



DRAFT LEITRIM COUNTY DEVELOPMENT PLAN 2023 – 2029 – APPENDIX II
ECONOMIC PROFILE OF CO. LEITRIM BASED ON 2016 CENSUS OF POPULATION



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1 HEADLINES FROM 2016 CENSUS OF POPULATION

The following headlines emerge from an analysis of the 2016 Census of Population POWSCAR data for Co. Leitrim:

- **461** no. reduction in number of persons employed in County Leitrim 2011-2016
- **565** no. decline in the number of persons at work in the information and communication, financial, real estate, professional, administration and support service activities sector between 2011-2016
- **340** no. decline in the number employed in the County's principal town, Carrick-on-Shannon
- **0.24** jobs to population ratio in 2016, down from 0.25 in 2011 (0.41 State 2016)
- **44%** outbound commuter rate in 2016, up from 40% in 2011
- **301** outbound commuters to the Dublin Region in 2016

The analysis highlights the scale of the challenge to provide more jobs for the resident population. The 2016 Census figures indicated a significant fall in the number of jobs available in Co. Leitrim. The number of persons employed in Leitrim fell by 461 between 2011 – 2016 (5.73%) during which the population experienced a low level of growth (0.77%). The extent of residents commuting out of the county for employment is increasing whilst the number of people from outside the county who work here is falling reflecting the decrease in the number of jobs available in the county. The challenge from an employment perspective is to reverse these unsustainable commuter trends. The analysis also shows the continued relative strength of indigenous employers. Challenges such as the potential impact on Foreign Direct Investment resulting from international uncertainty surrounding the fall out over 'Brexit' and any long lasting effects from Covid 19 will also need to be addressed.

2 OVERVIEW OF LABOUR MARKET

The number of persons at work within the County has fallen from 8,042 in 2011 to 7,581 in 2016, a reduction of 5.7% at a time when the national economy was recovering and employment in the State had grown by 11%. The decline in employment has been driven by a marked reduction in FDI employment and specifically in the former MBNA facility in Carrick on Shannon.

Table 1: Relationship between Employment and Commuting in Co. Leitrim (2011-2016)

Categories of Persons Employed	Persons Employed			
	Census Year		Change 2011-2016	
	2011	2016	Absolute	%
Working and Living in Co. Leitrim	5,548	5,397	-151	-2.7%
Working in Co. Leitrim but living elsewhere – Inbound Commuters	2,494	2,184	-310	-12.4%
Total Working in Co. Leitrim	8,042	7,581	-461	-5.7%
Living in Co. Leitrim but working elsewhere – Outbound Commuters	3,771	4,208	437	11.6%

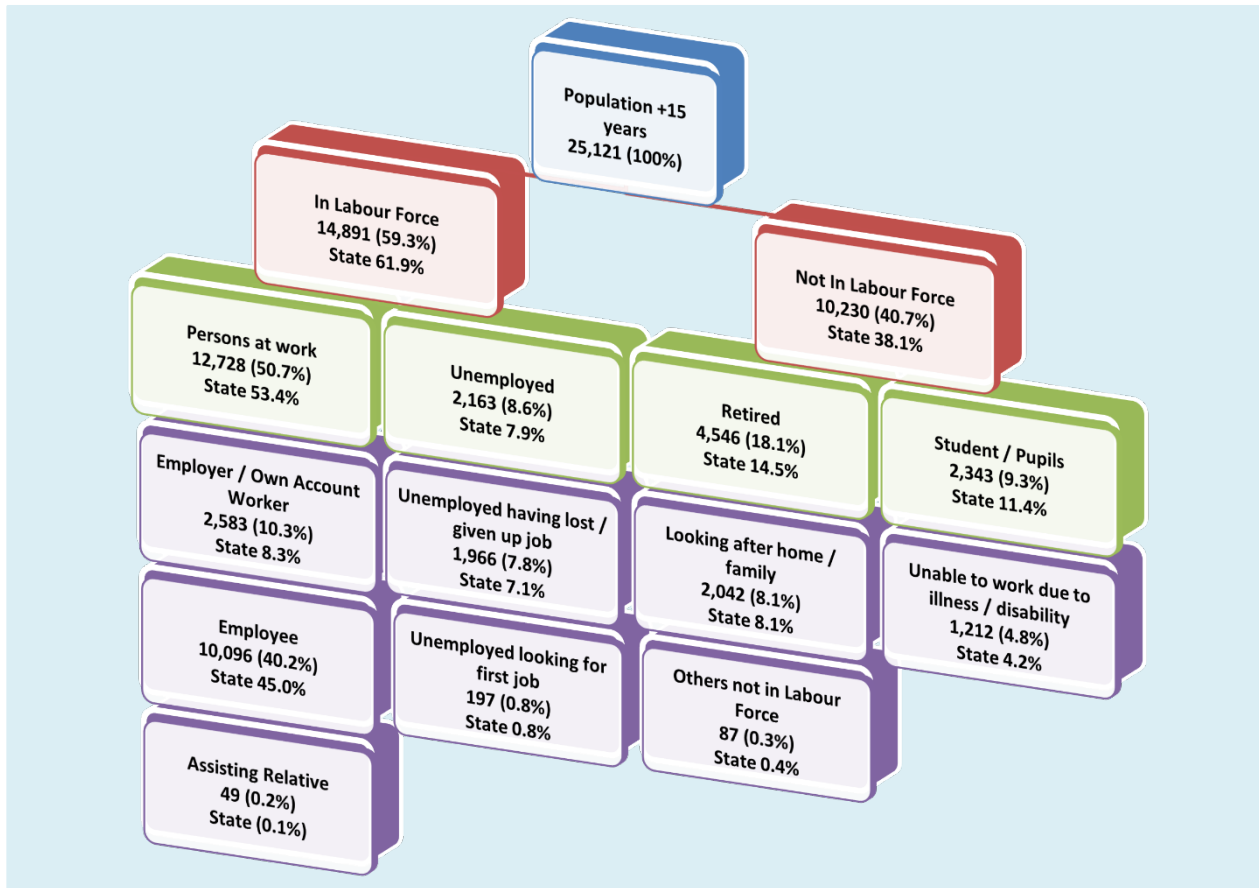
Source: Census of Population 2011-2016 POWSCAR data

3 PRINCIPAL ECONOMIC STATUS

Around 60% of the county's adults were in the labour force in 2016 either working or looking for work, slightly below the national average. The 14,891 people in the county's labour force was 0.9% below

the 2011 figure (compared with 3.2% growth nationally); Leitrim is one of only six counties where the labour force shrank. Half (50.7%) of the county’s adults were ‘at work’, below the 53.4% national average; the share of persons unemployed is notably higher than average. The county’s labour force differs most strongly from the national pattern in self-employment (employer/own account worker) with Leitrim having a far higher share; 10.3% compared with 8.3%. Figure 1 below presents these findings.

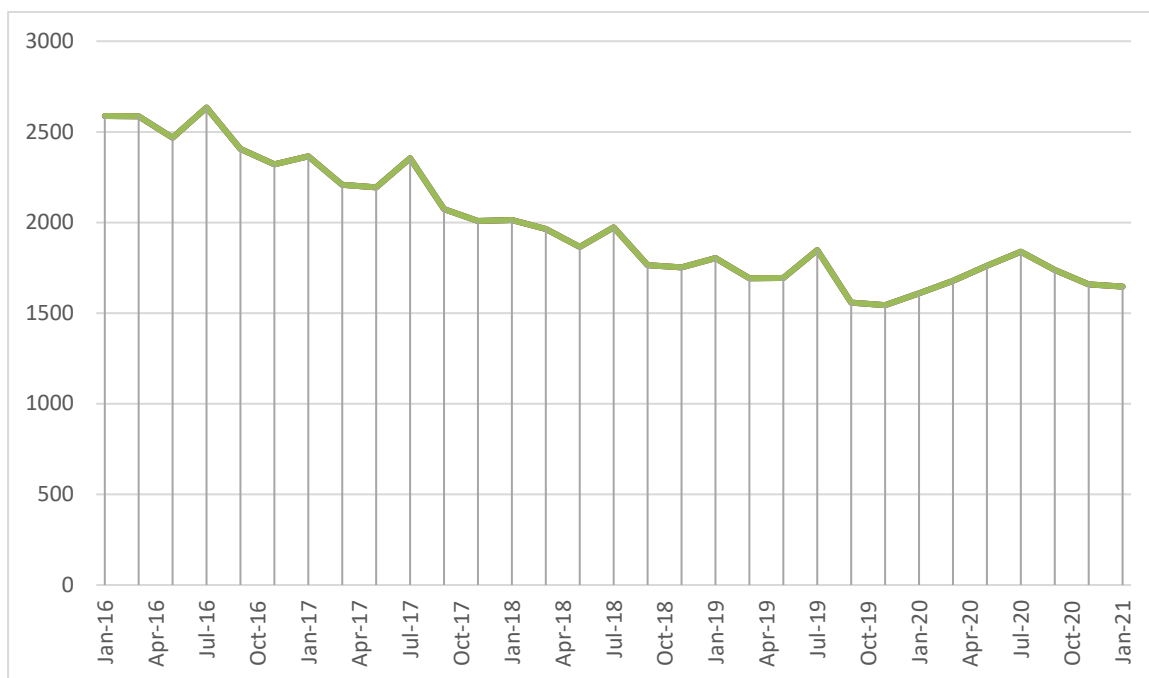
Figure 1: Population of County Leitrim Aged 15 years and over by Principal and Labour Force Status



Source: Western Development Commission

For the 40% of adults outside the labour force, the group classed as ‘retired’ was the largest accounting for a considerably higher than average share (18.1% compared with 14.5% in the State), reflecting the county’s older age profile. Leitrim also has a higher share unable to work due to disability/ illness but a lower share of students/pupils, influenced by the absence of a third level institution in the county.

Figure 2: Number of People on the Live Register in County Leitrim Jan 2016 – Jan 2021



The number of people on the Live Register¹ was 2,588 persons in January 2016 when the last County Development Plan was adopted. This fell to a low of 1,544 persons in November 2019 before the onset of Covid 19. It is also worth remembering that the corresponding figure for August 2011 for County Leitrim was 3,885 persons. The overall trend over the past decade, excluding the effects of Covid 19, has been positive.

4 COMMUTING PATTERNS

The number of people living in Leitrim but working outside of the county (outbound commuters) grew strongly between 2011 - 2016 (437 persons or 11.6%). The outbound commuting rate increased from 40% in 2011 to 44% in 2016 (See Table 2). This reflects the relatively small size of our urban centres in comparison to larger adjoining urban centres where regional employment is concentrated, most notably in Sligo. The other principal outbound work locations for our residents are Longford, Cavan and Roscommon. Dublin is proving to be a significant attractor with the overall number of persons employed in the Dublin region (4 Local Authority areas) recorded at 301. It is likely that the Dublin region will become more important in the advent of remote working or blended working becoming part of normal working practices in certain sectors. The number of people living in Leitrim commuting across the border into Northern Ireland also increased slightly to 133 no. persons in 2016 from 119 no. persons in 2011 with Fermanagh (103 no.) the main employment destination.

Table 3 indicates a fall in the number of inbound commuters from all originating destinations between 2011 – 2016 which is linked to the reduction in employment opportunities in Leitrim. Roscommon is the main originating county for inbound commuters which is not surprising having regard to the proximity to the main employment centre in Leitrim, namely Carrick on Shannon.²

¹ The Live Register is not designed to measure unemployment. It includes part-time (those who work up to three days a week), seasonal and casual workers entitled to Jobseekers Benefit or Jobseekers Allowance.

² POWSCAR does not include information on inbound commuters from Northern Ireland or other locations outside of Ireland.

Table 2: Persons living in Leitrim and working outside of the County (2011-2016)

Place of Work	2011		2016		Change 2011 - 2016	
	Number	%	Number	%	Absolute	%
Sligo	1,396	37.0	1,470	34.9	74	5.3
Longford	475	12.6	582	13.8	107	22.5
Cavan	424	11.2	464	11.0	40	9.4
Roscommon	403	10.7	491	11.7	88	21.8
Donegal	370	9.8	361	8.6	-9	-2.4
Dublin City	160	4.2	173	4.1	13	8.1
Fermanagh	101	2.7	103	2.4	2	2.0
Westmeath	95	2.5	112	2.7	17	17.9
Mayo	42	1.1	44	1.0	2	4.8
Rest	305	8.1	408	9.7	103	33.8
Total	3,771	100	4,208	100	437	11.6

Table 3: Persons living outside of Leitrim but working in County Leitrim (2011-2016)

Place of Residence	2011		2016		Change 2011 - 2016	
	Number	%	Number	%	Absolute	%
Roscommon	1,164	46.7	1,084	49.6	-80	-6.9
Sligo	520	20.9	466	21.3	-54	-10.4
Longford	274	11.0	183	8.4	-91	-33.2
Cavan	198	7.9	167	7.6	-31	-15.7
Donegal	196	7.9	156	7.1	-40	-20.4
Total	142	5.7	128	5.9	-14	-9.9
Total	2,494	100	2,184	100	-310	-12.4

Source Table 2 and 3: Census of Population 2011-2016 POWSCAR data

The number of persons at work within the County aged between 20-44 years fell strongly from 4,444 in 2011 to 3,837 in 2016, whereas the corresponding number of people aged 45-64 years has grown from 3,292 to 3,417, reflecting the ageing of the working population in Leitrim. The age profile of persons both living and working in Leitrim and those travelling into the County to work from elsewhere tends to be older compared with the country as a whole. Noteworthy are the outbound commuters, who have a lower age profile *vis-à-vis* the State: the proportion of outbound commuters aged 20-44 years is higher than that in the State in 2011 and 2016, and the percentage of outbound commuters aged 45-64 years is lower compared with the country as a whole in both years.

5 JOBS TO POPULATION RATIO

Table 4 shows that the jobs to population ratio is very low in Leitrim (0.24) compared to that of the State (0.41). The ratio has fallen since 2011 as has the proportion of Leitrim's share of national employment. The small jobs to population ratio reflect Leitrim being a county with comparably high outbound commuting and a location reliant to a large extent on regional economic performance.

Table 4: Jobs to Population Ratio in Co. Leitrim compared to the State (2011-2016)

	Persons Employed		Population		Jobs / Pop Ratio		
	2011	2016	2011	2016	2011	2016	% Change
County Leitrim	8,042	7,581	31,798	32,044	0.25	0.24	-6.5
State	1,770,644	1,970,738	4,588,252	4,761,865	0.39	0.41	7.2
Co. Leitrim share of State	0.45%	0.38%	0.69%	0.67%			

Source: Census of Population 2011-2016 POWSCAR data

6 THIRD LEVEL/HIGHER EDUCATIONAL ATTAINMENT

There is evidence of noticeable improvement among those both living and working in Leitrim regarding the level of education attained. However, the educational attainment of those both living and working in the County remains lower than that of both the inbound and outbound commuters in 2011. (See Table 5).

Table 5: Third Level / Higher Educational Attainment of Persons Employed in Leitrim and Persons from Leitrim Employed elsewhere

Key Economic Variable	Persons Employed (2011)					Persons Employed (2016)				
	Working and Living in Leitrim	Inbound Commuters	Outbound Commuters	Total Employment within Leitrim	Leitrim Employment and Outbound Commuters	Working and Living in Leitrim	Inbound Commuters	Outbound Commuters	Total Employment within Leitrim	Leitrim Employment and Outbound Commuters
Persons at Work	5,548	2,494	3,771	8,042	11,813	5,397	2,184	4,208	7,581	11,789
Persons with Third Level / Higher Education	1,416	916	1,663	2,332	3,995	2,363	1,261	2,644	3,624	6,268
% Persons	25.5	36.7	44.1	29.0	33.8	43.8	57.7	62.8	47.8	53.2
% State (Comparison)	34.8					51.5				

In 2011, 1,416 (25.5%) of the persons both living and working in the County had attained a third-level or higher education qualification compared with 35% in respect of persons at work in the State. However, in 2016, the number of people both living and working in Leitrim with this form of educational attainment increased very strongly to 2,363 (43.8%). While there remains a gap in educational attainment between these workers in Leitrim and those at work in the State in 2016, the gap has narrowed.

The proportion of professional (higher and lower), non-manual and manual skilled workers among the outbound commuters exceeded the corresponding proportions for the country in both 2011 and 2016, and the number of outbound commuters in each case has grown during the period. This further illustrates the particularly talented nature of the outbound commuters, who need to acquire strong

human capital characteristics to compete for and secure employment further away from their places of residence where demand for skilled employment is higher.

7 SOCIO ECONOMIC GROUPS OF PERSONS AT WORK

3 sectors were identified by PMCA Consultants in their commission as having potential to increase their contribution towards overall employment within Leitrim. It was considered that there was potential to increase the number of jobs in Co. Leitrim by 1,000 to cater for the projected increase level of population to be attracted to the County by 2031. The main sectors identified to provide this employment were Information & Communication, Financial, Professional, Administration & Support and Service Activities. These sectors are highlighted in Table 6 overleaf.

1. Manufacturing, mining and quarrying, electricity, gas, water supply and waste management – this sector accounted for 831 persons at work in Leitrim in 2011, or 10.3% of all employment in the County. In 2016, the number of persons at work in this sector increased strongly to 1,018 (by 23%) and the sector accounted for an increased share of all employment in Leitrim (13.4%).
2. Wholesale, retail trade, transportation and storage, accommodation and food service activities – this sector saw a very small reduction in persons employed within Leitrim (from 1,898 in 2011 to 1,883 in 2016, a drop of just 1% but the sector's overall share of all employment in the County has increased (from 23.6% in 2011 to 24.8% in 2016).
3. Information and communication, financial, real estate, professional, administration and support service activities - this sector entails the key activities of ICT, financial, business and professional services that have been and are growing strongly in Ireland, including in regard to FDI (e.g. fintech and payments, etc.). In 2011, there were 1,438 persons at work in this sector, representing 18% of all employment in the County. Undoubtedly the employment contribution at the former MBNA facility in Carrick-on-Shannon was important in accounting for Leitrim's 18% employment share for the sector. However, since 2011, employment in this sector has fallen dramatically in Leitrim to 873 persons in 2016, representing a decline of almost 40%. Accordingly, the share of all employment within Leitrim due to this important, knowledge-oriented sector has fallen from the 18% in 2011 to just 11.5% in 2016, well below the corresponding proportion for the State in the latter year, 19%.

Table 6: Composition of Employment within Leitrim by Sector 2011 and 2016

Sector	Year		Change 2011 - 2016	
	2011	2016	Absolute	%
Agricultural, Forestry & Fishing	665	594	-71	-10.7
Manufacturing, Mining and Quarrying, Electricity, Gas, Water Supply and Waste Management	831	1,018	187	22.5
Construction	154	175	21	13.6
Wholesale, Retail Trade, Transportation / Storage, Accommodation and Food Service Activities	1,898	1,883	-15	-0.8
Information and Communication, Financial, Real Estate, Professional, Administration and Support Service Activities	1,438	873	-565	-39.3
Public Administration and Defence / Compulsory Social Security	777	804	27	3.5
Education, Human Health and Social Work Activities	1,831	1,753	-78	-4.3
Other Service Activities	323	367	44	13.6
Not Stated	125	114	-11	-8.8
Total	8,042	7,581	-461	-5.7

Table 6 also shows the high reliance of Leitrim on public sector employment, within which the number of jobs in public administration and defence; compulsory social security has grown mildly (by 3% between 2011 and 2016) but the level of employment in the sector education, human health and social work activities fell by slightly more proportionately (4%).

8 EMPLOYMENT IN SELECTED TOWNS IN 2011 AND 2016

Table 7 shows that the main towns together accounted for 5,155 jobs or 68% of all employment within the County in 2016, down by 442 on the number recorded in 2011. It is worth recalling that the overall drop in employment in Leitrim during the period was 461. The overall jobs loss during the period was heavily concentrated in the main towns of the County. In this regard, the main loss occurred in Carrick-on-Shannon, with the loss of 340 jobs during the period. Of these job losses, 187 were lost among persons both living and working in Leitrim and 153 among the inbound commuters. It is likely that the job losses in the County's principal employment centre were concentrated at the former MBNA facility.

Table 7: Employment in Selected Towns / Key Villages in 2011 and 2016

Key Economic Variable	Persons Employed (2011)					Persons Employed (2016)				
	Working and Living in Leitrim	Inbound Commuters	Outbound Commuters	Total Employment within Leitrim	Leitrim Employment and Outbound Commuters	Working and Living in Leitrim	Inbound Commuters	Outbound Commuters	Total Employment within Leitrim	Leitrim Employment and Outbound Commuters
Persons at Work	5,548	2,494	3,771	8,042	11,813	5,397	2,184	4,208	7,581	11,789
Carrick on Shannon³ <i>% Persons at Work</i>	1,756 31.7%	1,245 49.9%	310 8.2%	3,001 37.3%	3,311 28.0%	1,569 29.1%	1,092 50.0%	344 8.2%	2,661 35.1%	3,005 25.5%
Manorhamilton <i>% Persons at Work</i>	671 12.1%	428 17.2%	142 3.8%	1,099 13.7%	1,241 10.5%	693 12.8%	325 14.9%	168 4.0%	1,018 13.4%	1,186 10.1%
Ballinamore <i>% Persons at Work</i>	289 5.2%	58 2.3%	66 1.8%	347 4.3%	413 3.5%	273 5.1%	43 2.0%	87 2.1%	316 4.2%	403 3.4%
Mohill <i>% Persons at Work</i>	371 6.7%	74 3.0%	53 1.4%	445 5.5%	498 4.2%	344 6.4%	67 3.1%	63 1.5%	411 5.4%	474 4.0%
Drumshanbo <i>% Persons at Work</i>	314 5.7%	74 3.0%	44 1.2%	388 4.8%	432 3.7%	361 6.7%	67 3.1%	60 1.4%	428 5.6%	488 4.1%
Kinlough <i>% Persons at Work</i>	63 1.1%	25 1.0%	243 6.4%	88 1.1%	331 2.8%	72 1.3%	28 1.3%	227 4.5%	100 1.3%	327 2.8%
Dromahair <i>% Persons at Work</i>	80 1.4%	27 1.1%	213 5.6%	107 1.3%	320 2.7%	80 1.5%	30 1.4%	215 5.1%	110 1.5%	325 2.8%
Carrigallen <i>% Persons at Work</i>	98 1.8%	24 1.0%	42 1.1%	122 1.5%	164 1.4%	87 1.6%	24 1.1%	63 1.5%	111 1.5%	174 1.5%
Total Selected Towns <i>% Persons at Work</i>	3,642 65.6%	1,955 78.4%	1,113 29.5%	5,597 69.6%	6,710 56.8%	3,479 64.5%	1,676 76.7%	1,227 29.2%	5,155 68.0%	6,382 51.1%

9 AGENCY SUPPORTED EMPLOYMENT

The following tables outline the total number of jobs in IDA Ireland client companies and jobs in companies supported by Enterprise Ireland in Leitrim which includes the period since the previous County Development Plan took effect in 2015. Table 8 which indicates the number of persons employed in IDA Ireland Client Companies spans over a decade to outline the degree of fluctuation over the longer term.

³ This relates to the extent of Carrick on Shannon census town located in County Leitrim, it excludes Cortober.

Table 8: Number of Persons Employed in IDA Ireland Client Companies in Leitrim 2010-2020

Year	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Persons Employed	1,161	1,017	856	606	682	745	803	884	909	948	966
No. of Companies Supported	6	5	5	5	5	5	5	5	5	5	5

Source: IDA Ireland (Annual Employment Survey)

The sectors in which the IDA supported companies operate are Financial Services, Engineering/Manufacturing and Medical Devices.

Table 9: Number of Persons Employed in Enterprise Ireland Supported Companies in Leitrim 2014-2019

Year	2014	2015	2016	2017	2018	2019	2020
Number of Companies	35	33	29	25	22	22	23
Persons Employed	722	820	922	559	607	610	585

Source: Enterprise Ireland (Annual Employment Survey)

Enterprise Ireland supported 6 companies in 2019 to the amount of €137,000 financial assistance.

The figures for both IDA Ireland and Enterprise Ireland relate to permanent full-time jobs and other employment. In 2016, these jobs accounted for 22.75% of all persons employed in Leitrim. A positive picture is evident in respect of total number of persons employed in IDA Ireland and Enterprise Ireland supported companies – since the last County Development Plan was adopted, on average, 1,560 persons have been employed in such companies. The importance of the companies supported by both agencies cannot therefore be overstated.

The number of persons employed in IDA Ireland supported companies has increased each year since 2013 although the figure in 2020 is still below that recorded in 2010, accounted largely by the loss of MBNA but being offset over time by increasing employment provided by VisatMed and AvantCard both in Carrick on Shannon. In relation to the total number of persons employed in Enterprise Ireland supported companies, there is greater fluctuation with the numbers employed in 2020 being significantly less than the numbers employed in 2016. It should also be noted that companies supported by Enterprise Ireland may transfer to IDA Ireland and this is understood to account for some of the fluctuation.