

Socio-Economic Statement

Local Economic & Community Plan

County Clare

May 2015

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1. Introduction

The Local Government Reform Act 2014 provides for a lead role for local government in economic development and community development. This is reflected in the Government's Action Programme for Effective Local Government which has a stated vision of 'that local government will be the main vehicle of governance and public service at local level, leading economic, social and community development'.

Section 44 of the Local Government Reform Act 2014 provides for the making of a 6-year integrated Local Economic and Community Plan (LECP). Guidelines on the making of integrated Local Economic and Community Plans issued from the Department of the Environment, Community & Local Government in January 2015. The plan will set out the objectives and actions needed to promote and support the economic development and the local and community development of the County and is an important measure in the Government's Action Plan for Jobs. It will be consistent with the Regional Planning Guidelines 2010-2022, the core strategy of the County Development Plan, the County Development Plan itself, the Councils Corporate Plan and with current Government economic and social inclusion policy generally. The targets set out in EU 2020 will be the basis for the development of objectives and targets in the LECP. It is noted that the existing Regional Planning Guidelines are due to be replaced by Regional Spatial and Economic Strategies to be prepared by the Regional Assembly in 2016, and in that regard, the LECP will be reviewed in early 2017 in order to ensure consistency with the RSES.

The economic elements of the LECP will be developed by the Councils Strategic Policy Committee (SPC) for Economic Development and Enterprise while the Local Community Development Committee (LCDC) will develop the community elements of the LECP. The integrated plan will be adopted by Clare County Council. The first LECP will be completed by 31st December 2015. The preparation of the Plan will be overseen by an Advisory Steering Group, the membership of which is drawn from the SPC, the LCDC and local authority officials.

2. Economic Development & Spatial Planning

The economic development role of local government is now regarded as a mainstream local authority function. The preparation and implementation of the economic elements of the LECP will require active engagement by all agencies and stakeholders that hold an economic and enterprise remit. The promotion of economic development and appropriate policy formulation will be of critical importance in ensuring that the economy of County Clare grows to its full potential. The Mid-West Regional Planning Guidelines 2010-2022 and the Clare County Development Plan 2011-2017 (as varied) contain several opportunities that aim to ensure County Clare's competitive advantage in the areas of: international connectivity (Shannon International Airport); the critical mass presented by the linked Gateway and Hub town (Limerick/Shannon/Ennis); road and rail connectivity; educational facilities; natural resources such as the Shannon Estuary; tourism; and the region's capacity for renewable energy generation.

3. Local and Community Development

Local government continues to play a key role in local and community development and the Local Government Reform Act 2014 further strengthens this function. Community initiatives and service provision at local level is evident through the wide range of services delivered including libraries, leisure facilities and amenities, arts programmes, estate management, urban and village enhancement schemes, playgrounds, burial grounds and the provision of supports to tidy towns groups etc. This input is also reflected in a number of strategies/plans that were adopted by the Council through the work of the County Development Board and these include:

- Traveller Strategy
- Immigrant Strategy
- Active Living Strategy
- Tourism Strategy & Action Plan
- Age Friendly Strategy

The establishment of the public participation network structures in the County provide an opportunity to create a greater synergy between local government and local and community development and will place local and community development at the heart of local government.

The Local Community Development Committee (LCDC) will play a pivotal oversight role of local and community development programmes and in preparing the community element of the LECP.

4. EU and National Targets

Europe 2020 is the EU's growth strategy for the coming decade. The priorities of the strategy are that Europe will become a smart, sustainable and inclusive economy and therefore deliver high levels of employment, productivity and social cohesion to each member state. Five headline targets have been set at EU level focusing on the areas of employment, research and development, climate change, education and poverty. Ireland has committed to achieving these targets and they are documented in the 'National Reform Programme Ireland April 2014', as follows:

1. **Employment:** that by 2020, the employment rate among the 20-64 year olds will have increased from the current 64%¹ to between 69% and 71% - **Quarterly National Household Survey (QNHS).**
2. **Research and Development:** that by 2020, investment in R & D, between Public and Private expenditure, will be 2.2% of GDP or 2.5% of GNP.
3. **Climate Change and Energy:** that by 2020,
 - a. the emissions, not covered by the 'Emissions Trading System', will be reduced by 21% of 2005 levels (20% of 1990 levels).
 - b. the percentage of energy generated from renewable will be 16%.
 - c. energy efficiency, in terms of 'Primary Energy', will have increased by 20%.
4. **Education:** that, by 2020,
 - a. the percentage of those 18-24 year olds, with Lower Secondary Education or less and not in further education/training, will be 8% (currently 10.6%). **(QNHS).**

¹ As measured by the Quarterly National Household Survey (QNHS). As QNHS Data is not available at County level this profile uses county level trend data derived from the various censuses and compares those trends to the QNHS.

- b. the percentage of the 30-34 age group who have completed 3rd Level education will be at least 60% (currently 49.4%). **(QNHS) and (Eurostat).**
5. **Poverty:** that, by 2020,
- a. the number experiencing 'consistent poverty' (who are both 'at-risk-of' poverty and experiencing 'basic deprivation') will be 2% or less of the population (6.3% in 2010) – **Annual Survey of Income and Living Conditions (SILC) and Reported in Social Inclusion Monitor**
 - b. 200,000 less people will be living in 'combined' poverty (either 'consistent' poverty, 'at-risk-of' poverty or 'basic deprivation'). Currently 277,000 people experience such conditions – **(SILC) and Reported in Social Inclusion Monitor**

5. Plan Preparation

There will be four phases to the preparation of the Plan, namely: preparation, public consultation, development of objectives and actions and finalisation of the Plan. Monitoring and review of the implementation of the Plan will also be documented.

Phase 1 includes establishing and analysing the socio-economic evidence base. A socio-economic statement including high level goals will be developed by the Advisory Group and adopted by the SPC and the LCDC.

Phase 2 includes a four week public consultation period on the socio-economic statement and the high level goals. Written submissions will be invited during this period and a report on submissions will be prepared which will be considered by the SPC and the LCDC. The statement will be revised (if necessary) and then referred to each of the four Municipal Districts and to the Regional Assembly.

Phase 3 includes addressing data gaps (if any) identified at phase 2 and consultation with relevant agencies and organisations and public consultation with a view to identifying objectives, actions and clear targets for the economic and community elements of the plan. This draft plan will then be presented to the SPC and the LCDC and thereafter considered by the Municipal Districts and the Regional Assembly. The members of each Municipal District will adopt a statement on the draft of both elements of the LECP and this will be a reserved function. The Regional Assembly will also adopt a statement on the draft of both elements of the plan.

Phase 4 will see the SPC, the LCDC and Clare County Council consider and adopt the final draft. The adopted plan will then be submitted to the Minister and published by Clare County Council.

6. Socio-Economic Evidence-Base

6.1 Introduction

This socio-economic profile of County Clare takes an approach that is inter-generational (1981-2011), gender-based (Female/Male) and spatial (County, Municipal District and Electoral Division). While generally drawing on Census of Population Data, the most recent point-in-time data (eg. Live Register) is also presented. A number of topics are examined using this approach, namely, Population, Employment/Economy, Education, and Poverty Reduction/Social Exclusion, Research/Development/ Innovation and Climate Change/Energy.

6.2 Population

6.2.1 Population Change

In the period 1981-2011, Clare's population grew by **34%** from 87,567 to 117,196 and by **5.6%** in the period 2006-2011. The largest growth (9,271) took place in the period 1996-2002 and the next highest (7,673) in the period 2002-2006 and the third highest (6,246) in the period 2006-2011. The County's population growth trend generally matched that of the State, although it exceeded it slightly in 2002 and 2006.

Ennis Municipal District (MD) experienced the highest population growth rate (**66%**) of the four Municipal Districts, increasing from 19,907 (1981) to 33,010 (2011). Shannon MD (**52%**) and Killaloe MD (**39%**) also experienced population growth rates greater than that of the County. However, West Clare MD only achieved **2.6%** population growth over same period.

The more recent three inter-censal periods have been typified on the basis of which sectors contributed most to GDP growth. The period 1996 -2002 was typified by the major contribution of 'export-oriented' sectors leading to what was described as 'export-driven growth'. The period 2002-2006 was typified by the major contribution of the construction and home-market sectors leading to what was described as 'construction-driven growth'. The period 2006-2011 was typified as the 'recession period'.

Ennis MD and Shannon MD achieved their greatest growth rates of 21% and 12%, respectively, over the '96-'02 intercensal period, suggesting that they were best placed to avail of 'export-driven' economic growth.

West Clare MD achieved its highest population growth (6%) in the '02-'06 period -'construction driven growth', suggesting that it was best placed to avail of this form of growth. It appears that it could draw on an under-employed farm-based pool of labour.

Killaloe MD experienced its greatest growth (11%) in the period '06-'11, suggesting that its proximity to a major City (Limerick) was the reason for its highest population growth in the 'recession period'.

While the County's Population increased by 5.6% in the period 2006-2011, the population of the Settlements increased by 9.3%. The strong trend of urbanisation resulted in almost 50% of the County's population living in Towns and Villages. Liscannor, Quin and Sixmilebridge settlements experienced population increases in excess of 50% while Corofin, Kilfenora, Killaloe had population growth in excess of 25%. Clonlara, Crusheen, Kildysart, Ardskeagh, Ardnacrusha and Inagh had population growth in excess of 20%. Many of the settlements experiencing the highest population increases were in W. Clare MD. Ballycannon, Lisdoonvarna, Feakle, Kilkee and Whitegate experienced population decline of -1%, -4%, -7%, -14% and -19%, respectively.

It is noticeable that, while the county's population grew by **34%** in the period 1981 – 2011, fifty seven of Clare's 152 Electoral Divisions (EDs) experienced population decline over the period. Thirty six declined by more than 10%. In contrast to the growth of the settlements in W. Clare, the vast majority of the EDs in W. Clare experienced Population decline. It is interesting that some of those EDs that displayed population growth over the 30 year period, actually experienced population decline in the most recent intercensal period.

6.2.2 Population Density

In 2011 all EDs in Ennis and Shannon MDs showed population densities of more than 22 People per Ha. However, more than half the land mass of W. Clare MD had a population density of less than 12 people per Ha.

The perception that there has been a major shift in the relative population density in the County is borne out by the fact that, when the upper category of 2011 (>22 people per Ha) was adjusted to > 16 people per Ha. in proportion to the population of 1981, a large section of the county in 1981 had a population density >16 people per Ha. This was particularly the case in W. Clare MD. The concentration (urbanisation) of the county's population has resulted in a significant shift in the balance of the population towards Mid to South East Clare

6.2.3 Population Migration

An age-cohort analysis by sex of the 0-9 yr cohort of 1981 over the different intercensal periods for the County and MDs shows that, at county level, the 9,456 Males in the 0-9 yrs age group in 1981 expanded by 222 in 1986 when they were aged 5-14 yrs as a result of in-migration of children in that age group. Thereafter, the Male cohort declined by almost 2,000 up to 2002 when it aged 20-29. This decline could be associated with attendance at Third level after which people continued to live outside the county. A similar pattern was apparent in the Female cohort.

Very large net in-migration of approximately 1,200 in each sex occurred in the 25-34 age group in the period 2002-2006 and to a lesser extent (400 Males and 1,000 Females) in the 30-39 age group (2011). In fact, by 2011, Female net in-migration offset the earlier net outward migration. Overall there were more females in 2011 (9,106) than in the same cohort (0-9 years) in 1981 (9,071). However, by 2011, the Male cohort of 2011 (8,717) was 8% (739) smaller than in 1981 (9,456). The County seemed to attract Females to a far greater extent than Males.

While the pattern of net out-migration in the years of 3rd Level Education (15 – 24 yrs) was common to all MDs for both sexes, the later pattern of recovery experienced at County level was not shared by all MDs. The number of Males (2,718) and Females (2,973) in Ennis MD was 22% and 45% **greater** than the same cohorts in 1981.

The number of Males (2,213) and Females (2,203) in W. Clare was, respectively, 29% and 28% less than in 1981. Ennis MD had the greatest drawing power of all MDs and W. Clare the least.

6.2.4 Population Dynamics – Long-term sustainability

A number of features indicate a population's potential to socially and economically sustain itself into the future. These include: the relative size and sex balance of the 15 year replacement population (0-14 Years); the migration patterns and sex balance within the working age population (15-64 years); the relative size of the 65+ age group. What may start off as a large cohort, sexually balanced, may become quite small and sexually imbalanced as the working age population grows older. As a consequence it may become less capable of sustaining the older age population (65+). These features are examined by means of population pyramids.

The Population pyramid for County Clare indicates that in 2011, Males and Females in the 0-14 year age groups (replacement age groups) constituted **22.2%** of the County's population. The older population (65+) constituted 12.4% of the population. Females accounted for a greater share of people aged 75+.

6.2.4.1 Replacement Population – Youth Dependency

The youngest age groups (0-4 years, 5-9 years, 10-14 years) constituted 7.6%, 7.4% and 7.2%, respectively, of the County's population, a somewhat similar percentage to that of the 35-39 age group (7.8%) and the 40-44 age group (7.6%). The pattern of out-migration, noted earlier, in the 15-24 age-group was clear. As noted earlier from the age-cohort analysis the population loss in the 15-30 age-group was almost restored in the case of Males and more than restored in the case of Females.

While the replacement age group (0-14years) constituted **22.2%** of the County's population it constituted 23.3% in Ennis MD, 23% in Killaloe MD, 22.4% in Shannon MD, but only 20.4% in W. Clare MD. West Clare MD has the weakest replacement population of the four MDs.

In terms of Late Secondary and Third Level age groups (15-24 years), Males and Females constituted **11.8%** of the County's population compared to **13.5%** in Killaloe MD, **12.6%** in Shannon MD, **10.9%** in W. Clare MD and **10.8%** in Ennis MD (Diagram 11 p. 7). There are two likely reasons for these results.

3rd. Level students can continue to live in Killaloe and Shannon MD and travel to 3rd. Level to a far greater extent than their counterparts further away in the MDs of Ennis and W. Clare. Some of the 3rd. Level Students from Ennis and W. Clare MDs who take up residence around their Education Institutes do so in Killaloe MD in particular.

6.2.4.2 Older People – Older Dependency

Males and Females in the 75+ age groups (increasing dependency age-groups) accounted for **5.2%** of the County's population compared to 4.6% in Ennis MD, 3.5% in Shannon, 4.7% in Killaloe MD and 7.4% in W. Clare MD, with the latter displaying an old age dependency rate almost 50% greater than the county average.

Overall, W. Clare MD displayed a much weaker population dynamic than any of the other MD. A smaller percentage of its population was in the replacement age bracket (0-14). It had the highest percentage of out-migration in the age group 15-24 years and this was not replaced in later years by net in-migration to the extent that it was in other MDs.

6.2.5 Population - Key Features

The pattern of population growth (34%) of County Clare over the period 1981-2011 generally followed the National growth pattern. Population growth was greatest in the MDs of Ennis (66%), Shannon (52%) and Killaloe (39%) and least in W. Clare (2.6%).

Different MDs experienced their greatest population growth in different inter-censal periods. Ennis and Shannon MD's had their largest population increases in the export-driven period of 1996-2002. W. Clare MD had its largest population increase in the construction-driven period of 2002-2006. Killaloe MD had its largest population increase in the recession period of 2006-2011. Many Towns and Villages experienced population growth in the period 2006-2011 in excess of twice the County average and many of these settlements were located in W. Clare MD. Only five settlements experienced population decline. There was a strong trend of urbanisation with the result that by 2011 almost 50% of the County's population lived in Towns and Villages.

The relative population density of the county changed with the increasing urbanisation. All of the EDs of Ennis and Shannon MDs had population densities in excess of 22 people per Ha. while only 30% of EDs in W. Clare MD had such densities.

There was a pattern of significant net out-migration in the Late Secondary school-going and 3rd. Level age group (15-24) at county and MD level. However, this was not as marked in Killaloe and Shannon MDs as a result of their proximity to the University City of Limerick where, the closer students were, the more likely they were to travel. While net out-migration in the 15-24 age-cohort was reversed in the older age groups (25-64), particularly among Females, W. Clare did not experience such a reversal. In general, Clare attracted larger number of Females than Males in the 25-64 age-group.

6.3 Employment and Economy

6.3.1 Introduction

It should be noted that the usual analysis of CSO Census of Population data in relation to Employment gives the impression that workers and jobs are co-located. It cannot be over-emphasised that there is little basis for assuming that workers find jobs where they live, particularly if they live in rural areas. In other words, the workforce residing in any location should not be equated with the number and type of jobs in that location or even proximate to it. Workers often travel quite a distance to get to their place of work. The number, sector and location of jobs is analysed later.

6.3.2 Employment Rate

The Employment Rate is defined as the percentage of any age group who are 'At Work'. The Male Employment Rate of the Working Age Population (15-64 years) varied across all MDs by as little as +/- 0.25% above and below 63.75%. However, the Female Employment Rate showed much greater variation of +/- 2.20% above and below 55.70% with Killaloe MD (53.5%) displaying the lowest rate.

Nationally the Employment Rate is measured each quarter by means of the Quarterly National Household Survey (QNHS). As the Census of Population was taken in Q2 of 2006 and 2011 this data could be compared to the QNHS data. The Census of Population data for 2011 allowed Clare's Employment Rate to be compared with the National QNHS data. It was clear that the National Employment rate of 59.2% (QNHS) in Q.2 for 2011 was very similar to Census of Population for Clare 2011 at 59.5%. The National Male Employment Rate (62.8%) was less than that of the County (63.7%) while the National Female Employment Rate (55.6%) was slightly higher than that of the County (55.4%)

The National Reform Programme aims to improve the Employment Rate of those aged 20-64 from its current level of 64% (Q. 4-2014) to between 69% and 71% by 2020. Clare is quite likely to achieve such targets, although such expectations need to be tempered by the historical decline in the Mid-West's share of National Employment from 8.63% (1998) to 7.93% (2014), which impacts on Clare's performance relative to the National performance.

6.3.3 Educational Profile of the Workforce

Between 1991 and 2011, the percentage of the workforce with 3rd Level qualification increased by 16% from 22% in 1991 to almost 38% in 2011 or approximately 0.75% per year. The percentage of the Workforce with Lower Secondary or Less declined from 42% to 19%. A similar pattern was apparent across the MDs as the educational profile of the workforce rapidly increased.

While, as noted earlier, females accounted for 47% of the overall workforce in 2011, females with 3rd Level qualifications accounted for a greater percentage of the workforce (19%) than males (11%) with similar qualifications. This pattern was reflected across all MDs. The greatest difference was in W. Clare MD. It was apparent that the feminisation of the workforce was accompanied by greater female representation among those with 3rd Level qualifications.

6.3.4 Age Profile and Gender Mix of the Workforce

In the period 1981-2011, there was a decline in the share of overall employment by those 65+ (from 6.2% to 3.1%) and those 15-24 years (from 21.8% to 5.9%). People were retiring earlier and younger people were continuing longer in education. As a result, the majority of the workforce was aged 25-64 years and accounted for 91% of the entire workforce in 2011 compared to 72% in 1981. It was also noticeable that, by 2011, the female workforce was proportionately represented across all age groups at just 2% less than Male participation. The one exception was in the 25-34 age-group where Female participation (12.5%) exceeded that of Males (11.8%).

The pattern of the County's workforce by Age and by Sex was replicated across all MDs. By 2011, the 25-64 age-group accounted for 92.0%, 91.2%, 91.2%, 89.8% of the workforce in the MDs of Ennis, Shannon, Killaloe and W. Clare MD, respectively. The slightly older workforce (65+) in W. Clare MD and Killaloe MD (3.6% and 3% Males, respectively) may be due to the relatively high participation of Males in Agriculture. Young Female participation in the workforce (25-34) exceeded that of Males in all MDs, especially in Ennis MD where Females accounted for 15% of the total workforce compared to 13.3% for Males. It was also noticeable that, in Ennis MD, only 11.3% of the workforce was in the 55-64 age group compared to 17.5% in W. Clare MD. People retired much earlier in Ennis MD than in W. Clare MD.

6.3.5 Employment Growth

The percentage of the County's residents who were employed grew by **58%** in the period 1981-2011 from 28,835 to 45,688, which was far in excess of the County's population growth (**34%**). In the same period, the Female workforce grew by **206%** and the Male workforce grew by **11%**, so that, by 2011, Females accounted for **47%** of the workforce compared to 24% in 1981. As a result, male participation exceeded female participation by 6%. The very rapid feminisation of the workforce was apparent.

6.3.5.1 Workforce Growth in the Municipal Districts

The workforce growth differed significantly across the Municipal Districts. Ennis MD experienced the highest workforce growth (110%), compared to Shannon MD (84%), Killaloe MD (55%) and W. Clare MD (17%). The gender composition of the growth also differed significantly between Ennis MD (Male +54%, Female +239%), Shannon MD (Male +34%, Female +223%), Killaloe MD (Male +9%, Female 222%), W. Clare (Male -20%, Female +159%).

6.3.5.2 Male/Female Participation in the Municipal Districts

The Male workforce exceeded the Female workforce in Ennis MD by only 4% compared to 6% at County level, in Shannon MD by 15%, in Killaloe MD by 22% and in W. Clare MD by 22%. W. Clare MD experienced a 20% decline in its Male workforce. The rate of feminisation of the workforce in Ennis MD was well ahead of that in Shannon, Killaloe and W. Clare MDs.

6.3.6 Sectoral Employment

At county level, the number of workers engaged in the different sectors in 1981 and 2011 showed a 57% decline in the Agriculture sector and a 300% increase in the numbers involved in 'Other' Services sector. The relative importance of the different sectors also changed. While Agriculture accounted for 30% of the workforce in 1981 it accounted for only 8% in 2011. The importance of Manufacturing declined from 21% to 15%, and Construction from 9% to 5%. As a result of the strong shift to Service Sectors (Transport, Public Admin, Professional Services and Other Services) they accounted for 52% of all employment in 2011 compared to 28% in 1981.

Changes in employment, by Sector, were also examined between 2006 and 2011 at the Level of Rural Districts (RDs) and Urban Districts (UDs). In Clare there are two Urban Districts (Ennis and Kilrush) and nine Rural Districts (Kilrush, Kildysart, Ennistymon, Ballyvaughan, Corofin, Meelick, Scariff, Tulla, Ennis). The first four RDs and part of Corofin RD approximate the W. Clare MD. Ennis RD extends south to Shannon and Sixmilebridge and west to the border of Inagh and Lissycasey and approximates Ennis MD. Scariff RD and Tulla RD and part of Meelick RD approximate Killaloe MD. The number of workers living in the different RD and UD in 2011 was as follows: Ennis RD and UD (20,550), Meelick RD (6,300), Kilrush RD and UD (4,570), Ennistymon RD (3,950), Tulla RD (3,150), Scariff RD (2,660), Kildysart RD (1,900), Corofin (1,400) and Ballyvaughan (1,100). The Ennis to Limerick Suburbs reflected in the Ennis RD/UD and Meelick RD accounted for almost 60% of all workers living in the County

Employment declined by 5,000 between 2006 (50,600) and 2011 (45,600) particularly in: Construction (-3,600), Industries not Stated (-1,250), Manufacturing (-1,050), Transport and Communications (-600) and was offset by increased employment in Public and Professional Services (+1,300), Agriculture (+450). Employment in Tourism-related activities, Wholesale/Retail, Community/Social/Personal Services remained constant.

The significance of the different sectors in 2011 is apparent from the percentage of all workers represented by: Professional and Public Services (25%); Manufacturing (15%); Retail/Wholesale (12%); Finance/Real Estate (11%); Agriculture (8%); Transport/Communications (6%); Tourism (7%); Construction (5%) and Community/Social/Personal Services (4%). The balance is made up of 'Not Stated' category.

6.3.6.1 Agricultural Sector

In 1981, the Agriculture sector was the major source of employment in W. Clare MD and Killaloe MD while the Manufacturing sector was the major source of employment in Shannon MD and Ennis MD. However, by 2011, the numbers employed in Agriculture in W. Clare MD were outstripped by the numbers employed in Professional Services, Other Services and Commerce in that order. In Killaloe MD the numbers employed in Agriculture were outstripped by those employed in Professional Services, Commerce and Manufacturing, in that order.

In the period 1981-2011, the number of Farms (by size) declined from 1,227 (< 10 Has), 2,058 (10-20 Has), 3,795 (>20 Has) to 180, 748, 2,501 in the same size categories in 2011. Almost 60% (1,434) of all larger farms (> 20 Has) were located in W. Clare Municipal District in 2011.

The number of farmers increased during the recession period from 3,500 approx. (2006) to 3,950 approx. (2011). This reversed the historical trend on declining farming numbers. However, this may be due to the fact that in the construction period (2002-2006) farmers considered themselves as construction workers firstly and farmers secondly.

In 2011, the highest numbers of farmers and as % of RD's workforce were as follows: Kilrush RD 814 (21%), Ennis RD 665 (4%), Ennistymon RD 538 (14%), Tulla RD 395 (13%), Scariff RD 369 (14%), Kildysart RD 343 (18%), Meelick RD 304 (5%), Corofin RD 251 (18%) and Ballyvaughan RD 217 (20%).

While almost 60% of all workers were living in Ennis RD/UD and Meelick RD, only 25% of Agricultural employment was located there.

6.3.6.2 Construction Sector

Employment in the Construction sector declined by 40% from 6,071 (2006) to 2,475 (2011), thus accounting for 3,600 of the overall 5,000 decline in employment. This percentage decline was approximately reflected across all RDs and UD as follows: Ennis UD/RD declined from 2,476 to 974; in Kilrush UD/RD from 867 to 322; Meelick RD from 674 to 327 and in other RDs from approx. 400 to 160.

In 2011, the highest percentage of a RD's workforce engaged in construction was in the RDs of Kilrush RD, Kildysart RD at 7% each and Ennistymon RD, Scariff RD and Tulla RD at 6% each.

While almost 60% of all workers were living in Ennis RD/UD and Meelick RD, only 50% of Construction employment was located there.

6.3.6.3 Tourism Sector

Employment in the Tourism sector remained stable over the period 2006-2011 at around 3,000 or 7% of the workforce.

In 2011, the highest percentage of a RD's workforce engaged in Tourism was in the RDs of Ballyvaughan (14%), Ennistymon (11%), Ennis RD (7%) and Kilrush RD (6%).

While almost 60% of all workers were living in Ennis RD/UD and Meelick RD, only 38% of Tourism employment was located there.

6.3.6.4 Retail and Wholesale

Employment in Retail and Wholesale remained constant at 5,600 (12% all employment) over the period 2006-2011. The slight decline in Ennis RD/UD of 60 was offset by an increase of 50 in Meelick RD.

In 2011, the highest percentage of a RD's workforce engaged in Retail and Wholesale was in the RDs of Meelick (15%), Ennis (12%), Ennistymon (12%), Kilrush, Corofin, Kildysart and Scariff each 11% with Tulla (10%) and Ballyvaughan (8%)

While almost 60% of all workers were living in Ennis RD/UD and Meelick RD, 62% (3,506) of Retail and Wholesale workers lived there thus indicating an above-average concentration of Retail and Wholesale workers in these areas.

6.3.6.5 Changes in Sectoral Employment

By 2011, the Transport Services, Public Administration Services, Professional Services and Other Services accounted for 54%, 53%, 50% and 51% of all employment in Ennis MD, Shannon MD, Killaloe MD and W. Clare MD, respectively. The transition to the service sectors took place to almost the same extent in all the MDs. However, the weakness of the Manufacturing sector for the resident workforce in W. Clare was compensated for by the strength of the Agriculture sector. The workforce residing in W. Clare MD moved quickly to a services-based employment without going through a manufacturing period.

The 23% increase in the female percentage of the workforce was accounted for by the increased percentage of Females in the 'Professional Services' (10%), Commerce (7%) and 'Other Services' (5%).

At Municipal District level, the largest feminisation of Professional Services took place in Killaloe (+13%) and W. Clare (+11%) and in Other Services in W. Clare MD (+7%). By 2011, Female employment across the four Services Sectors (Transport, Public Admin, Professional Services, Other Services) accounted for 32%, 31%, 30% and 28% of the total workforce, in the MDs of Ennis, W. Clare, Killaloe and Shannon, respectively.

6.3.7 Location of Employment or Jobs

Location of jobs data is drawn from **Place Of Work/School Anonymised Records (POWSCAR)** based on the Census of Population 2011. At one end of the jobs concentration there were twenty nine of Clare's one hundred and fifty two Electoral Divisions (EDs) with more than 200 jobs, accounting for almost 80% of all jobs in the county and at the other end there were 29 EDs with less than 35 Jobs. The latter EDs were mainly located in North and North East Clare. When agricultural jobs were removed there were twenty six EDs with more than 200 Jobs, accounting for 83% of all non-agricultural jobs and there were sixty EDs with less than 35 non-agricultural jobs. The dependence of many Rural EDs on Agricultural jobs was evident.

In 2011 almost 33,000 workers in Clare travelled to work. Three main employment centres provided employment for more than 70% of Clare workers who travelled to work. One centre was that of Ennis, Doora/Quin/ Newmarket where there were 10,000 jobs approximately occupied by Clare Workers. In terms of local employment it is worth noting that more than 50% of these workers lived in the area itself. A second centre was that of Shannon/Cratloe/Sixmilebridge where 7,500 jobs approximately were occupied by Clare workers and another 3,000 approximately by workers who travelled into this centre from outside the County, particularly from Limerick City/County. Again it is worth noting that almost 45% of the Clare workers lived in the area itself. A third centre was located in Limerick City and County where there were 6,500 jobs approximately occupied by Clare Workers.

Many ED's surrounding these centres were heavily dependent on the centres for employment (more than 50% of their commuting workforce). There was a clear pattern that as the distance from the Core increased the percentage of the ED's commuting workforce declined. The first centre had the largest catchment and the third centre the smallest. The first centre drew heavily on the workforce living in the EDs to its North and West.

6.3.8 Unemployment

In addition to those employed, the unemployed represent a potential workforce. Taken together the employed and unemployed represent the Labourforce. The Labourforce Participation Rate represents the percentage of an age group that is in the labourforce. At County level, the Male Labourforce Participation Rate dropped from 73% in 2006 to 69% in 2011 while the Female Labourforce Participation Rate experienced a slight increase. These changes were accompanied by an increase in the Male Unemployment rate from 7% (2006) to 22% (2011) and an increase in Female Unemployment Rate from 8% to 15%. This pattern was reflected across all Municipal Districts with W. Clare MD experiencing the Lowest Male Labourforce Participation Rate in 2011 (67%) and the highest Male Unemployment Rate (24%).

Thirty two EDs experienced Male Unemployment rates between 26% and 46% and thirty two EDs experienced Female Unemployment rates between 18% and 34%. High Male Unemployment rates were generally associated with Towns and Villages, except in the case of North East Clare. High rates of Female unemployment were more closely associated with urban centres. However, there were many urban centres which did not experience either high rates of Male or Female Unemployment.

Drawing on the Live Register, Male and Female Unemployment fell, from a peak in 2011, by 28% and 16%, respectively. In the Social Protection Centres of Ennis, Ennistymon, Kilrush and Tulla, respectively, Male Unemployment fell from its peak by 34%, 18%, 29% and 36% and Female unemployment by 26%, 2%, 15% and 22%.

The 5,000 drop in the numbers at work was accounted for by a decline of 5,300 Males and an increase of 300 more Females.

There is no Annual report of employment at County level. There may be an assumption that changes in the Live Register numbers reflect changes in the Employment numbers and that a decline of 100 in the 'Live Register' is matched by an increase of 100 in the number employed. However, this assumption does not take account of net migration.

The decline of 2,000 in the number of unemployed in the Live Register by the end of 2014 cannot be associated with similar increase in the number of employed. It is more likely that emigration continued while employment increased and that this combination best accounted for the Live Register figures.

6.3.9 Employment and Economy – Key Features

There has been a dramatic shift from a predominantly Male agricultural economy to an increasingly Feminised Services economy with Females constituting 47% of the Workforce. The county's employment rate is in line with the National rate. While the Male Employment rate (64%) is consistent across MDs, the Female rate (56%) varies with Killaloe displaying the lowest rate (53.5%). The educational profile of Females outstrips that of Males. Females display a younger age profile. While these measures are similarly reflected across three MDs, W. Clare lags well behind.

The move to a strongly Services-based economy is apparent in the declining significance of Agriculture (30% employment to 8%) and increasing significance of Professional and Public Services (25%), Retail/Wholesale services (12%), Finance/Real Estate Services (11%) and Tourism Services (7%). However, the relative significance of the different sectors is apparent across the RDs/UDs.

6.4 Education

6.4.1 Education and Unemployment

The higher the educational achievement, the higher the employment rate. The lower the educational achievement, the lower the employment rate. In addition, high educational achievement is associated with low unemployment while low educational achievement is associated with high unemployment. The Unemployment rates in 1996, by the level of Education, indicate that, for the county, those with Lower Secondary or Less, experienced a 17% unemployment rate compared to a 5% unemployment rate for those with 3rd. Level. Ennis MD experienced 21% unemployment rate among the former group and a 3% unemployment rate amongst the latter group. In other words, those with Lower Secondary Education or Less, experienced unemployment rates that are threefold (County) and sevenfold (Ennis MD) those with 3rd. Level education. The situation was almost the same in 2006. It is clear that the lack of education increases the likelihood of unemployment to a very significant degree.

6.4.2 Educational Achievement by Sex

At county level, 16% of Females of working age population have a **3rd Level qualification** compared to 12% of Males. In Ennis MD 18% of Females of working age have 3rd. Level qualifications compared to 15% of Males. In W. Clare MD 13% Females have 3rd. Level qualifications compared to 8% Males.

At County level, 6% of Females of working age have **Primary or Less** compared to 8% of Males. In Ennis MD, 5% of Females of working age have Primary education or Less compared to 6% Males. In W. Clare MD 8% of Females have Primary or Less compared to 11% of Males.

In terms of the percentage of the working age population with **Secondary or Less**, it declined from 42% (2002) to 30% (2011). In Ennis MD it declined from 34% to 25% while in W. Clare MD it declined from 51% to 37%, leaving W. Clare MD 7% above the county average.

Over the period 2002 -2011, the percentage of the working age (15-64) whose education finished with 3rd **Level qualification** increased from 23% to 34% at County Level. In Ennis MD it declined from 29% to 39% and from 16% to 28% in W. Clare MD, leaving it 6% below the County average.

There was a similar pattern in the decline in those with Lower Secondary or Less and an increase in those with Third level, with W. Clare MD displaying the weakest performance in each category.

The EDs, where there was a high percentage (42%-56%) of the population aged 15 -64 with Lower Secondary education and Less, were concentrated in W. Clare MD. The EDs with a low percentage (13%- 19%) of the population with 3rd. Level education were also concentrated in W. Clare MD.

In order to enhance the educational profile of the working age population, the National Reform Programme aims to reduce the percentage of those with Lower Secondary Education in the very young age group (18-24) to 8% from the current level of 10.6%. It also aims to increase the percentage of the population with 3rd. Level qualifications (as measured in the 30-34 age-group) from 50% to 60%.

6.4.3 Education – Key Features

The positive relationship between high educational qualifications and employment as well as the negative relation between low educational qualifications and high unemployment are apparent in Clare. The rapid decrease in those with 3rd. Level education and the rapid decline in those with Lower Secondary or less at County level follows the National pattern. However, the performance of W. Clare MD lags well behind that of Ennis MD, Shannon MD and Killaloe MD.

6.5. Poverty Reduction

6.5.1 Introduction

Poverty and Social Exclusion is measured at both the level of the **Individual** (using the Annual Survey of Income and Living Condition – SILC) and of the **Geographic Community** (Haase Pratschke Affluence/ Deprivation Index using Census of Population Data).

The Objective of the National Reform Programme refers to the SILC data and the individual approach. It sets a target of reducing the **Consistent Poverty** rate from 8.2% of the population to 2% or less by 2020 and reducing the numbers in **Combined Poverty** by a minimum of 200,000.

People in **Consistent Poverty** are defined as people who are:

1. at risk of Income Poverty (their Incomes are less than 60% of the Income of the middle people in the State – median Income) and are also
2. unable to purchase at least two items from a list of 11 of what are described as ‘the norm for people in society’

People in **Combined Poverty** are defined as people who are either at ‘Risk of Poverty’ or experiencing ‘Poverty Deprivation’ or experiencing ‘Consistent Poverty’. The target of 200,000 will be achieved by the combination of the reductions in these categories.

In order to estimate 60% of the median Income, the total household income is calculated from survey data. In order to allow for the economies of scale in a household, each adult after the first is considered as 0.66 adult and each child under 14 year as 0.33 adult. This provides an estimate of equivalised individual income.

6.5.2 People 'At Risk of Income Poverty', 'Deprived', in 'Consistent Poverty'

6.5.2.1 Unemployed

Between 2008 and 2013, people 'At Risk of Income Poverty' rate (whose Income was less than 60% of the median Income) increased from 14.4% to 15.2% although falling from 16.5% in 2012. However it still affected more than one in seven people. One in three people who were '**Unemployed**' or 'Renting below market rate' were 'At Risk of Income Poverty'. Unemployment places people at much greater risk of Income Poverty. See section 6.3.8 for the number and location of both Males and Females who are unemployed.

6.5.2.2 Lone Parents

Over the same period, the 'Deprivation Poverty' rate (people unable to afford two or more items considered 'the norm' in society) more than doubled from 13.7% to 30.5% showing a 3% increase since 2012. Almost two in every three people who were '**Lone Parents** where there was a child or children less than 18 years', experienced Deprivation Poverty', while one in every two people who were 'Renting below Market rate' did so. In Clare in 2011, 'Lone Parents' were predominantly Female (80%). In the urban centres of Ennis, Shannon, Kilrush, Ennistymon, Milltown, Killaloe, Mountshannon, Scariff, Newmarket and other smaller settlements more than 20% of all families with a child less than 15 years, were headed by a Lone Parent.

People experiencing 'Consistent Poverty' (both 'Income Poverty' and 'Deprivation Poverty') increased from 4.2% to 8.2% over the same period and showed a 0.5% since 2012. The 'Consistent Poverty' rate increased to 23.9% for the people who were **Unemployed** and to 23% for people who were **Lone Parents** and to 22.9% for people who were 'Renting at or below market rates'.

6.5.3 Income Inequality

'Income Inequality' is measured by comparing the income of the fifth of the population with the highest incomes to the income of the fifth with lowest income. It increased from 4.5 times to 4.8 times although falling from 5 times in 2012.

6.5.4 Community or Spatial Inequality

A measure of Community or Spatial inequality has been developed by combining a number Census-based measures, namely, **Unemployment** - Male and Female (2), **Class** - High and Low (2), **Education** - No more than Primary Education and 3rd Level (2), Number of **Rooms** per person (1), **Lone Parents** (1), **Population change** over previous Census (1), **Age Dependency** (1). This measure is known as the Haase Pratschke Affluence/Deprivation Index and it gives a score for each ED, MD and for the County and Country.

6.5.4.1 The components of the Haase Pratschke Affluence/Deprivation Score

6.5.4.1.1 Unemployment

The Male and Female Unemployment components of the Haase Pratschke Index have been discussed earlier and the concentration of Unemployment in urban settlements was noted. The more urban location of Female unemployment was also noted. Particularly high rates of unemployment occur among those with low education qualifications and this can be exacerbated among certain social/ethnic groups such as Roma and Travellers and people who have been born outside Ireland and who may find it difficult to integrate into the labour market and/or the educational system. Members of the Traveller community are concentrated in Ennis and Environs (550), Shannon (100) and Ennistymon (100) and experience unemployment rates in excess of 80%.

6.5.4.1.2 Class

An examination of the concentration and location of High Class in the County indicates that of the 31 EDs with more than 43% of population in High Class, sixteen were located in Killaloe MD, six in Ennis MD, five in W. Clare MD and two in Shannon MD. EDs of Low Class were predominantly located in Killaloe MD and W. Clare MD.

6.5.4.1.3 Educational Qualifications

The Male and Female Educational components of the Haase Pratschke Index have been discussed earlier, particularly the location of people with Primary only and with 3rd. Level. It was noted that those EDs with a high level of Primary or Less and low levels of 3rd. Level were located principally in W. Clare MD.

6.5.4.1.4 Rooms per person

Houses with the smallest number of rooms per person are located in rural areas and are particularly located in South West Clare and South East Clare.

6.5.4.1.5 Lone Parents

The concentration and location of Lone Parent families was discussed in 6.5.2.2

6.5.4.1.6 Population Change 2006-2011

Population decline of more than 4% occurred in thirty four EDs in Clare in the period 2006-2011. Twenty two of these were located in W. Clare MD, Five in Killaloe MD, Five in Ennis MD and two in Shannon MD.

6.5.4.1.7 Age Dependency

There are two components of Age dependency, namely the percentage of the population 0-14 years and 65+ years. At county level one third of people 65+ live alone and these form more than one in every seven households in 35 EDs, 27 of which are located in W. Clare MD. Another third live in 2-person households where both persons are 65+. There are 29 EDs where more than one in twelve households have such composition. 23 of these EDs are located in W. Clare MD.

6.5.4.1.8 Deprived EDs

When the components discussed above are aggregated a score is derived for each ED. Of the fifteen most deprived EDs in Clare, thirteen are in W. Clare MD. The other two are in Ennis Urban1 and 2 in Ennis MD.

The most Deprived MD is W. Clare. It has a score of - 10.9 compared to a county average of -7.2. Shannon MD is next most deprived (-6.1) with Killaloe MD slightly better off than Ennis MD with scores of - 5.4 and - 5.5 respectively.

6.5.5 Poverty Reduction - Key Features

Lone Parents, People who are unemployed, People who are Renting below Market Rate, Members of social/ethnic groups (e.g. Roma, Travellers, People experiencing difficulty integrating into the labour market and/or the education system), People with Low Educational qualifications are at particular risk of Income Poverty, Material Deprivation and Consistent Poverty.

Communities that experience multiple deprivation in the form of: Low Education; Low number of Rooms per person; Low Class; High Unemployment; High inter-censal Population decline; High levels of Lone Parenting and High Age Dependency' are particularly deprived and people living in such communities are at much greater risk of experiencing individual deprivation.

6.6 Research, Development and Innovation

Business expenditure on R/D (BERD) in the Mid-West Region is equivalent to 12% of all such National Expenditure. However, it is limited to a small number of companies. Research, Development and Innovation (RDI) is essential to a thriving, export-oriented economy whose supply chain extends into indigenous and foreign enterprises located proximate to it. RDI is highly dependent on: a critical mass of leading export-oriented enterprises, particularly in the modern manufacturing and services sectors and sub-sectors; proximity to 3rd. Level institutes engaged in cutting edge research and its commercialisation; connectivity in the form of Broadband, Road/Rail infrastructure and Air transport. While Clare is very well located in terms of many of these factors, the absence of an adequate Broadband infrastructure impacts negatively on the County's potential to exploit its RDI advantages.

6.7. Climate Change and Energy

County Clare has 120MW of renewable energy installed and another 270MW under construction or in planning.

Total Final Consumption of Energy in Clare increased from 2,200GWh in 1990 to 3,700GWh in 2012. Of this, renewable energy constituted 34 GWh (1.5%) in 1990 and 108GWh (2.9%) in 2012

Clare has a target of Total Energy Consumption of 4,000GWh in 2020 and aims to provide 334GWh (8.4%) by way of Renewable Energy under the assumption of 'Business as Usual' or 668GWh (18.3%) under the assumption that specific measures will be implemented to achieve this target.

Note: The Socio-Economic Evidence-Base section of this report is also available on www.clarecoco.ie and includes maps, tables and charts.

7. Socio-Economic Statement and High level goals

7.1 Vision

'A County where people want to live and work sustainably and visit because of its unique quality of life. An inclusive County of sustainable communities where each have respect for their environment, a sense of awareness of place, a sense of shared purpose and a sense of civic pride'.

7.2 Theme: Employment, Enterprise & Economic Development

Goal 1: to create high quality employment opportunities for the people of County Clare

Goal 2: to create a pro-business environment which will encourage entrepreneurs to develop and grow their businesses

Goal 3: to ensure that income levels in the county are at a standard that maintains a good quality of life for the people of County Clare

Goal 4: to ensure that economic opportunities are identified, examined and implemented so that they have maximum benefit to County Clare from an investment, job creation and disposable income perspective

Goal 5: to ensure that enterprise development is supported and that County Clare is positioned to attract suitable types of enterprise to the County

Goal 6: to ensure that towns and villages in the County are positioned to advance rural economic regeneration

Goal 7: to ensure that local and community development programmes support the development of micro-enterprise in the County

Goal 8: to ensure that childcare services, supports and incentives are available to those who wish to access employment and/or employment/training opportunities including self-employment

Goal 9: to ensure that Tourism opportunities are identified, supported and developed to the benefit of local areas and the county in general

Goal 10: to ensure that County Clare is marketed and promoted as a destination of choice

Goal 11: to ensure that County Clare maintains good connectivity domestically, nationally and internationally and that road, rail and ICT infrastructure, public transport, sea and air transport are maintained and developed

Goal 12: to ensure that the changing dynamic of agriculture is recognised and that appropriate supports and incentives are available which will encourage diversification and enterprise

Goal 13: to work with the Regional Economic Forum, relevant state agencies and stakeholders in order to identify opportunities for economic development in the Region with a particular focus on the development of Micro, Small and Medium and Large enterprises

7.3 Theme: Community and Personal Wellbeing

Goal 1: to ensure that all local and community development programmes operating in the County are for the benefit of those 'at risk' of poverty and/or experiencing 'basic deprivation' and/or living in 'deprived communities'

Goal 2: to ensure that appropriate measures are taken to address the needs of disadvantaged communities and that targeted interventions are available to those most in need

Goal 3: to ensure that the community and voluntary, social inclusion and environmental sectors are developed and supported so that they can input into policy formulation and play a meaningful role in enhancing the quality of life and well-being of communities

Goal 4: to promote quality of life and general well-being of all Communities

Goal 5: to support and feed into the work of the Joint Policing Committee in the areas of crime prevention and protection of vulnerable members of communities

Goal 6: to pursue labour market activation schemes that will benefit the long-term unemployed

Goal 7: to ensure that the Local Development Strategy reflects the needs of the County and that targeted interventions and supports are made available to individuals and community groups

Goal 8: to promote and support place-making initiatives which will enhance our towns and villages

Goal 9: to support rural transport initiatives in the County that complement existing public and private transport services

Goal 10: to ensure that a high quality ICT infrastructure including broadband is available to all parts of the county

7.4 Theme: Education & Training

Goal 1: to ensure that County Clare possesses a highly skilled and well educated workforce capable of competing for job opportunities at all levels

Goal 2: to ensure that high participation rates are achieved in the County at both 2nd and 3rd level education

Goal 3: to ensure that childcare services, supports and incentives are available to those who wish to access further and higher education

Goal 4: to ensure that targeted educational and developmental interventions are available to children and young people

7.5 Theme: Research and Development

Goal 1: to work in partnership with third level institutions in order to exploit R & D opportunities for the benefit of the County

Goal 2: to attract EU investment to the County such as the Urban Development Fund which will enable the delivery of the Plan

Goal 3: to develop collaborative networks of sufficient scale to attract R & D investment and linkage with third level institutions

Goal 4: to maximise opportunities for increased spin-off from existing R & D by way of supply chain activity

7.6 Theme: Climate Change and Energy

Goal 1: to support industry that promotes energy efficiency in the construction, transport and energy generating sectors

Goal 2: to promote renewable energy production on land and off-shore by a range of appropriate technologies

8. Appendices

Members of the Clare Local Community Development Committee

Interest	Name
Elected Members (4)	Cllr. J Flynn Cllr. B Chambers Cllr. M McKee Cllr. R. Nagle
Chief Executive (1)	Tom Coughlan
Head of Enterprise (1)	Vacant
Stage Agencies:	
Health Service Executive (1)	Esther Connellan
Department of Social Protection (1)	Jim Lynch
Education & Training Board (1)	Aobhan Haverty
Community and voluntary interests (2)	Cillian Murphy Christy Leyden
Social inclusion interests (2)	Dermot Hayes Mary O'Donoghue
Environment interests (1)	Martin McKeown
Clare Local Development Company (1)	Doirin Graham
Agricultural sector (1)	Andrew Dundas
Youth sector (1)	Margaret Slattery
Employers/Business (1)	Helen Downes
Age Friendly Alliance Board (1)	Gerry Kelly

Members of the Economic Development & Enterprise Strategic Policy Committee – Clare County Council

Interest	Name
Elected Members (6)	Cllr. Richard Nagle
	Cllr. P J Ryan
	Cllr. Gabriel Keating
	Cllr. Clare Colleran Molloy
	Cllr. Ian Lynch
	Cllr. Pat McMahon
	Cllr. Johnny Flynn
Development/Construction (1)	Mr. Pat Morris
Agriculture/Farming (1)	Mr. William Hanrahan
Business/Commercial Sector (1)	Ms. Dympna O’Callaghan
Environment/Conservation (1)	Ms. Theresa O’Donohoe