



Bord Iascaigh Mhara  
Irish Sea Fisheries Board

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

## Rossaveal

A report commissioned by BIM

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## 1 Introduction

The purpose of this technical report is to assist in policy formulation for the future of Rossaveal Harbour. Rossaveal is one of six major Fishery Harbour Centres in Ireland, the others being Killybegs, Castletownbere, Howth, Dunmore East, and Dingle. The report presents a set of background statistics which describe the social and economic characteristics of the Rossaveal Harbour area, as well as providing additional data specific to the fishing industry. The report centres exclusively on the Rossaveal Harbour area, but forms part of a more extensive report on the FLAG West Region '**A Socio-economic Profile of Ireland's Fishing Communities: The FLAG West Region including Rossaveal 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 help 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)<sup>1</sup> 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 the 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 relates here 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

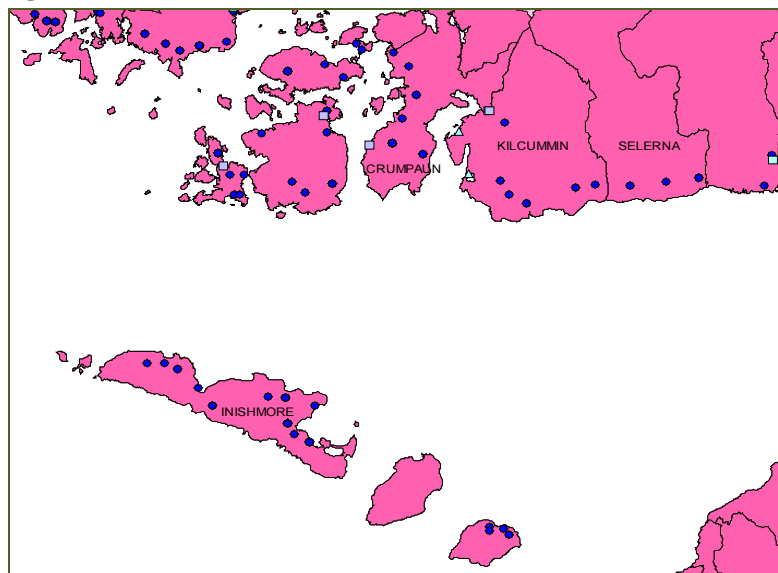
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<sup>1</sup> Hynes, S. and Farrelly, N. (2012) "Defining standard statistical coastal regions for Ireland" in *Marine Policy*, Vol 36, pp. 393-404.

population<sup>2</sup>. Defining coastal regions in terms of a strip of shoreline EDs leads to the identification of 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 Rossaveal Harbour Area comprises four EDs: Rossaveal (27054), Arainn (27053), Sailearna (27061) and An Crompan (27152).

**Figure 1: The Rossaveal Harbour Area**



## 5 Key Socio-economic Indicators

In this section we present a series of socio-economic indicators for the Rossaveal 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. During that period growth was uneven across the FLAG Regions, with the West growing at an above-average rate (35.6%) if measured at the level of coastal counties, or a below average growth of 25.2 per cent if defined at the level of shoreline EDs.

**Table 5.1: Population – Rossaveal**

Rossaveal	1991	1996	2002	2006	2011	Change 1991-2011
Arainn	1,322	1,303	1,280	1,225	1,251	-5.4%
Kilcummin	1,241	1,273	1,298	1,304	1,315	6.0%
Sailearna	1,051	1,148	1,299	1,362	1,448	37.8%
An Crompan	2,077	2,167	2,266	2,294	2,505	20.6%
<b>Rossaveal</b>	<b>5,691</b>	<b>5,891</b>	<b>6,143</b>	<b>6,185</b>	<b>6,519</b>	<b>14.5%</b>

<sup>2</sup> 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.

Population growth in the Rossaveal Harbour Area, at 14.5 per cent, was even more modest than that observed for the West more generally and points towards a potential underlying weakness of this 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 – Rossaveal (%)**

Rossaveal	1991	1996	2002	2006	2011	Change 1991-2011
Arainn	41.8	39.4	34.8	32.7	32.7	-9.1
Kilcummin	43.9	39.8	31.2	33.1	32.5	-11.4
Sailearna	42.0	41.7	34.7	33.0	34.7	-7.3
An Crompan	41.9	38.0	34.2	33.8	35.8	-6.0
<b>Rossaveal</b>	<b>42.3</b>	<b>39.4</b>	<b>33.8</b>	<b>33.2</b>	<b>34.3</b>	<b>-8.0</b>

The age dependency rate for the Rossaveal Harbour Area was initially higher than the nationally prevailing one. Starting at 42.3 per cent in 1991, this rate fell to 33.2 per cent in 2006 before increasing to 34.3 per cent in 2011, compared to 33.0 per cent nationally.

## 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 – Rossaveal (%)**

Rossaveal	1991	1996	2002	2006	2011	Change 1991-2011
Arainn	14.6	12.1	14.2	14.7	14.6	-.1
Kilcummin	7.8	8.3	12.8	17.7	21.4	13.6
Sailearna	7.8	9.4	11.4	17.8	18.8	11.1
An Crompan	6.1	8.2	15.8	23.2	23.6	17.5
<b>Rossaveal</b>	<b>8.5</b>	<b>9.3</b>	<b>13.8</b>	<b>19.2</b>	<b>20.6</b>	<b>12.1</b>

Lone parent rates in the Rossaveal Harbour Area were initially lower than the national rate, reflecting its rural character. However, by 2006, this had increased to 19.2 per cent, about two percentage points above the average for the Western coastal EDs (17.1%) and one percentage point below the national average, reaching 20.6 per cent in 2011.

## 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 (18.9%) by 2006 and fell further to reach 16.0 per cent in 2011.

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

Rossaveal	1991	1996	2002	2006	2011	Change 1991-2011
Arainn	48.7	47.2	40.0	30.7	28.8	-19.9
Kilcummin	48.3	44.7	32.2	31.5	28.1	-20.2
Sailearna	36.8	34.9	26.3	23.4	18.7	-18.1
An Crompan	54.8	48.5	33.3	34.3	26.4	-28.4
<b>Rossaveal</b>	<b>48.7</b>	<b>44.9</b>	<b>33.2</b>	<b>30.6</b>	<b>25.5</b>	<b>-23.2</b>

The educational attainments of the adult population in the Rossaveal Harbour Area are significantly lower than for Ireland as a whole. In 1991, almost half of those who had completed education had primary education only, marking a distinctly more disadvantaged composition, although this rate nearly halved over the next 20 years, reaching 25.5 per cent in 2011. While this is a significant improvement, the rate remains almost ten percentage points above the national average (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 – Rossaveal (%)**

Rossaveal	1991	1996	2002	2006	2011	Change 1991-2011
Arainn	11.2	14.8	20.2	24.4	24.6	13.4
Kilcummin	8.2	13.0	17.6	19.6	21.0	12.8
Sailearna	15.7	18.5	24.5	28.9	33.1	17.4
An Crompan	9.0	14.2	20.1	22.2	26.2	17.1
<b>Rossaveal</b>	<b>10.6</b>	<b>14.9</b>	<b>20.5</b>	<b>23.6</b>	<b>26.3</b>	<b>15.7</b>

The Rossaveal Harbour Area has a lower proportion of adults with third-level education, which mirrors the data with relation to the proportion of adults with primary education only. The proportion with third-level education rose from 10.6 per cent in 1991 to 26.3 per cent in 2011, but remains about four percentage points below the national average.

## 5.6 Proportion of Adult Population in Professional Classes

The changes in social class composition experienced throughout Ireland throughout the last 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 grew from 25.2 per cent in 1991 to 34.6 per cent in 2011. The West region had the fastest growth in professionals amongst the FLAG regions over the 20-year period (12.5 percentage points for coastal EDs, compared to 9.5 percentage points nationally).

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

Rossaveal	1991	1996	2002	2006	2011	Change 1991-2011
Arainn	15.0	17.3	23.5	27.8	26.1	11.2
Kilcummin	11.3	13.4	19.9	21.5	24.0	12.7
Sailearna	20.8	21.2	27.8	34.4	37.2	16.4
An Crompan	16.5	17.2	20.3	25.5	25.1	8.6
<b>Rossaveal</b>	<b>15.8</b>	<b>17.2</b>	<b>22.5</b>	<b>27.1</b>	<b>27.8</b>	<b>12.0</b>

Similarly, the Rossaveal Harbour Area experienced an above-average increase in the proportion of professionals at 12.0 percentage points for this 20-year period. However, this applies to a much lower base, starting from 15.8 per cent in 1991 and rising to 27.8 per cent in 2011.

## 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.

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

Rossaveal	1991	1996	2002	2006	2011	Change 1991-2011
Arainn	43.3	55.0	43.5	26.7	28.9	-14.4
Kilcummin	49.7	46.6	34.9	26.6	28.6	-21.2
Sailearna	43.9	39.3	31.3	24.2	19.8	-24.1
An Crompan	49.6	46.0	37.9	28.2	21.4	-28.2
<b>Rossaveal</b>	<b>47.0</b>	<b>46.7</b>	<b>36.8</b>	<b>26.6</b>	<b>23.9</b>	<b>-23.1</b>

In the Rossaveal Harbour Area the semi-and unskilled social classes are more prevalent and reflect the nature of the local labour force. The share of people in these classes declined 23.1 percentage points, from 47.0 per cent in 1991 to 23.9 per cent in 2011.

## 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 – Rossaveal (%)**

Rossaveal	1991	1996	2002	2006	2011	Change 1991-2011
Arainn	41.8	22.5	26.7	23.8	31.4	-10.3
Kilcummin	38.3	34.6	19.5	26.6	40.9	2.6
Sailearna	30.4	25.3	17.6	11.8	31.4	.9
An Crompan	40.6	38.0	24.6	20.6	39.2	-1.5
<b>Rossaveal</b>	<b>38.6</b>	<b>31.0</b>	<b>22.5</b>	<b>20.7</b>	<b>36.2</b>	<b>-2.4</b>

The Rossaveal Harbour Area has had a distinctly poorer employment experience compared to Ireland as a whole. Male unemployment in 1991 was at a staggering 38.6 per cent, exactly twice the nationally rate. By 2006, this had fallen 20.7 per cent, but was still more than twice the national rate. Since the downturn of the economy, male unemployment rates in Rossaveal have climbed back to

36.2 per cent, 2.4 percentage points below their 1991 levels and more than one-and-a-half times the nationally prevailing rate.

## 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 – Rossaveal (%)**

Rossaveal	1991	1996	2002	2006	2011	Change 1991-2011
Arainn	26.1	16.6	14.8	13.3	21.1	-5.0
Kilcummin	22.2	22.6	17.6	15.4	13.5	-8.7
Sailearna	19.7	14.9	8.4	8.0	19.7	.0
An Crompan	19.9	23.4	16.4	14.3	23.7	3.7
<b>Rossaveal</b>	<b>21.6</b>	<b>20.1</b>	<b>14.6</b>	<b>12.8</b>	<b>20.4</b>	<b>-1.3</b>

As was the case with respect to male unemployment, the female unemployment rates for the Rossaveal Harbour Area have been persistently higher than the national rates. The rates for Rossaveal fell from 21.6 per cent in 1991 to 12.8 per cent in 2006 and rose again to 20.4 per cent in 2011.

## 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 – Rossaveal (%)**

Rossaveal	1991	1996	2002	2006	2011	Change 1991-2011
Arainn	2.9	1.9	.9	1.4	1.7	-1.2
Kilcummin	4.9	5.3	5.6	4.3	4.9	.0
Sailearna	1.4	1.8	2.1	2.5	1.2	-.2
An Crompan	3.3	3.7	4.1	3.9	7.2	3.9
<b>Rossaveal</b>	<b>3.2</b>	<b>3.3</b>	<b>3.3</b>	<b>3.2</b>	<b>4.3</b>	<b>1.1</b>

Overall, the Rossaveal Harbour Area is characterised by very low levels of local authority accommodation. In 1991, local authority rented housing accounted for just 3.2 per cent of the total and remained at this level for the next fifteen years. A small increase can be observed between 2006 and 2011, since the onset of the recession, reaching 4.3 per cent in 2011.

## 5.11 Relative Affluence and Deprivation

In the previous sections, we analysed developments in relation to ten socio-economic indicators of relative affluence and deprivation over the past 20 years, as they apply to the country as a whole and the Rossaveal 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), as displayed on the Pobal Maps and AIRO websites<sup>3</sup>. We present a comparison of the de-trended HP Index scores which are centred on zero for each of the five census waves and have a standard deviation of ten.

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

**Table 5.11: Relative Affluence and Deprivation – Rossaveal**

Rossaveal	1991	1996	2002	2006	2011	Change 1991-2011
Arainn	-11.4	-8.2	-11.0	-10.3	-8.4	3.1
Kilcummin	-12.8	-13.4	-9.9	-15.8	-11.8	1.0
Sailearna	-3.6	-5.3	-2.5	-1.9	-1.1	2.5
An Crompan	-13.8	-13.4	-11.0	-13.4	-9.5	4.2
<b>Rossaveal</b>	<b>-11.1</b>	<b>-10.7</b>	<b>-9.0</b>	<b>-10.7</b>	<b>-7.9</b>	<b>3.2</b>

The Rossaveal Harbour Area is considerably more disadvantaged than the West region or the country as a whole. In 1991, the Relative HP Index score for the Rossaveal Harbour Area was -11.1, indicating that this is a disadvantaged area by national comparison. Despite a significant improvement of 3.2 points over the 20-year period, the Index score in 2011 was still -7.7, which would still classify as comparatively deprived. It is also worth noting that of the four EDs which make up the Rossaveal Harbour Area, Sailearna is slightly less disadvantaged, whilst the other three EDs show signs of even greater weakness.

## 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 Agriculture<sup>4</sup>. 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 – Rossaveal**

Rossaveal	Number of Owners	Owners %	Owners per 1,000 Population	Tonnage gross-tons	Tonnage %	Tonnage per 1,000 Population
Arainn	35	1.6	28.0	1,538	2.4	1,229
Kilcummin	8	0.4	6.1	224	.3	170
Sailearna	6	0.3	4.1	8	.0	5
An Crompan	13	0.6	5.2	21	.0	8
<b>Rossaveal</b>	<b>62</b>	<b>2.8</b>	<b>9.5</b>	<b>1,790</b>	<b>2.8</b>	<b>275</b>

When based on coastal counties, the FLAG West Region accounts for almost exactly one fifth (19.8%) of fishing vessel owners and most of these reside within the coastal EDS. Although Rossaveal is the principal harbour area of the West Region, only a small percentage of vessel owners reside within the immediate harbour area. In total, 62 out of 438 (or one in seven) of the region's vessel owners live in the narrowly-defined harbour area. This equates to about one vessel owner per 100 population, or about one for every 30 households. Nevertheless, in terms of the number of owners per 1,000 population, fishing is about 20 times more important to the local economy as for Ireland as a whole.

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



## 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 – Rossaveal**

Rossaveal	Fishing	Aqua-culture	Process-ing	Whole-sale	Fishing	Aqua-culture	Process-ing	Whole-sale
	#	#	#	#	per m capita	per m capita	per m capita	per m capita
Arainn	0	0	0	0	0	0	0	0
Kilcummin	0	0	2	0	0	0	1521	0
Sailearna	0	0	0	0	0	0	0	0
An Crompan	0	3	0	0	0	1198	0	0
<b>Rossaveal</b>	<b>0</b>	<b>3</b>	<b>2</b>	<b>0</b>	<b>0</b>	<b>460</b>	<b>307</b>	<b>0</b>

The West Region comprises only 50 of the 371 fishing related industries, and the Rossaveal Harbour Area, in turn, hosts only a minute share of these. The harbour area is host to three aquaculture businesses, all in An Crompan ED, and two fish-processing firms in Kilcummin ED. Whilst these are small numbers in absolute terms, the fact that they account for 12 firms per 10,000 capita in aquaculture and 15 firms per 10,000 residents in fish processing, nevertheless shows their relative importance to the local economy.