore East, thus pointing to the relative small importance of fishing to the local economy, at least when concerned with the local ownership of fishing vessels and when defining the Howth Harbour area as comprising the whole Howth peninsula.

6.2 Number of Firms in Fishing-related Industries

The data used to construct Table 6.2 are based on an analysis of the NACE categorisation contained in the Geodirectory. There are four NACE codes which relate to fishing industries:

- NACE A.03.10: Fishing
- NACE A.03.21: Aquaculture
- NACE C.10.20: Processing
- NACE G.46.38: Wholesale

For Ireland as a whole, the Geodirectory identifies 371 commercial address points which are related to the four fishing industries comprising 128 fishing companies, 92 companies involved in aquaculture, 88 in fish processing and 63 wholesalers of fish products.

Table 6.2: Number of Firms in Fishing-related Industries – Howth

Howth	Fishing #	Aqua-culture #	Process-ing #	Whole-sale #	Fishing per m capita	Aqua-culture per m capita	Process-ing per m capita	Whole-sale per m capita
Howth	0	0	1	1	0	0	121	121

The North East region comprises only 30 of the 371 fishing related industries and, in turn, only very few of these are situated in the Howth Harbour area. The final table shows the number of fishing-

⁴ Available at <http://ec.europa.eu/fisheries/fleet/index.cfm> , accessed in January 2013.

related enterprises in the Howth Harbour area, comprising of one fish-processing firm and one wholesale business. Whilst these are small numbers in absolute terms, the fact that they account for 121 firms per 10,000 capita in fish-processing firms and the equivalent in wholesale enterprises shows their slightly greater importance to the local economy.

It needs, however, to be pointed out that the above information is based solely on the classification of enterprises in the geo-directory and there appears to be some undercounting, particularly of the number of wholesalers in the Howth Harbour area which can only be resolved through a more detailed survey of the harbour area.