

# **The Donegal Local Economic & Community Plan 2016-2022**

## **Appendix 1**

### **The Profile of the County**

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## Chapter 1: Donegal, A Unique & Connected Place

### 1.0 Defining Donegal

To appreciate Donegal's present socio economic picture, it is important to understand its evolution and a good starting point is by understanding its geography. County Donegal is located in the Border Region and is bounded on the southwest, west and north by the Atlantic Ocean<sup>1</sup> and on the east by counties Derry, Tyrone, Fermanagh and Leitrim. County Donegal shares 93% of its entire land boundary with Northern Ireland and the remaining 7% (or 9km stretch) is with County Leitrim at its most southerly point. County Donegal is the fourth largest County in the State with a land mass of 4,861 sq kms or 6.9% of the total land area of the State. The landscape is varied and dramatic, comprising of mountains, valleys, and fertile plains with a deeply indented coastline forming natural sea loughs, bays, peninsulas and many islands both inhabited and uninhabited.

Donegal is the most northerly county in Ireland. Despite improvements and investment in transportation and communications in recent decades, this corner of Ireland has managed to retain much of its rich and unique cultural identity. How we speak, how we celebrate our traditions, how communities have carved out an existence in some of the most remote and inhospitable locations in Europe are all features of life in Donegal which are as relevant today as they were centuries ago. How we have defended our lands in the past, how we have influenced and have been influenced by new immigrants, such as Planters, the Celts, the coming of Christianity and how invaders such as the Vikings and the Normans have shaped our place and our way of life, how our coastal waters were used as important shipping routes, how we farmed, fished and travelled, have all left us with a unique legacy upon which we must build a socially, economically and environmentally sustainable community.

#### The Gateway

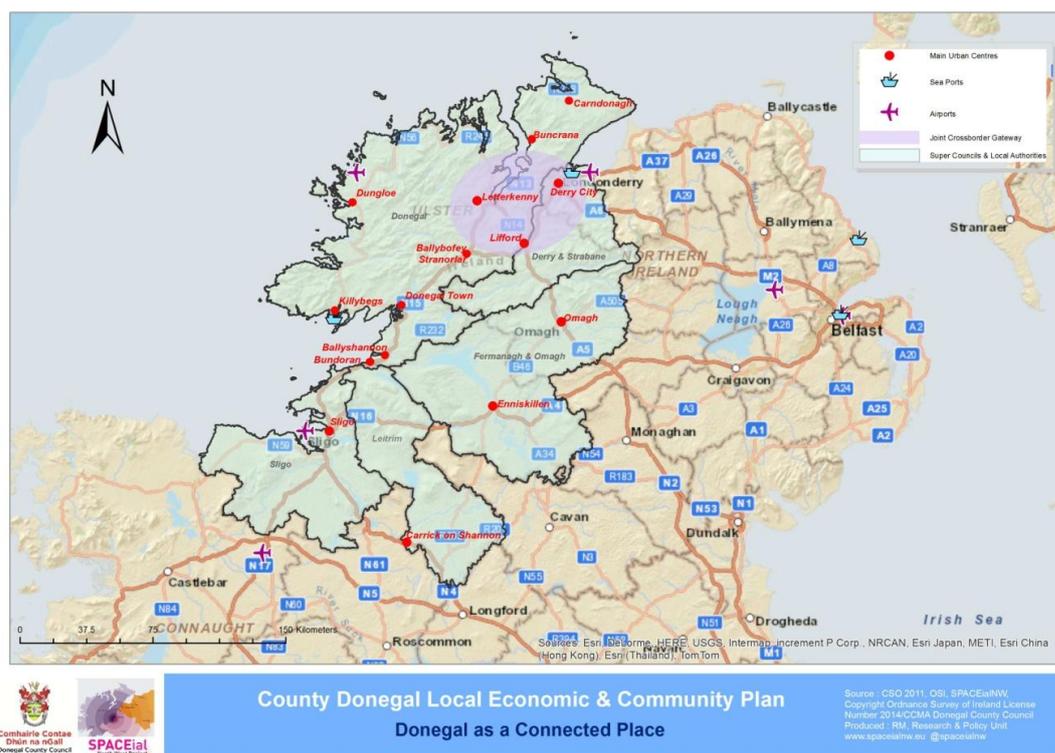
Letterkenny and Derry was designated as a joint Gateway in the National Spatial Strategy in 2002. Letterkenny is the largest urban centre in Donegal with a population of 19,588 having grown by 28% from 2002-2011. It is the 22nd largest town in the State (out of a total 197 towns, CSO 2011) and is projected to grow to 23,000 by 2016 and 25,700 by 2022. The population of the Letterkenny Derry joint Gateway has increased from 105,894 to 113,099 persons from the period 2001/2002 to 2008/2011<sup>2</sup>. The Gateway region is evidenced as geographically larger than the settlements of Letterkenny and Derry, with distinct impacts and opportunities for economic collaboration along the border including opportunities flowing from the A5 /N14/ N15 interconnectivity at Lifford- Strabane.

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<sup>1</sup> Giving it the largest mainland coastline in the country @ 1,134km

<sup>2</sup> This includes the wider Derry Urban Area of Culmore, Strathfoyle and Newbuildings

**Figure 1: Donegal as a Connected Place**



### The Border area

Donegal has a significant cross border dimension with 84% of its border adjoining Derry City & Strabane District Council and Fermanagh & Omagh District Council and 16% adjoining County Leitrim. The border area has developed as a unique region within the North West and evidences many unique challenges and opportunities for both economic collaboration and community development and this will be further enhanced through the improved interconnectivity at Lifford- Strabane as a result of the A5/N14/N15 link providing significant potential for further economic, social and cultural development at this gateway location. The unique border region has particular characteristics as regards trade, currency fluctuation, shared history, culture and heritage as well as the shared legacy and impact of the troubles. It is also distinctive in terms of its role in providing the backbone of strategic roads infrastructure to the County. Through the collaborative work of the Local Authorities in the region, significant partnerships, such as the North West Partnership Board, have been established in recognition of the cross border dynamic and in order to promote a coordinated approach with regard to economic, social and cultural development on a cross border basis.

### The Islands

Donegal has 13 inhabited islands with a population of 796 persons in 2011. The islands of Donegal are a huge natural resource, with rich levels of biodiversity offering huge potential for eco tourism and other niche types of development

All of the above distinctive features have played a very important role in influencing the economic, social, cultural and political landscape of today's Donegal. This is an important

first step in profiling the strengths, weaknesses, opportunities and threats facing the county and in the development of a Local Development Strategy that recognises this historical and geographical context.

### **The Gaeltacht**

In Donegal, the Irish Language is a living language where 69% of the total population regards themselves as Irish Speakers. The Donegal Gaeltacht has a population of 24,744 and represents 24.5% of the total Gaeltacht population in the State<sup>3</sup>; In addition, the Donegal Gaeltacht encompasses a geographical area of 1,502km<sup>2</sup>. This represents 26% of total Gaeltacht land area.

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<sup>3</sup> Census 2011

## 1.1 Donegal's Functional /Cross Border Area

As referenced in the previous section, the border area is a unique area. Its people, living on both sides of the border, predominantly access services and facilities across both jurisdictions and as a consequence may need to negotiate any barriers that arise directly or indirectly as a consequence of these administrative boundaries. Numerous linkages already exist in terms of accessing education, health, policing; fire services, work and retail, etc. These distinctive cross border relationships have developed a number of particularly strong geographical linkages such as at Lifford- Strabane, Letterkenny- Bridgend- Derry, Muff - Derry and Pettigo- Tullyhommon. Change in one jurisdiction can therefore also have a significant impact on the other jurisdiction. Such cross border linkages must be taking into account when developing any strategy to enhance rural development, reduce poverty and tackle social exclusion.

**Figure 2: Educational Infrastructure in the NW Region**

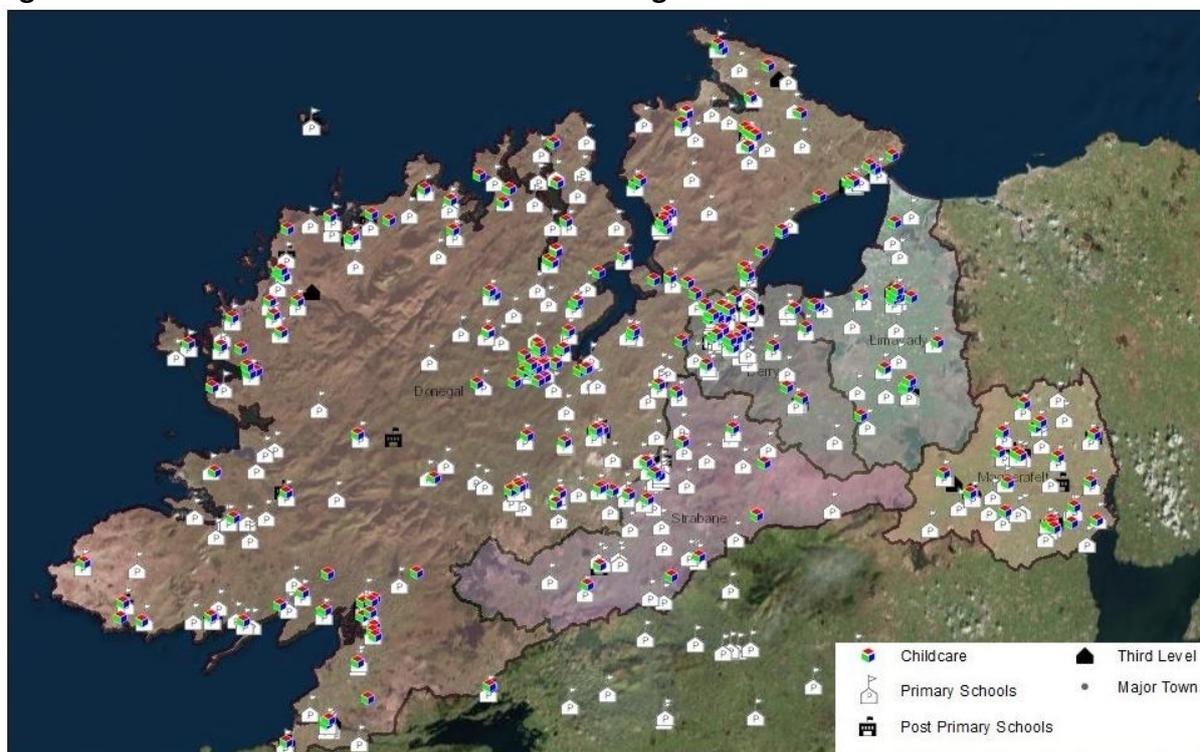
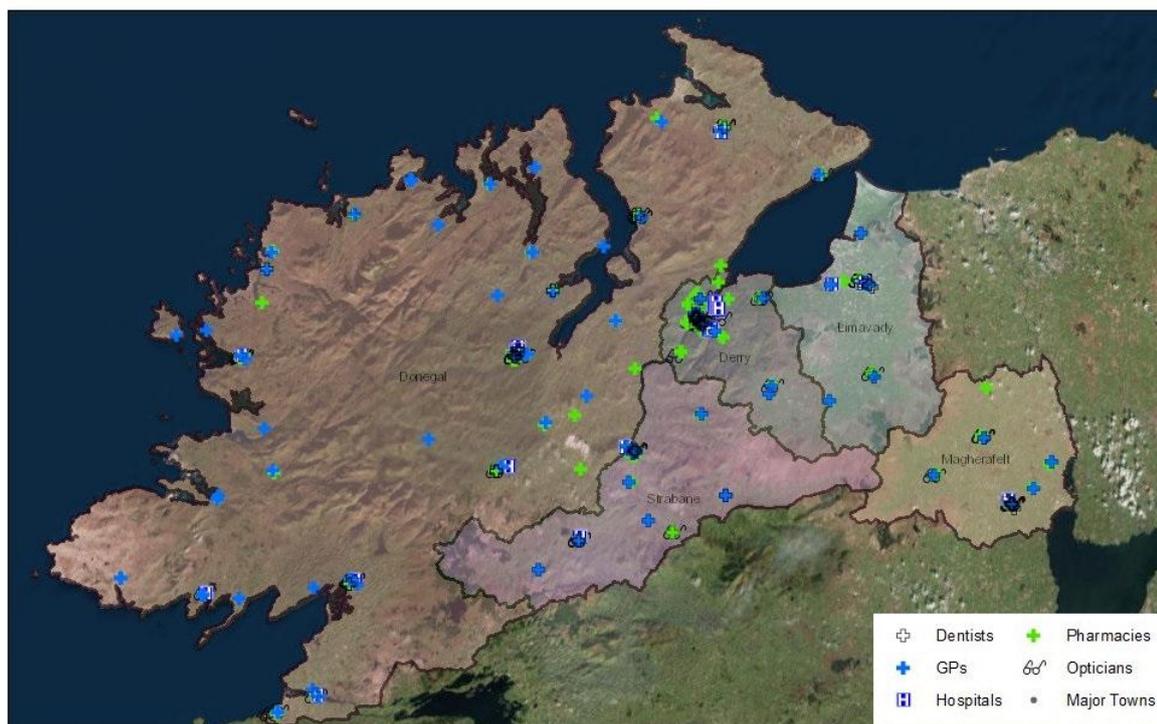


Figure 3: Health Infrastructure in the NW Region



County Donegal Economic & Community Plan  
Health Infrastructure in NW Region

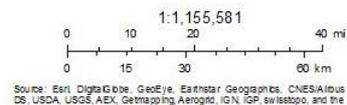
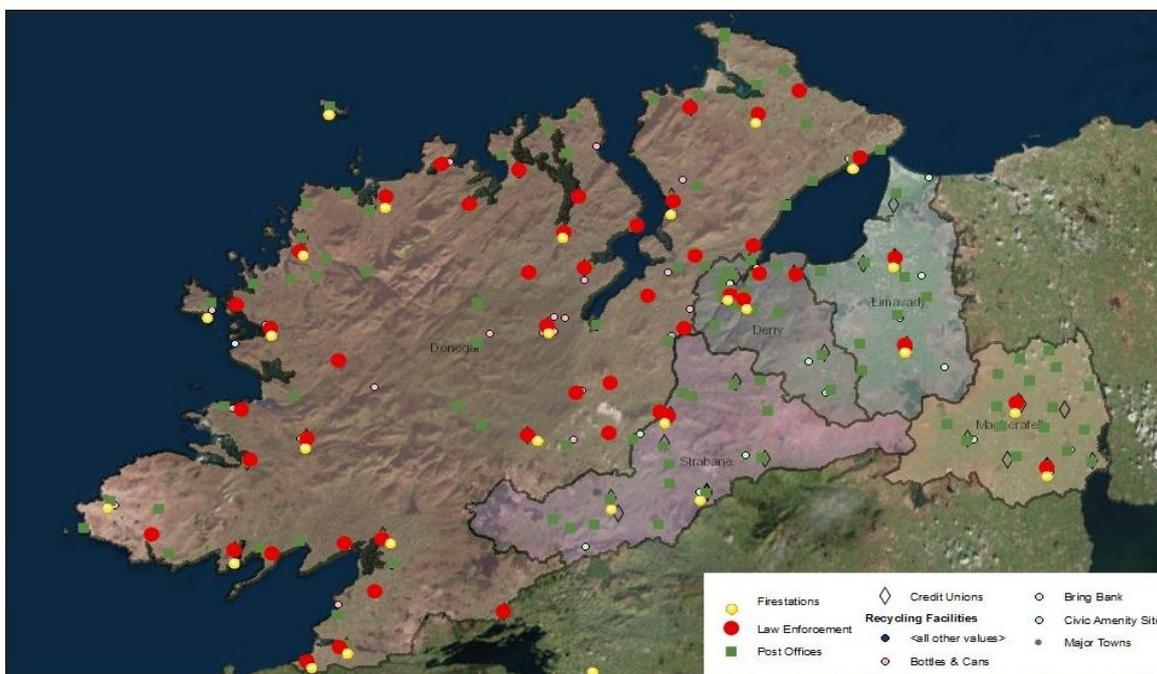
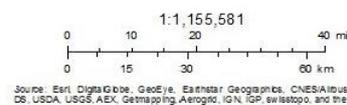


Figure 4: Emergency and Financial Services in the NW Region



County Donegal Economic & Community Plan  
Emergency & Financial Services in NW Region

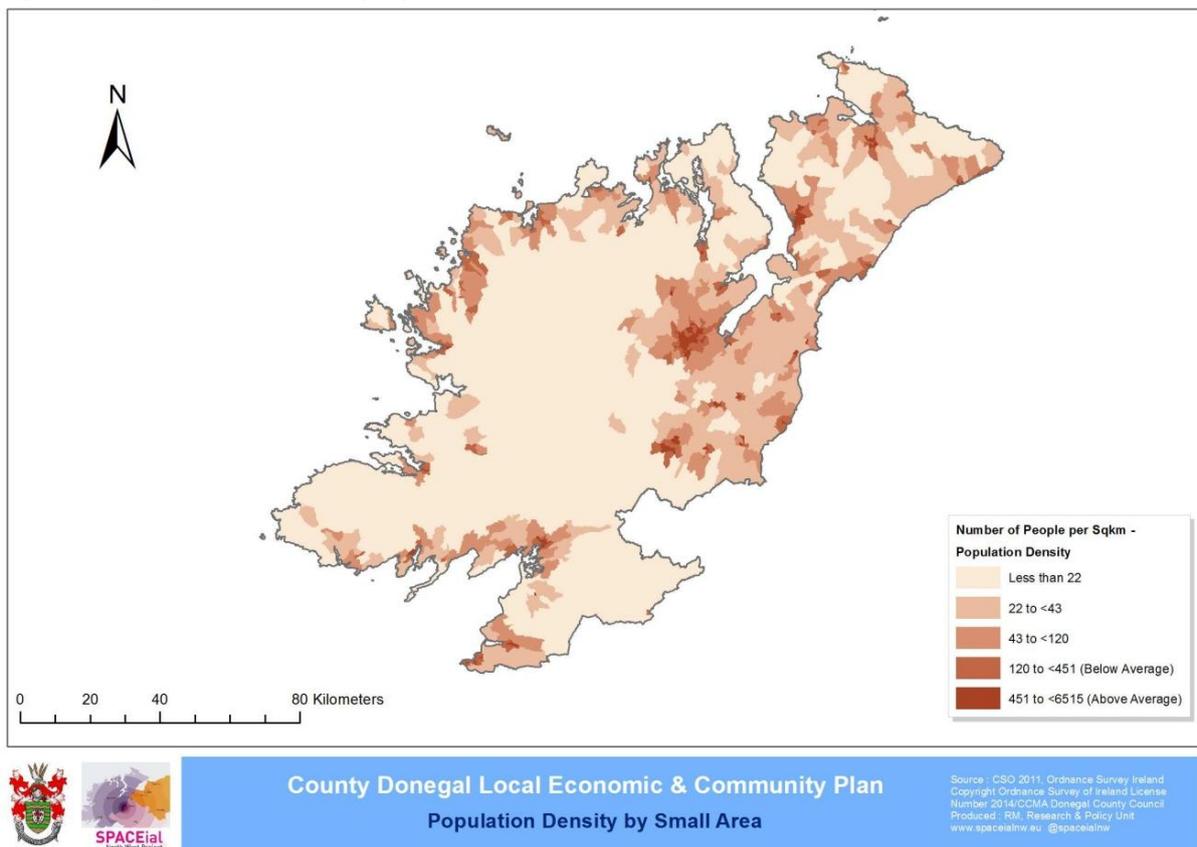


## 1.2 Accessing Services in the Donegal context

### 1.2.1 Settlement Patterns

County Donegal is the fifth most rurally dispersed county in Ireland with 33.8 persons per sq km compared to a State average of 67 persons per sq km (See Table 1, Appendix 1). The county has a predominantly weak urban structure with a large number of small towns, with just 9 settlements falling into the aggregate urban area category of over 1,500 inhabitants.

**Figure 5: Population Density by Small Area**

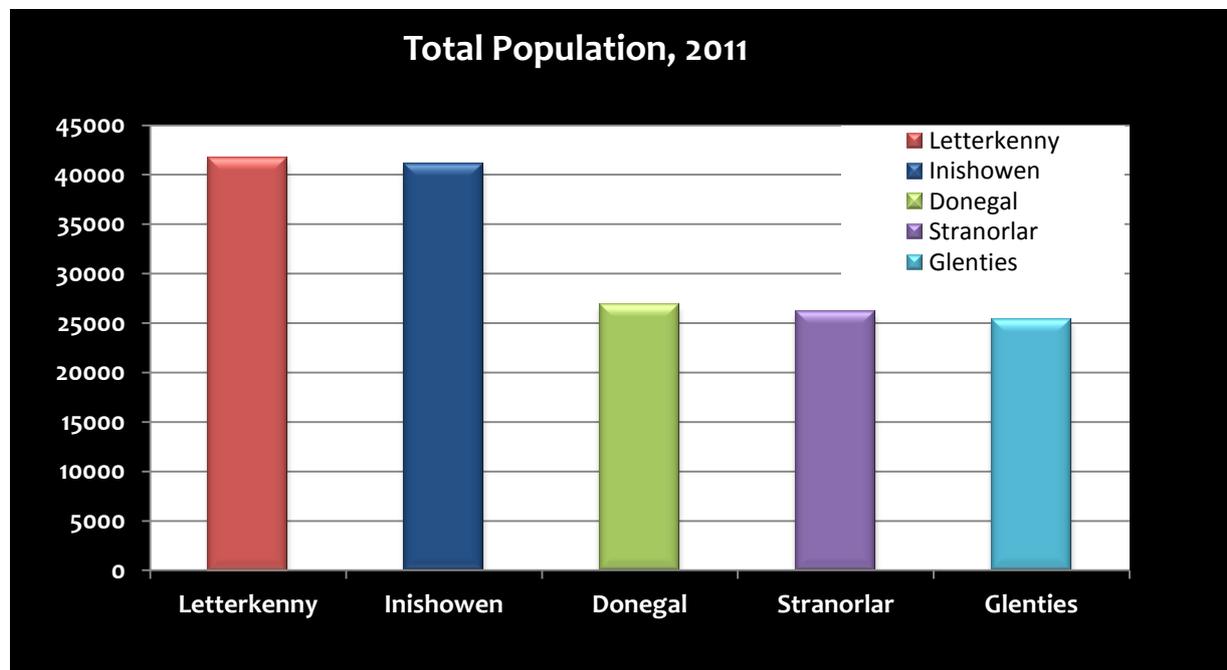


The above map, illustrates the population density within County Donegal, with darker shading reflecting denser areas. The density pattern reflects the east/west settlement size divide within the County, with the majority of the larger and medium size towns located to the north east with the smaller towns to the south west. Similarly, an examination of population change in the county over the period 2006 -2011, illustrates that above average growth has taken place along the Eastern Access and around the linked Gateway Area.

Donegal had a population of 161,137 persons in 2011, which is broken down into the 5 Municipal Districts (MD's). The population is almost evenly distributed between Letterkenny MD (41,697 persons or 25.9%) and Inishowen (MD 41,127 persons or 25.5%). In addition, the population share is similar between Donegal MD (26,863 persons or 16.7%) and Stranorlar MD (26,133 or 16.2%) while 15.7% reside in the Glenties MD (25,317 persons). Letterkenny, Inishowen and Stranorlar all have higher levels of their population

falling under 30 years of age at 44%, 43% and 42%, while Glenties and Donegal have higher percentages of their populations over 65 years at 19% and 15% respectively.

**Figure 6: Total Population by Municipal District 2011**



### 1.2.2 Connecting Communities Physically and Digitally

Given the County's size, its weak urban structure and low population density, accessing and providing services can be difficult. It is important that strategies take into account these challenges in developing efficient, sustainable and economically viable services. At the same time, it is important to examine creative and innovative methods to sustain rural services in Donegal.

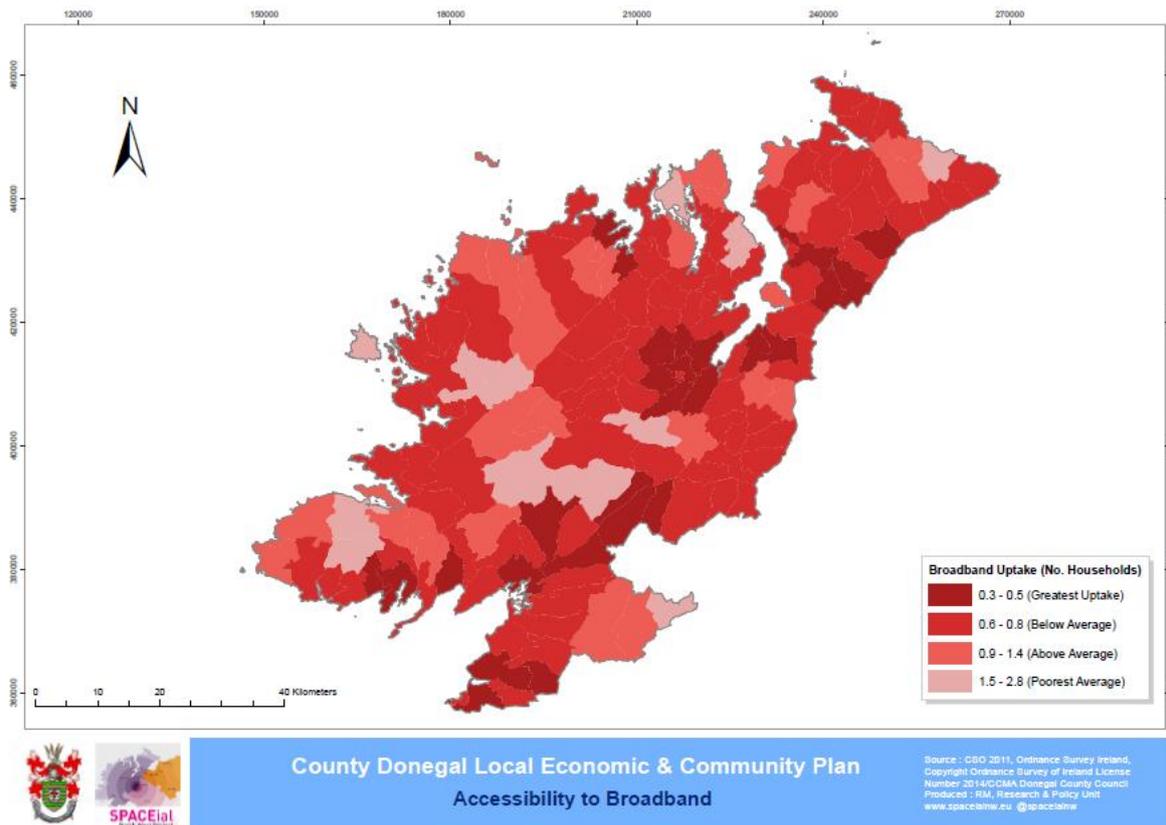
Connecting people to services can be done either physically or digitally, which requires the delivery of essential infrastructures such as a quality road network, bridges, bus services, high speed broadband, etc.

County Donegal is totally dependent on a road based transport system reflecting the small internal market and the dispersed settlement patterns. The road network is the artery for the Region's economy with 100% of goods and people being transported by road and road freight, therefore accessibility costs are among the highest in Western Europe. Opportunities exist to increase connectivity through improving access to transport and communications infrastructure.

In addition, the functionality of digital technologies provides an opportunity to counteract this, such as access to online shopping, online public services, research, e-learning, connecting with friends and families, etc. In order for online services to be accessible to all, a primary consideration is the availability of physical access (broadband connection, laptop etc) however, of equal importance is the individuals 'know-how' to have the competence to access it. The map below illustrates a generally higher uptake of broadband along the eastern axis of the County and linked Gateway, notably areas with higher concentrations of

populations under 15 years, while the western axis of the County has lower a lower uptake and a notably higher concentration of population over 65 years. This tends to illustrate the emergence of a digital divide between the uptake of broadband among younger and older segments of the population but also in a geographical context and between urban and rural areas within the county.

**Figure 7: Accessibility to Broadband**



### 1.3 The Strategic Transport Network

Ireland's economic growth depends on the ability of businesses to trade successfully in increasingly competitive global markets. The availability of competitively priced world-class infrastructure (e.g.; energy, telecom; transport – road, public transport, airport, seaports; waste and water) and related services is critical to support competitiveness. The availability of high quality industrial and commercial property and the upgrading of our key urban centres to make them attractive places to live and work are also vital to support economic growth and job creation.<sup>4</sup>

Significant investment has been made in infrastructure particularly in the road network over the last decade. In September 2015, The Department of Public Expenditure and Reform (DPER) published 'Building on Recovery- Infrastructure and Capital Investment Programme 2016- 2022' setting out Ireland's investment programme that will increase the State's

<sup>4</sup> Department of Jobs, Enterprise and Innovation, Policy Statement on Foreign Direct Investment in Ireland, July 2014

infrastructure, support economic recovery and jobs, support sustainable communities throughout Ireland and provide modern, fit for purpose buildings for the delivery of services. In relation to the strategic transport network in the North West region, the programme reaffirms the Governments support for the commitment under the St Andrews Agreement to co- fund the construction of the A5 route. The Programme also identifies future investment in the maintenance and strengthening of the existing network of roads in the country including the N56 Dungloe to Glenties and N56 Mountcharles to Inver routes. It is important that Donegal and the North West region can deliver on the strategic infrastructural investment required to ensure the economic sustainability and competitiveness of the Derry Letterkenny Gateway.

A high quality transport network is crucial to sustaining growth across all areas of social, environmental and economic development. The Donegal Transportation Strategy recognises the fundamental importance of protecting, promoting and improving the network in attracting investment, developing the tourism industry, addressing climate change and in creating sustainable places and communities.

### **1.3.1 Transport Infrastructure**

Donegal's strategic transport network comprises of Ports, Airports and Strategic Road Networks and key to this is its ability to connect with other national and international hubs and gateways.

#### **Air & Ports**

Donegal Airport and City of Derry Airport are of key strategic importance in the provision of international, national and regional access to/from County Donegal. Plans and policies must support, promote and facilitate the development of this key infrastructure.

#### **Road Network**

Donegal has a predominantly road based transport network, this is accentuated by limited availability/feasibility of alternative modes, the absence of rail infrastructure and by high levels of car ownership and car dependence in the County.

The Strategic Road Network as established in the Donegal County Development Plan 2012-2018 flows from and facilitates the Donegal Core Strategy, in that, it was developed to

- Promote the Letterkenny Derry Gateway and linkages with other National and International Gateways including; Dublin, Belfast, Sligo, as well as access to and through strategic ports and airports.
- Support the National Road Network, through promotion, development and protection policies
- Establish and improve strategic intra-county linkages between the Letterkenny Derry Gateway and Tier 2 and Tier 3 settlements to promote and improve efficient movement of persons and goods within and into the County to encourage investment, to grow tourism, to support agriculture and other indigenous enterprise.

### Bus Service, Taxis and Hackneys

Bus and taxi services play a vital social role in rural communities, linking rural areas with settlements and essential services such as schools and healthcare. There are various types of bus and taxi transport serving the County:

- Bus Éireann expressway provides long-distance services, linking Donegal with Derry, Dublin, Sligo and Galway.
- Bus Éireann/Ulster Bus and private transport operators provide local commuter routes and services throughout the County.
- School bus services operated on behalf of the Department of Education and Science. Private coach and mini-bus services to Derry, Belfast, Galway, Dublin and Glasgow.
- Community bus routes operated under the Rural Transport Initiative (RTI).
- Private taxi services.
- Publicly funded taxi services, such as those operated under Health Service Executive (HSE).
- Rural hackneys are a vital element of the rural transport network. They provide transport services across rural communities particularly for those who do not have access to a motor car and those in more remote areas where bus services are limited or unavailable.

However, there are notable gaps in rural transport particularly in out of hours provision.

### 1.3.2 Modes of Transport

Of the 57,721 private households with the County, 45% (25,874) have one motor car, 32 % (18,569) have two cars, 5.4 % (3,132) have three cars and 1.8% (1,035) have four or more cars. 15.8% or 9,111 households in County Donegal did not have access to a motor car, according to the Census 2011. In relative terms, Donegal ranked in 11<sup>th</sup> position in terms of all local authorities that did not have access to a motor car in 2011, compared to 10<sup>th</sup> highest position in 2006. **(See Table 2; Appendix 1)**

The Census, 2011 illustrates a substantial increase from 2006 in those travelling to work, school or college by car in County Donegal. **(See Table 3(a, b, c &d); Appendix 1)**

#### Travelling to Work

The percentages travelling to work by *'Bus, Mini Bus or Coach'* have decreased from 1.8% in 2006 to 1.2% in 2011 in County Donegal. The comparable figure for the State in 2011 was 5.2%. Travel to work in Donegal using them more environmentally friendly methods or *'By Foot'* (6.7%) or *'By Bicycle'* (0.4%) has decreased since 2006 where the figures were 8.4% and 0.4% respectively. In addition, the comparable figures for the State in 2011 were 9.6% (*By Foot*) and 2.2% (*By Bicycle*)

#### Travelling to School

In 2011, 59.9% of children aged between 5 and 12 years travel to school as a *'Motor car passenger'* compared to 51.7% in 2006. The increase in car usage was accompanied by a drop in travel by *'Bus, Mini Bus or Coach'* from 32.3% in 2006 to 27.7% in 2011. There was also a decrease in travel to school by *'Foot or Bicycle'* dropping from 12.8% in 2006 to 10.3% in 2011. In 2011, 39.4% of children aged 13 – 18 years of age travel to school by *'Motor Car'* increasing substantially from 2006 where the corresponding figure was 29.4%. In 2011,

47.6% of students aged between 13 – 18 years travelled by *'Bus, Mini Bus or Coach'*; compared to 54.4% in 2006.

### **Travelling to College**

There was also a drop in students aged 13 – 18 years using environmental modes of transport to school with 11.5% travelling *'On Foot 'or 'By Bicycle'* in 2011 compared to 14.2% in 2006. 50.4% of students at school or college aged 19 years and over travelled by motor car in 2011 compared to 43% in 2006. Those travelling *'By Foot'* or *'By Bicycle'* decreased from 27.7% in 2006 to 25.8 % in 2011. **(See Tables 3(a) – (c); Appendix 1).**

There is a significant shift away from sustainable modes of travel such as bus, cycling and walking to car based travel which needs to be addressed from an environmental and social inclusion perspective. Reasons for this change need to be identified in order to reverse this trend.

## **1.4 Area Needs Analysis: Sustainable Digital and Physical Connections**

The unique physical characteristics and colourful history of County Donegal have shaped the economic, social, cultural and political context of the present day. Increased digital and physical connectivity are required within the County to overcome the challenges of accessing services given Donegal's geographical context; for example its peripherality, size, rugged landscape, weak settlement structure, island life and an extensive Gaeltacht area.

To offset the digital divide that is emerging in the Donegal context will require focused and innovative solutions by supporting initiatives that seek to build up the digital capacity of rural communities to be able to shop, communicate, pay bills, etc. online. Key aspects should focus around up skilling and knowledge transfer within the community, based around existing digital schools, Taobh Tíre centres in libraries, digital hubs in community centres, etc. Furthermore it is necessary to examine creative and innovative proposals that increase the online presence of rural enterprises including the functionality to process online transactions.

To physically connect our rural populations, it is necessary to support and facilitate proposals that provide innovative transport solutions in rural, disadvantaged and border areas such as rural park and ride schemes, rural carpooling and car sharing schemes, and bus and taxi schemes in consultation with public, private and community organisations. In addition it is necessary to support initiatives that offset gaps in existing transport provisions especially at off-peak hours and on non-viable routes. Strong service towns which provide a high level of wide-ranging services is a key element in building a critical mass of consumers which in turn makes the delivery of more frequent and higher quality transportation services to and from such towns increasing viable.

Easily accessible streets and spaces make our towns more attractive place to live, work, visit and do business. By maintaining, creating and promoting high quality routes within and around our towns and villages, it can be as easy and attractive to walk and cycle as it is to travel by car. Projects and initiatives including small scale environmental improvements and works to public spaces should therefore have regard to how such proposals could improve the existing movement network by making them walk and cycle friendly, etc

When accessing a wide range of services in Donegal on the basis of the County's functional area and its geographical boundaries, it is necessary to examine strategies on an all island basis in developing physical and digital connections whilst working within well established cross border structures and partnerships.

## Chapter 2: Repowering Our Towns

### 2.0 Spatial Trends

Donegal is often described as a rural county; however, after Cork it has more towns and villages<sup>5</sup> than any county in Ireland. These 61 settlements range in size from just over 100 inhabitants to almost 20,000 persons and are vital in sustaining economic and social vitality and growth in the County. They provide a wide range of services and employment functions which both drive and are supported by their rural hinterlands. The towns have the potential to play a crucial role in regenerating economically stagnant areas of the County. Such physical regeneration will have far reaching cumulative benefits to not only the town catchments but to whole areas of the County.

**Table 1 (Appendix 2);** examines population distribution and growth in the County across 6 settlement sizes<sup>6</sup>. Broadly speaking the demographic nature of the County is defined by a number of distinct characteristics:

- 54% of the population live in the open countryside
- 12% of the population live in the Letterkenny Gateway
- 34% of the population live in 60 relatively small geographically dispersed settlements

### 2.1 Urban Vitality

#### 2.1.1 Population Trends

46% of Donegal's total population (or 73,466 persons) live in the 61 settlements scattered throughout the county while 54% (or 87,671 persons) live in the rural areas. Of the 61 towns there are 19 in the Inishowen Municipality,<sup>i</sup> 14 in Glenties Municipality, 12 in Donegal Municipality; 8 in Letterkenny Municipality and 8 in Stranorlar Municipality.

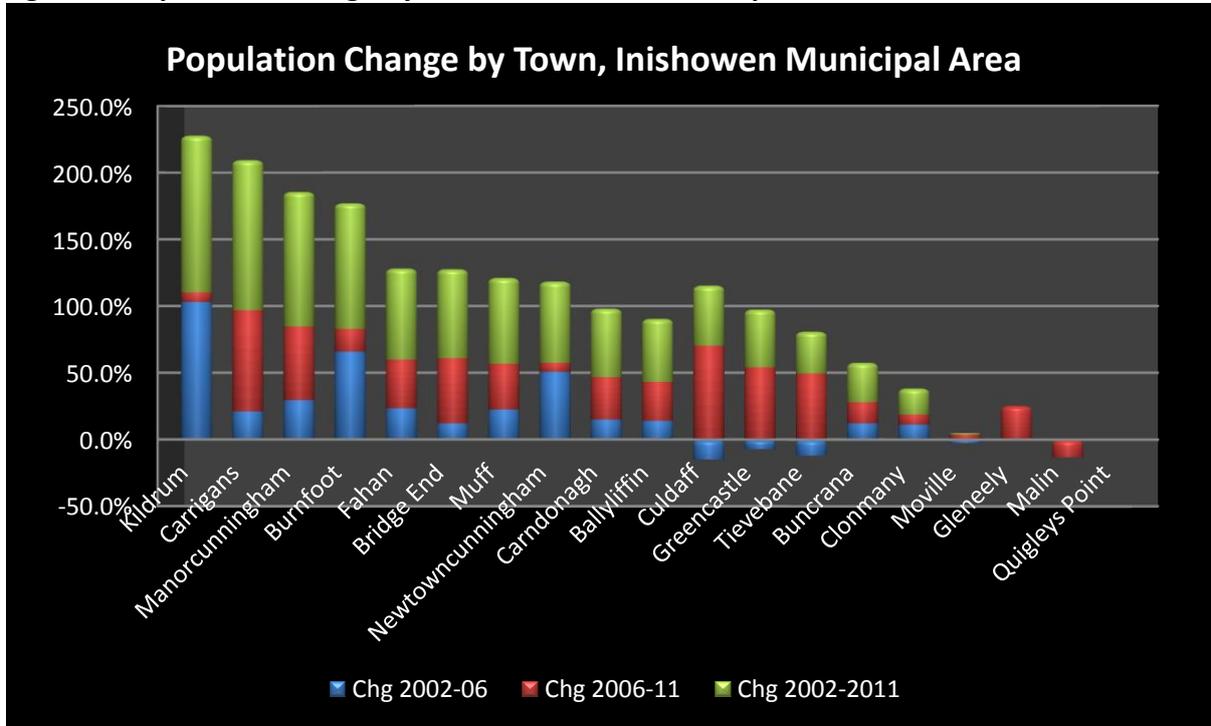
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<sup>5</sup> Census of Population, 2011

<sup>6</sup> Established by the Regional Planning Guidelines for the Border Region 2010-2022

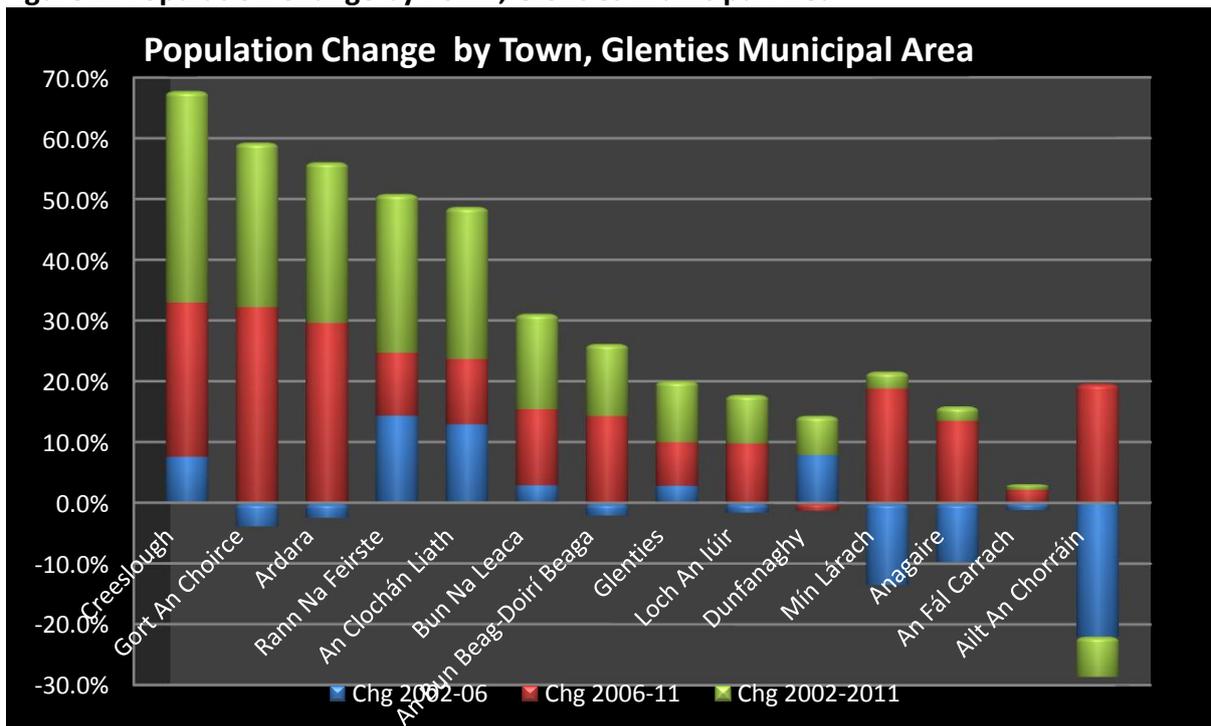
Overall, the 19 towns located in the Inishowen Municipality experienced positive population growth over the 2002 - 2011. Of the top 10 fastest growing towns in the county, 8 were located in Inishowen – Kildrum (117.6%) Carrigans (112.7%) Manorcunningham (100.9%) Burnfoot (94.2%) Fahan (68.3%) Bridge End (66.8%) Muff (64.4%) and Newtowncunningham (60.9%).

**Figure 1: Population Change by Town, Inishowen Municipal Area**



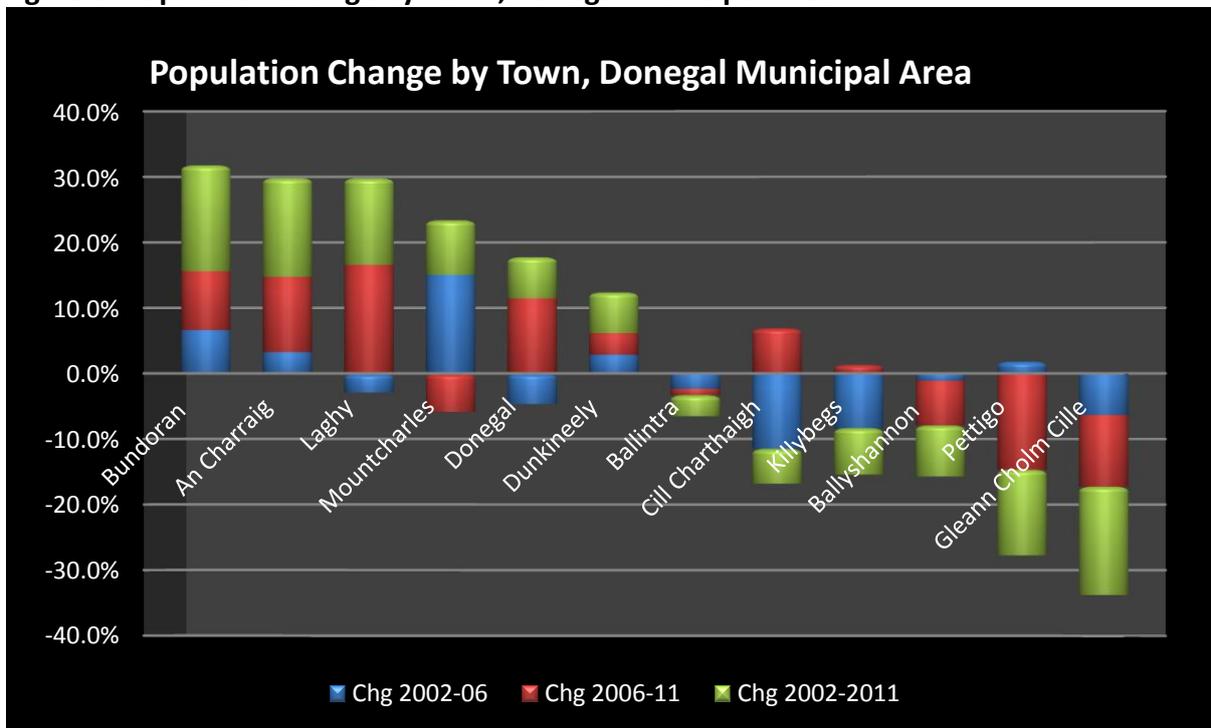
The trend for the Glenties Municipal Area is slightly different with the positive growth in the population in the latter part of the decade, more than compensating for the negative growth in the 2002-2006 period with the result that only Ailt an Choráin (Burtonport) experienced declines in population.

**Figure 2: Population Change by Town, Glenties Municipal Area**



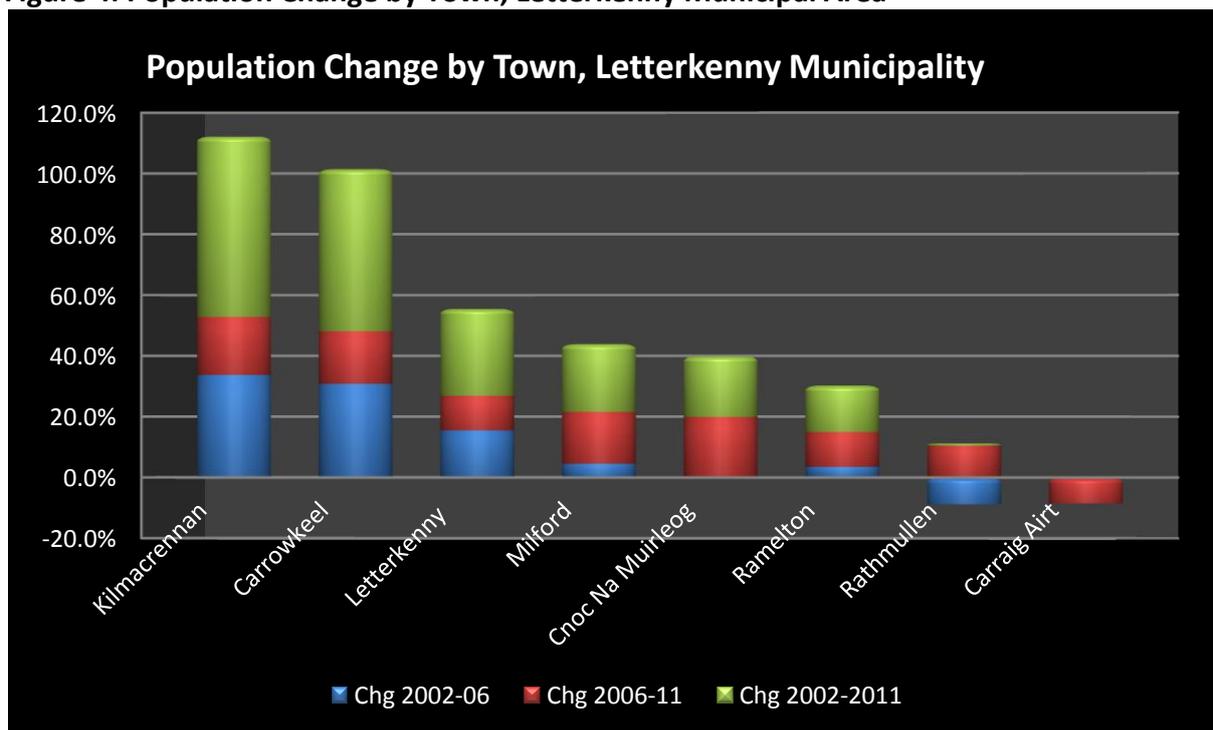
Over the period 2002 -2012, 6 of the 12 towns in the Donegal Municipality decreased in population size, these include; Cill Chartaigh, Killybegs, Ballintra, Ballyshannon, Gleann Cholm Cille and Pettigo.

**Figure 3: Population Change by Town, Donegal Municipal Area**



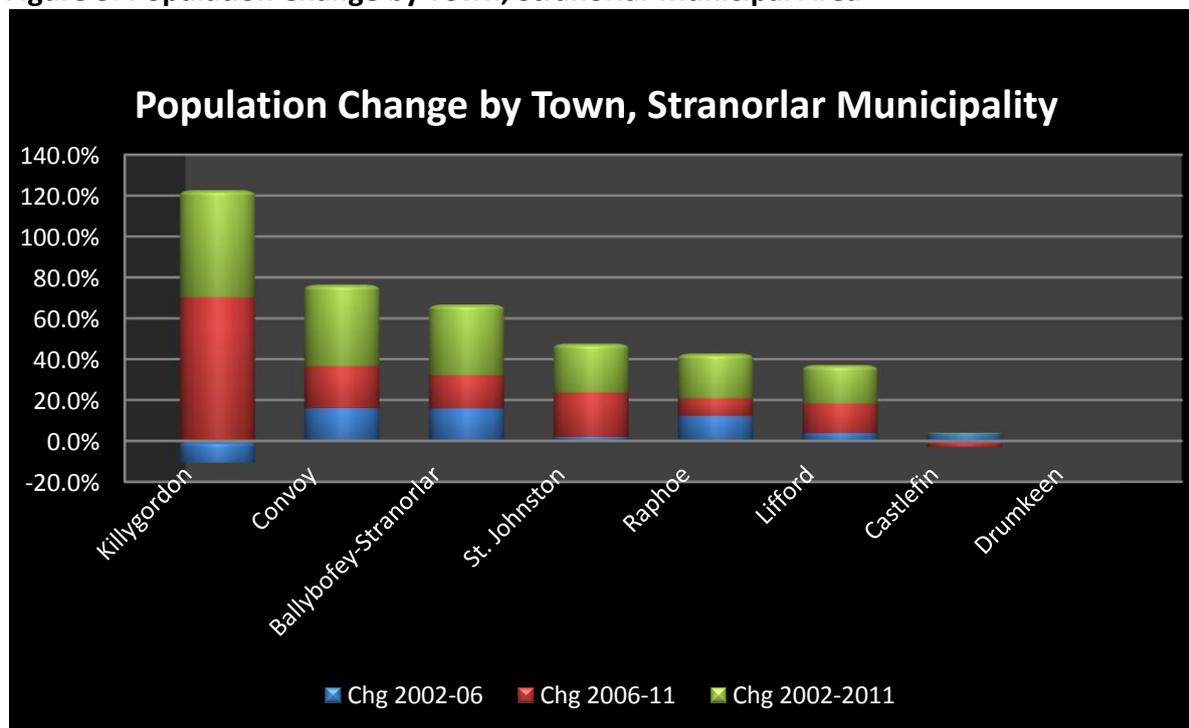
The Letterkenny Municipality accounted for two of the fastest growing towns in the county; Kilmacrennan (59.3%) and Carrowkeel (53.4%). Overall, all towns in this municipality grew over the 2002–2011. The negative growth in Rathmullen in the 2002-2006 (-8.8%) was compensated for by; 2011 positive growth in the 2006-11 period.

**Figure 4: Population Change by Town, Letterkenny Municipal Area**



Population growth trends in Stranorlar are very strong as all of the 8 towns in the Stranorlar Municipality grew over the 2002–2011 period.

**Figure 5: Population Change by Town, Stranorlar Municipal Area**



### 2.1.2 Vacancy and Dereliction

There is a shared public interest in ensuring the most efficient use of land and buildings, especially in urban areas. Strategic planning guidelines in Ireland advocate the optimisation of town centres as key economic drivers of rural hinterlands and whole regions<sup>7</sup>. In line with this, Town Development Plans and Settlement Frameworks recognise consolidation, revitalisation and the sustainable sequential development of towns outwards from the core as key development objectives for towns across the County. These policy approaches aim to reduce instances of vacancy, dereliction and underutilised land in our towns which can have a very damaging effect.

To derive the maximum benefit from regeneration it is important to target central parts of the worst affected areas. Our most stagnant urban locations can be identified using indicators such as vacancy, dereliction and population density. Donegal County Development Plan 2012-2018 identifies town centre areas for all settlements at Tiers 1, 2 & 3 in the settlement hierarchy. It is a key objective of the plan to increase sustainability within these core areas through redevelopment and regeneration.

**Table 2 (Appendix 2)** examines the number of vacant and derelict buildings and the vacancy-dereliction rates in our town centres<sup>8</sup>. Overall instances of dereliction and vacancy are prevalent in our town centres, with just 4 of the 26 settlements under 8% vacant/derelict. Milford has the highest rate at 30%, while Ballybofey Stranorlar has the highest number of vacant and derelict properties at 122 followed by Letterkenny with 101.

<sup>7</sup> Sustainable Residential Development in Urban Areas, 2009, Pg. 42 & PI & Dev Acts 2000-2012

<sup>8</sup> Incl. towns in tiers 1-3 only

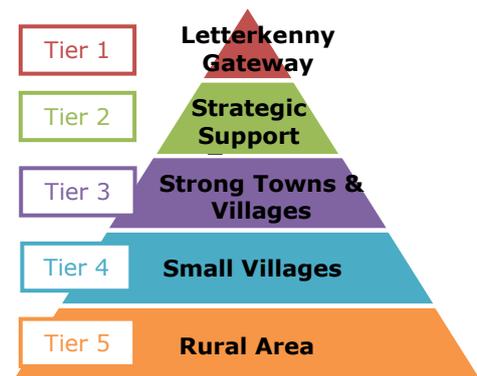
Another factor that can determine urban vibrancy is population density. This is measured by the number of persons per square kilometre. The state average is 1,137 persons per sq km<sup>9</sup> while Donegal settlements have a significantly lower level with a combined population density of 638 persons per sq km. There are a number of factors driving population density levels including undeveloped and underutilised urban lands etc. The Letterkenny Development Plan identifies 66% (613 ha) of such lands within its plan area.

**Table 3 (Appendix 2)**, identifies the density of different sized population categories in County Donegal in comparison to the State, it illustrates that towns falling in population band category 10,000 – 20,000 are nearly 50% lower than the State average and so forth. Projects, initiatives and proposals which intensify urban land use by reusing vacant or underutilised buildings and lands and thus serve to regenerate such locations are encouraged.

### 2.1.3 Population Targets

The Donegal County Development Plan 2012-2018 provides a framework targeting how much and where development will take place in the County. This framework, namely the 'Core Strategy' provides for:

- ❖ a linked Gateway focus for Letterkenny as the primary centre where the creation of critical mass and alignment of key infrastructures is crucial in driving development and prosperity for the region (Tier 1)
- ❖ substantial managed growth for the larger Strategic Support Towns to strengthen these 9 key centres to increasingly act as economic drivers and service centres for the rural catchments (Tier 2 Settlements)
- ❖ targeted development to consolidate and rejuvenate the smaller towns and villages (Settlements in Tiers 3 & 4)
- ❖ balanced development to sustain rural communities and protect the environment (Tier 5).

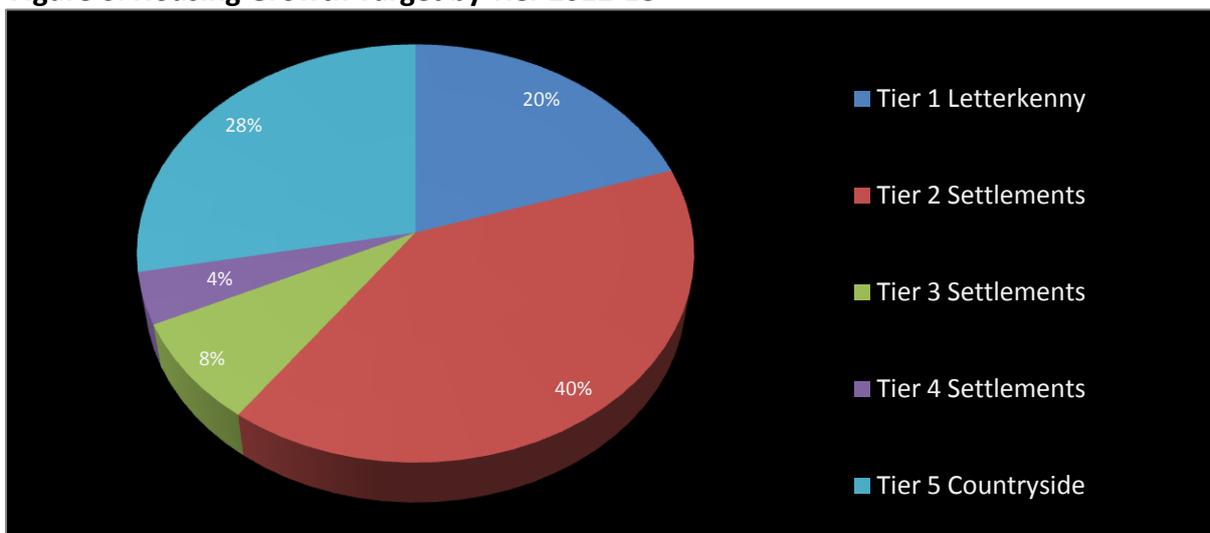


**Figure 5: Population Targets**

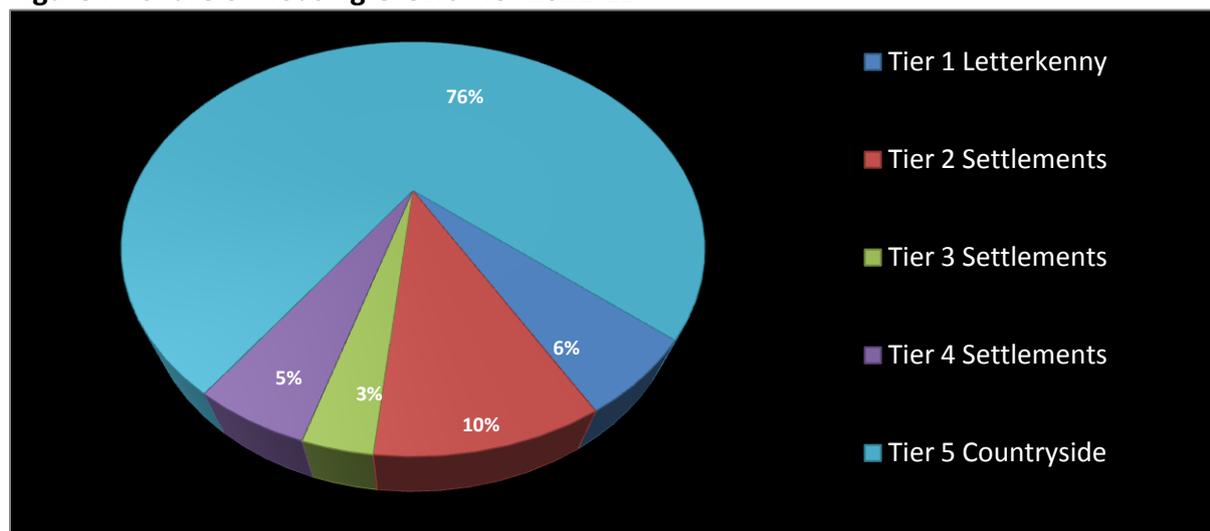
<sup>9</sup> Calculated using Census Settlement Boundaries

Based on population projections, infrastructural capacities, housing vacancy rates and other indicators the County Donegal Development Plan estimated a need for 4,578 new houses in Donegal over the 2012-2018 period. Figure 6 below, illustrates the share of this predicted growth by settlement tier. The Donegal Housing Monitor indicates an increase of 754 dwellings in the County from 2011-2012. Figure 7 illustrates the share of this growth (754) by tier. The charts show significant displacement of new housing from that targeted for tiers 1 & 2 to where housing growth is predominantly taking place in tier 5. These trends highlight an increased risk of stagnancy and reduced levels of activity in our town centres. Vibrant urban centres are key to driving growth and recovery; therefore the introduction of projects and initiatives which assist in increasing urban vibrancy and in consolidating and rejuvenating town centre locations in line with the current County Plan framework are of vital importance to urban and rural Donegal.

**Figure 6: Housing Growth Target by Tier 2012-18**



**Figure 7: Share of Housing Growth for 2011-12**



## 2.2 The People of the Towns

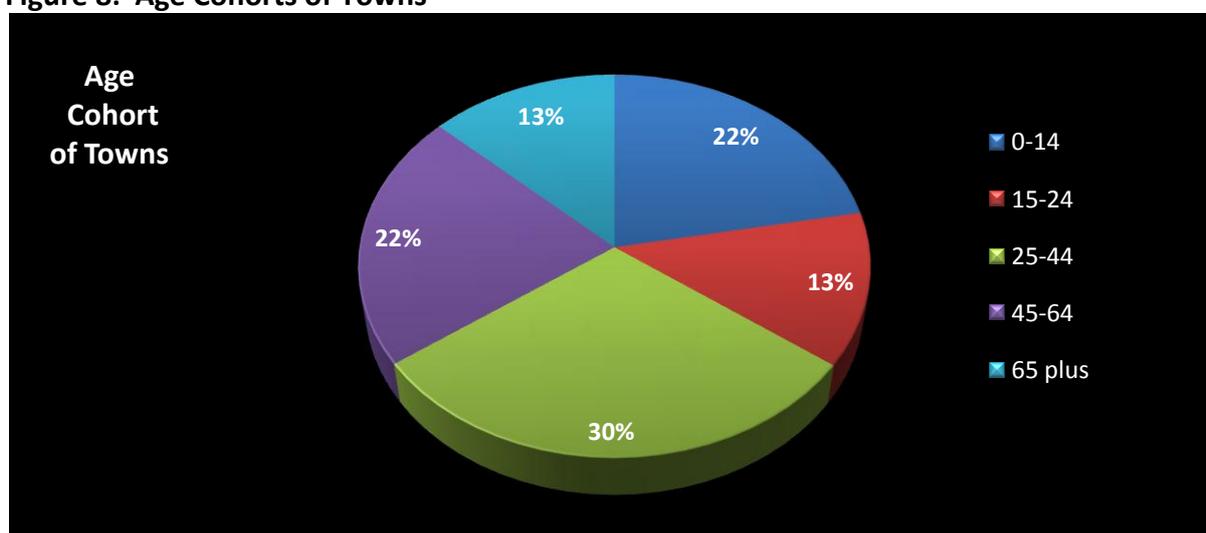
This section provides some socio economic characteristics of the people who live in the different rural towns in each of the Municipal districts in County Donegal .

### 2.2.1 Demographics

#### Age

On average towns in County Donegal had an age dependency ratio of 57.6%. This is a measure showing the number of dependents (aged 0-14 and over the age of 65) to the total population of working age (15-64 years). Above average age dependency ratios (or >58%) were found in 9 of the 12 towns in the Donegal MA; 11 of the 14 towns in Glenties MA; 12 of the 18 towns in Inishowen; 4 of the 8 towns in Letterkenny and 4 of the 8 Towns in Stranorlar. Detailed in **Table 4 (Appendix 2)**.

**Figure 8: Age Cohorts of Towns**



#### Nationality

**Table 5 (Appendix 2)**; illustrates that 11.3% (or 8,115 persons) of the population in County Donegal had a non Irish nationality<sup>ii</sup>. Above average rates (Greater than 11.5%) were recorded in 3 (Bundoran, Donegal, Mountcharles) of the 12 towns in Donegal MA; in 1 (Ardara) of the 14 settlements in Glenties MA; in 1 (Bunrana) of the 18 towns in Inishowen; in 1 town (Letterkenny Legal Town and Environs) in the Letterkenny MA and 1 town (Ballybofey-Stranorlar) in the Stranorlar MA. See **Table 5 (Appendix 2)** for a breakdown of the population of towns by ethnicity.

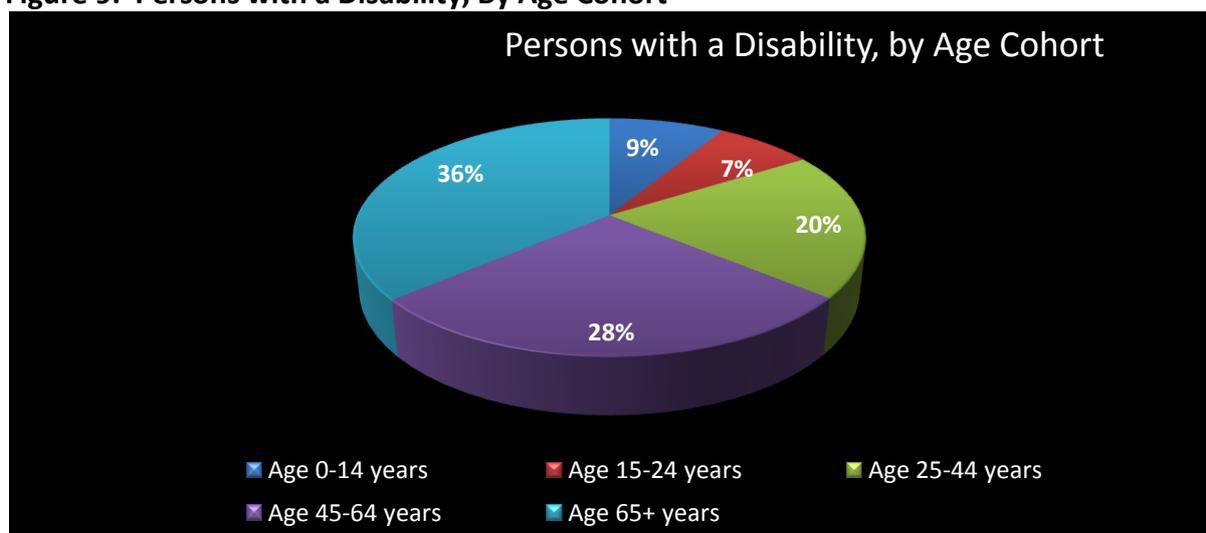
#### Lone Parent Families

Census 2011 illustrates that there are 4,762 or 35% of all families living in urban areas in County Donegal that are headed by a lone parent. Above average rates (greater than 35.5%) were found in 3 (Bundoran, Ballyshannon and An Charraig) of the 12 settlements in Donegal MA; in 8 (Creeslough, Dunfanaghy, An Fál Carrach, Anagaire, Ailt An Chorráin, Glenties, Loch An Lúir, Gort An Choirce) of the 14 settlements in Glenties; in 4 (Carndonagh Clonmany, Manorcunningham and Bridge End) of the 18 settlements in Inishowen; in 5 (Carrowkeel, Kilmaccreannan, Milford, Ramelton and Carraig Airt) of the 8 settlements in Letterkenny MA and in all of the 8 settlements in Ballybofey Stranorlar MA. See **Table 6 (Appendix 2)**.

### People with Disabilities

15.4% of the population or 11, 286 persons with a disability were living in towns in County Donegal. Above average rates (i.e. 16% or higher) were found in 5 (Bundoran, Ballintra, Ballyshannon, Dunkineely and Killybegs) of the 12 towns in the Donegal MA; in 11 (An Bun Beag-Doirí Beaga, Creeslough, Dunfanaghy, An Fál Carrach, Mín Lárach, Anagaire, Ardara, Ailt An Chorráin, Glenties, Loch an Lúir) of the 14 towns in the Glenties MA; in 4 (Carndonagh, Clonmany, Moville, Malin) of the 18 towns in Inishowen MA; in 4 (Kilmacreeannan, Milford, Ramelton, Carraig Airt ) of the 8 towns in the Letterkenny MA and in 5 (Ballybofey/Stranorlar, Castlefin, Convoy, Raphoe and Drumkeen) in the Stranorlar MA. (See **Table 7 Appendix 2**).

**Figure 9: Persons with a Disability, By Age Cohort**



On average 36% of persons with disability in rural towns were aged 65 years and over while 15% were under 15 years.

### Social Class

**Table 8 (Appendix 2)**; examines the top socio economic groups of all persons living in private households in each town by municipality and illustrates that that :

In the Donegal Municipality:

- 3 towns had the highest concentrations of their population falling into the 'non manual' socio economic grouping and these were Bundoran @24%, Ballyshannon@ 24% and DonegalTown @ 23%.
- 3 towns recorded 'manual skilled' as their top social economic groups - Ballintra @ 17%, Dunkineely @ 16% and Pettigo @ 13%.
- Mountcharles recorded both 17% of persons falling in both the 'manual skilled' and 'non manual skilled'. Laghy had the highest proportion of its population falling into the 'employers and managers' category @19%.
- 4 towns fell into the 'semi skilled' category - An Charraig 15% , Glen Cholm Cille 28%, Cill Chartaigh 23% and Killybegs 25%.

In the Glenties Municipality:

- 8 towns - Creeslough @19% , Dunfanaghy @19%, An Fál Carrach @15%, Ailt An Chorráin @19%, An Clochán Liath @17%, Glenties @21%, Rann Na Feirste @12% and Gort An Choirce @ 15% had the highest concentrations falling into the non manual category.

- 3 towns have highest concentration of their populations falling into the 'semi skilled socio economic grouping' these are An Bun Beag-Doirí Beaga @15%, Bun Na Leaca @17% and @ Loch An Iúir @19% .
- 2 towns had the highest concentrations falling into the 'manual' & semi skilled categories which were Mín Lárach @ 16% and Ardara @16%. While Anagaire had 19% falling into the 'employers and managers' category.

In the Inishowen Municipality:

- 10 towns had the highest concentration of their populations falling into the 'non manual' socio economic grouping and these were Buncrana @ 16%, Burnfoot @ 17%, Carndonagh @ 18%, Carrigans @ 22%, Moville@ 19%, Newtowncunningham @ 17%, Manorcunningham @ 19%, Kildrum@ 18%, Culdaff @15% and Quigleys Point @ 22%
- 5 towns had highest concentrations falling into the 'employers and managers' socio economic grouping and these were Ballyliffen @21%, Fahan @ 25%, Greencastle @ 25%, Muff @ 18% and Bridgend @ 18%.
- 2 towns fell into the 'manual skilled' category, which were Tievebane @ 21% and Malin @15%. In Clonmany, the highest concentration fell into 'own account workers' @ 12%.

In the Letterkenny Municipality:

- 6 of the 8 towns (Letterkenny @ 21%, Cnoc na Muirleog @ 22%, Kilmacrennan @ 26%, Milford @ 23%, Remelton @ 19% and Carraig Airt @19% had the highest concentrations of their populations falling into the Non Manual Category.
- Highest concentrations were recorded in Carrowkeel in the Lower Professional Category@ 15% and Rathmullen @ 17%.

In the Stranorlar Municipality:

- All of the 8 towns had the highest concentrations of its population falling into the 'Non Manual Category' Ballybofey –Stranorlar @ 24%, Castlefin @ 19%, Convoy @21%, Lifford@24%, Raphoe @17%, St. Johnston @18%, Killygordan @ 20% and Drumkeen @ 25%.

### **Non Labour Force Participation**

**Table 9 (Appendix 2);** 42% of the population living in rural towns in County Donegal were not participating in the labour force, this equates to 23,986 persons. The reasons for non participation in the labourforce were mainly due to persons being retired (37%), being students (26%), looking after the home or family ( 23%) or unable to work due to sickness or disability (14%).

Above average rates of participation (or rates > 43%) were recorded in:

- 9 of the 12 towns in the Donegal MA , namely Bundoran, Ballintra, Ballyshannon, Dunkineely, Laghy, Pettigo, An Charraign , GlencolmCille and Cill Chartaigh.
- 11 of the 14 towns in the Glenties MA , namely An Bun beag-Doirí beag, Creeslough, Dunfanaghy, An Fál Carrach, Mín Lárach, Anagaire, Ailt An Chorráin, An Clochán Liath, Glenties, Loch An Iúir and Rann na Feirste.
- 5 of the 18 towns in the Inishowen MA, which were Carndonagh, Clonmany, Fahan, Greencastle and Moville.
- 6 of the 8 towns in Letterkenny MA, including Carrowkeel, Cnoc na Muirleog, Kilmacrennan, Ramelton, Rathmullen and Carraig Airt.
- 3 of the 8 towns in Stranorlar MA , namely Castlefin, Convoy and Raphoe,

### **Unemployed**

9,402 persons living in rural towns in County Donegal were unemployed, this equates to 28.4 % of the total labourforce<sup>iii</sup> for these towns. Above average rates (i.e.> 29%) were recorded in Ballintra, Ballyshannon, Laghy, An Charrraig and Glenn Cholm Cille or 5 of the 12 towns in the Donegal MA.

These above average rates were also recorded in Creeslough, An Fál Carrach, Mín Lárach, Anagaire and Bun Na Leaca or 5 of the 14 towns in the Glenties MA. While 8 of the 18 towns in the Inishowen MA recorded above average rates and these included Bunrana, Burnfoot, Carndonagh, Carrigans, Moville, Mannorcunningham, Culdaff and Quigleys Point.

5 of the 8 towns in the Letterkenny MA recorded above average unemployment rates and these included Carrowkeel, Kilmacreannan, Milford, Ramelton and Carraig Airt. All of the 8 towns in the Stranorlar MA recorded above average unemployment rates.

## **2.2.2. Employment and Economic Activity**

### **Employment**

There were 23,730 persons at work in the rural towns in County Donegal in 2011, giving a work rate of 71.6%. Below average work rates (or <71%) were located in 5 of the 12 towns in the Donegal MA, namely Ballintra, Ballyshannon, Laghy, An Charrig and Gleann Cholm Cille. In the Glenties MA, below average work rates were recorded in Creeslough, An Fál Carrach, Mín Lárach, Anagaire and Bun Na Leaca or 5 of the 14 rural towns.

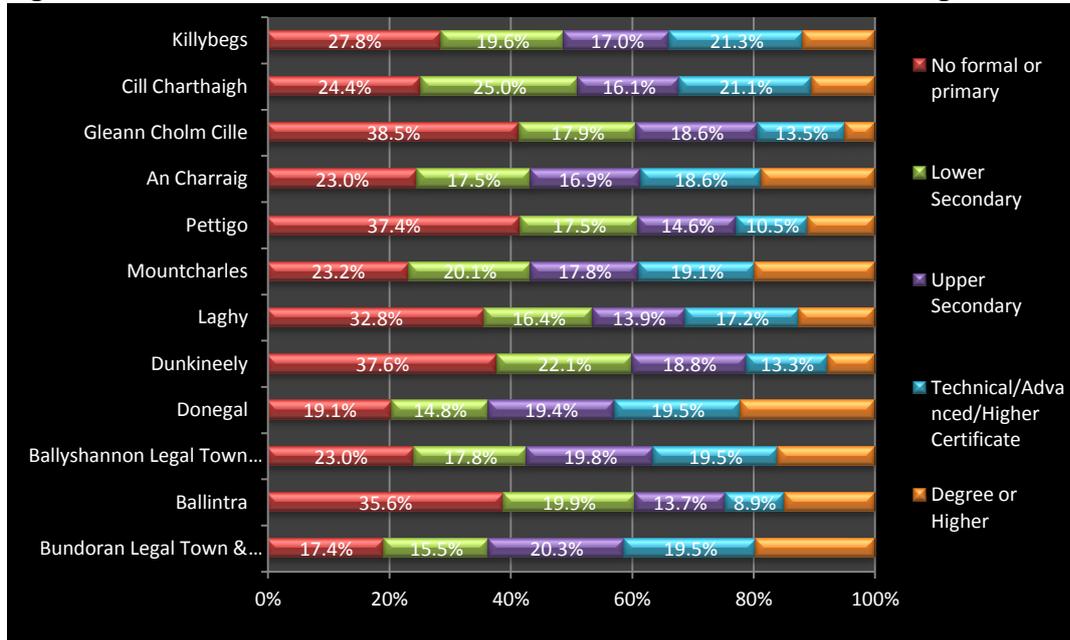
8 towns (Bunrana, Burnfoot, Carndonagh, Carrigans, Moville, Manorcunningham, Culdaff and Quigleys Point) out of 18 rural towns in the Carndonagh MA recorded below average rates. 5 of the 8 towns in the Letterkenny MA recorded below average rates, these were Carrowkeel, Kilmacreannan, Milford, Ramelton and Carraig Airt. All of the 8 towns in the Stranorlar MA recorded below average rates. **(See Table 9 Appendix 2).**

### **Economic Activity**

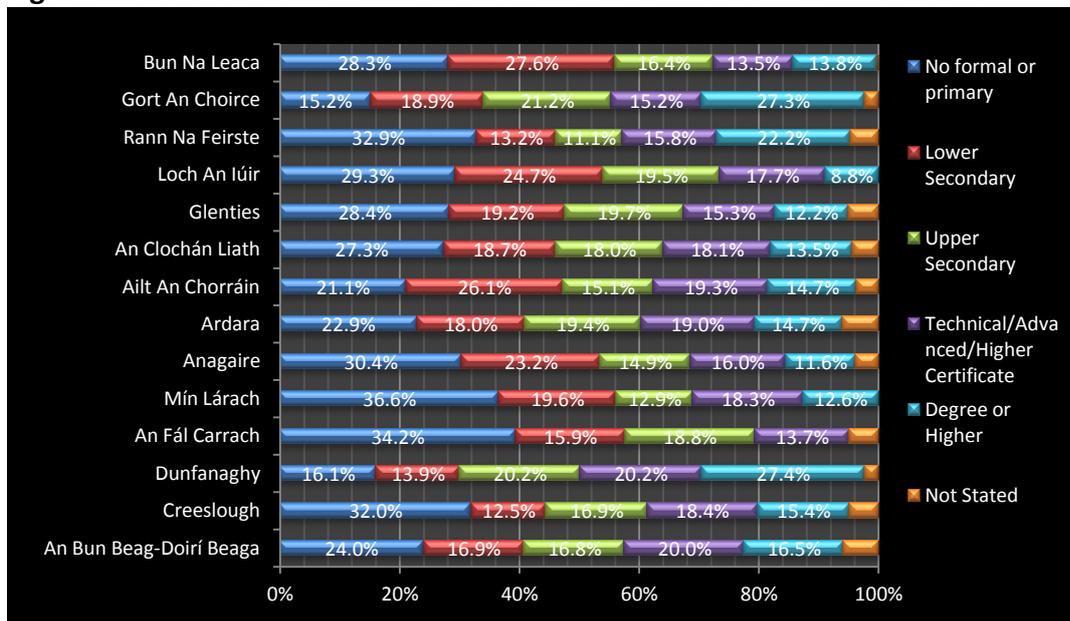
In the absence of a comprehensive business database at the local level in Donegal we can look at the number of commercial or non-residential buildings in Donegal towns. 44% (6,597) of non residential buildings in the County are within the counties 61 settlements, with the largest proportion (1,536) in Letterkenny. The table below sets out those with the highest % share among the towns in the County.

### 2.2.3 Education, Training & Skills Educational Attainment

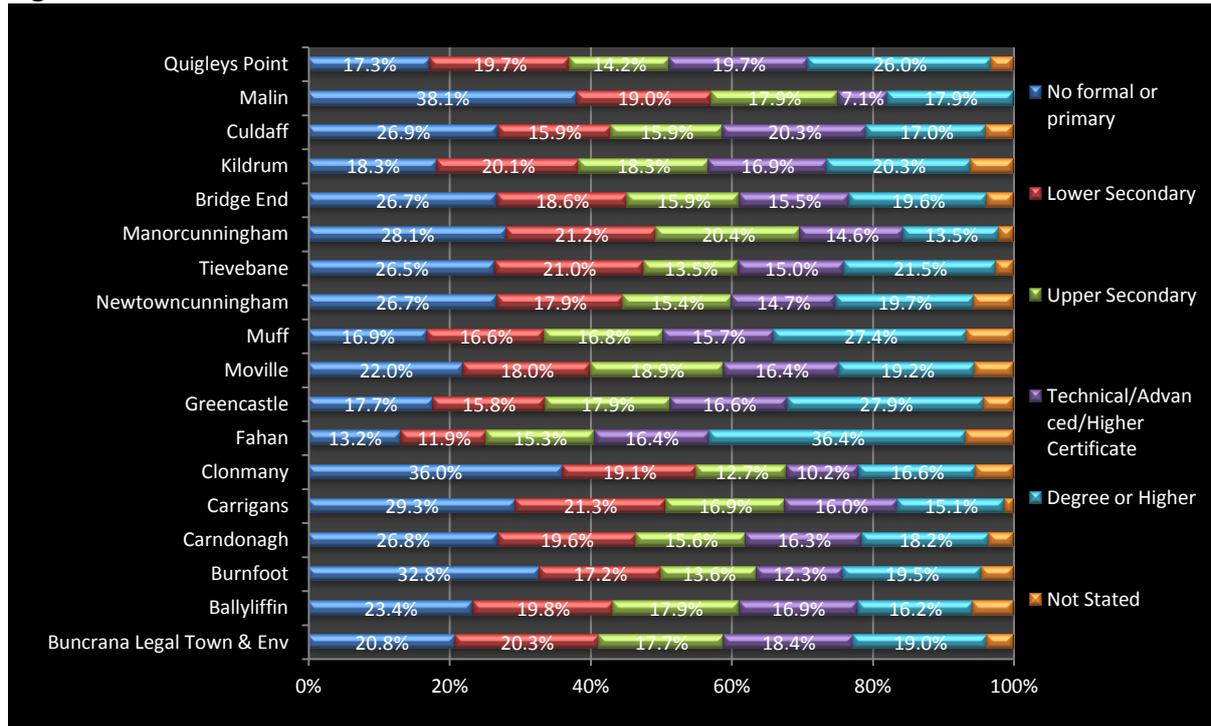
**Figure 10: Educational Attainment in Towns in the Donegal Electoral Area**



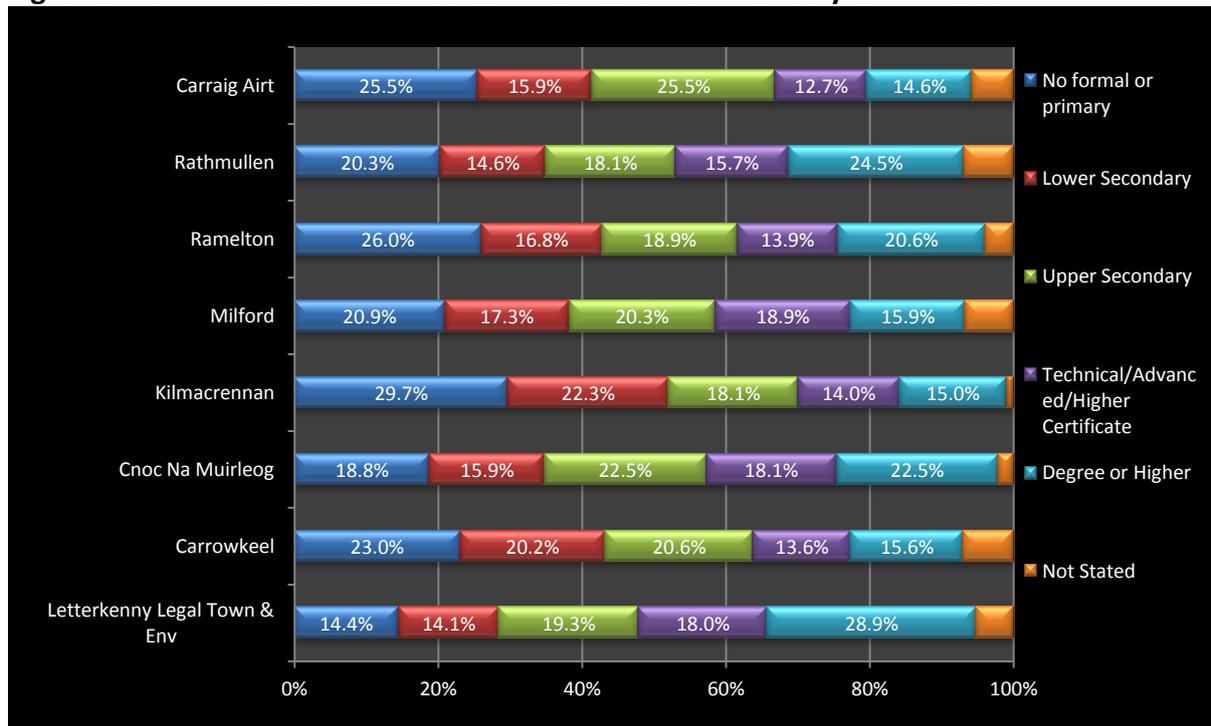
**Figure 11: Educational Attainment in Towns in the Glenties Electoral Area**



**Figure 12: Educational Attainment in Towns in the Inishowen Electoral Area**



**Figure 13: Educational Attainment in Towns in the Letterkenny Electoral Area**



**Figure 14: Educational Attainment in Towns in the Stranorlar Electoral Area**

### 2.3 Area Needs Analysis: Driving Economic Growth Through Towns

Towns and rural areas have a strong interdependency. Settlements provide a wide range of social and economic services to those living in their hinterlands while rural areas create demand for many services in the settlements through the production of raw materials and economic activities such as agriculture, manufacturing, tourism and recreation.

Sustainable, vibrant and economically viable (large or medium sized) settlements are therefore essential in sustaining rural communities, which in turn serve to drive their settlement centres.

A number of towns across Donegal have been designated as development hubs. These designations set out to promote and guide more specific sectoral development in a number of key towns as set out in the adjacent tables.

Bundoran – Marine Tourism
Ballyshannon – Cultural Tourism
Donegal Town – Tourism
Ballybofey/Stranorlar – Sports
Carndonagh/Buncrana – Tourism
Gweedore – Business Development
Killybegs – Renewables & Food

Large or small scale urban regeneration initiatives based around such sectoral themes have the potential to stimulate a range of towns across the County to act as sustainable economic drivers and service centres for their respective catchments.

It is essential that new projects, policies and initiatives maximise the potential of our towns to increasingly develop as economic and social drivers to support the sustainable development of their rural hinterlands by;

- Sequential development from the core
- Reuse of vacant and derelict buildings
- Targeted development of brownfield and other underutilised town centre lands

In examining the potential for rural towns to act as vehicles for economic revival, the urban planning objectives of consolidation and strengthening identified for a range of towns in the Donegal Core Strategy provides a platform for regeneration and redevelopment initiatives.

- To assist proposals by local communities and businesses aimed at tackling urban decay and stagnation through regeneration and upgrade at central urban locations (buildings & spaces)

The above serves to address the trends identified with regard to town centre dereliction, vacancy and population density. Such proposals also serve to increase quality of life through enhancing our living environment and to grow our local service centres to increasingly serve as tourism bases, retail hubs, employment centres, etc. In general, opportunities to reuse existing buildings have the potential to conserve and promote our historic and architecturally important buildings, streetscapes and heritage towns. In this way other important LEADER themes associated to maximise finite resources such as land and to increase environmental efficiencies through building upgrade are all targeted.

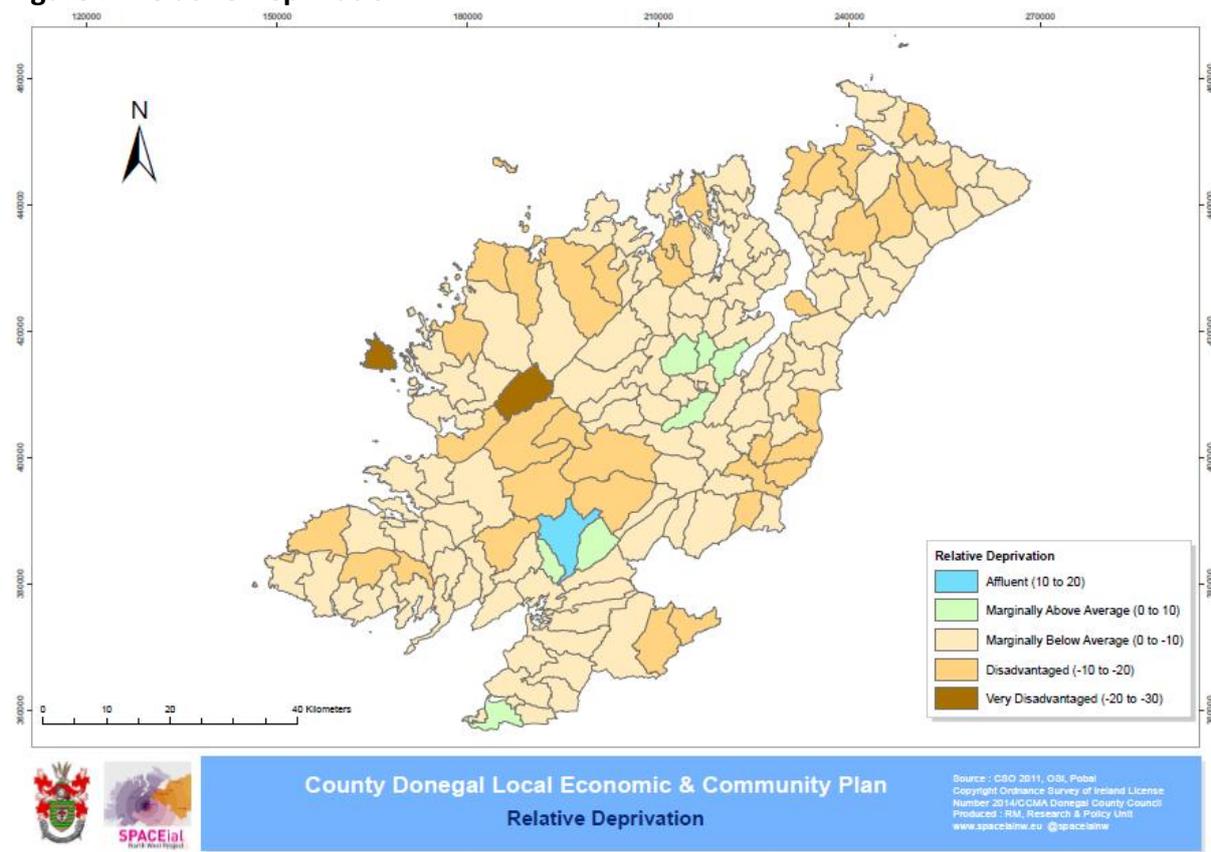
## Chapter 3 Delivering Socially Inclusive Services

### 3.0 Examining Deprivation in Donegal

Deprivation and social exclusion continue to present challenges in the Donegal Context. The Haase Pratschke Relative Deprivation Score attributed to County Donegal in 2011 was -6.25<sup>1</sup> making it the second most deprived local authority area in the State after Limerick City at -6.66. An analysis of the indicators making up Haase Pratschke Index reveals that the key drivers of Donegal low deprivation score are low educational attainment (@ 26.1%) and high male unemployment rates (@ 31.4%).

The relative deprivation scores in County Donegal range from the most affluent score of +11.09 (recorded in Lough Eske to the most disadvantage score of -25.54 (recorded in An Dúchoradh). Spatially, below average rates are both evident in aggregate urban and rural areas. Of the 149 Electoral Divisions within County Donegal, 103 could be described as 'marginally below average'; 36 were classified as 'disadvantaged' and 2 as 'very disadvantaged'. Therefore, 141 Electoral Divisions had scores that fell below the national average of +0.24. The 'marginally above average' deprivation scores were recorded in the electoral divisions surrounding Letterkenny, Bundoran and Lough Eske.

**Figure 1: Relative Deprivation**



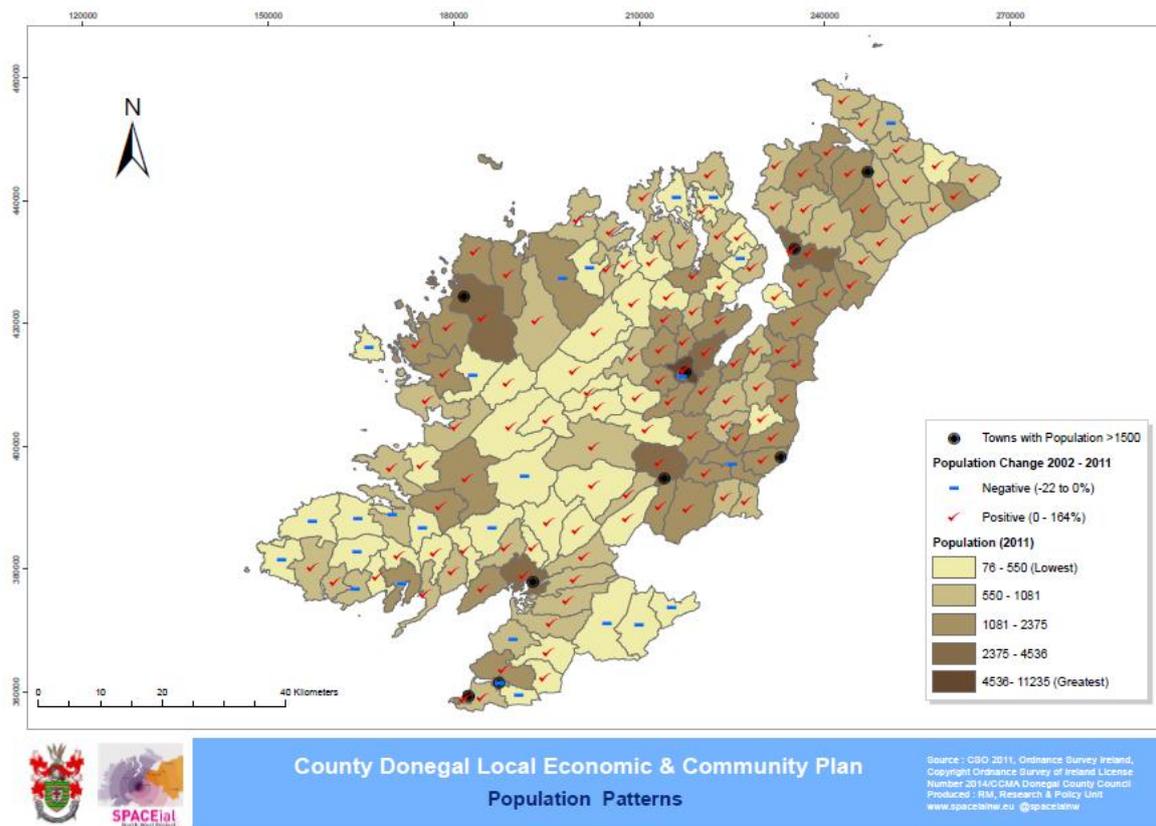
### 3.1 Hard to Reach Communities

#### 3.1.1 Rural Dwellers

According to the Rural Development Programme 2014 – 2020, rural areas in Ireland are considered to be those areas outside of the cities of Dublin, Cork, Limerick, Galway and Waterford. Therefore, all of County Donegal can be regarded as being part of the rural area. The Census 2011 classifies an aggregate urban area as comprising of populations of 1,500 inhabitants and there are nine such towns in County Donegal; Letterkenny, Buncrana, Ballybofey-Stranorlar, Donegal Town, Carndonagh, Ballyshannon, Bundoran, Lifford and An Bun Beag-Doirí Beaga. Therefore, 27.4%<sup>iv</sup> of the total population of County Donegal reside in aggregate urban areas compared to 62% in the State<sup>v</sup>. This further emphasises the rural nature of County Donegal with 72.6 2% of its population (or 116,890 persons) residing in aggregate rural areas compared to 38% in the State.

The following map (Figure 2) presents the changing population trends by Electoral Division in County Donegal, over the period 2006 - 2011. This map illustrates that the strongest population growth is located in Electoral Divisions along the North East Axis which coincides with the location of largest aggregate urban areas but also the fastest growing towns in the County. The weakest growth was recorded in Electoral Divisions in the South West of the County. In addition, there were notable pockets in; Letterkenny Urban, Crossroads, Fanad North & West, Greenfort and Carthage and around Pettigo and Ballyshannon. 123 EDs grew, 25 declined, 1 remained the same, 4<sup>th</sup> largest rural component in the state.

Figure 2: Population Patterns





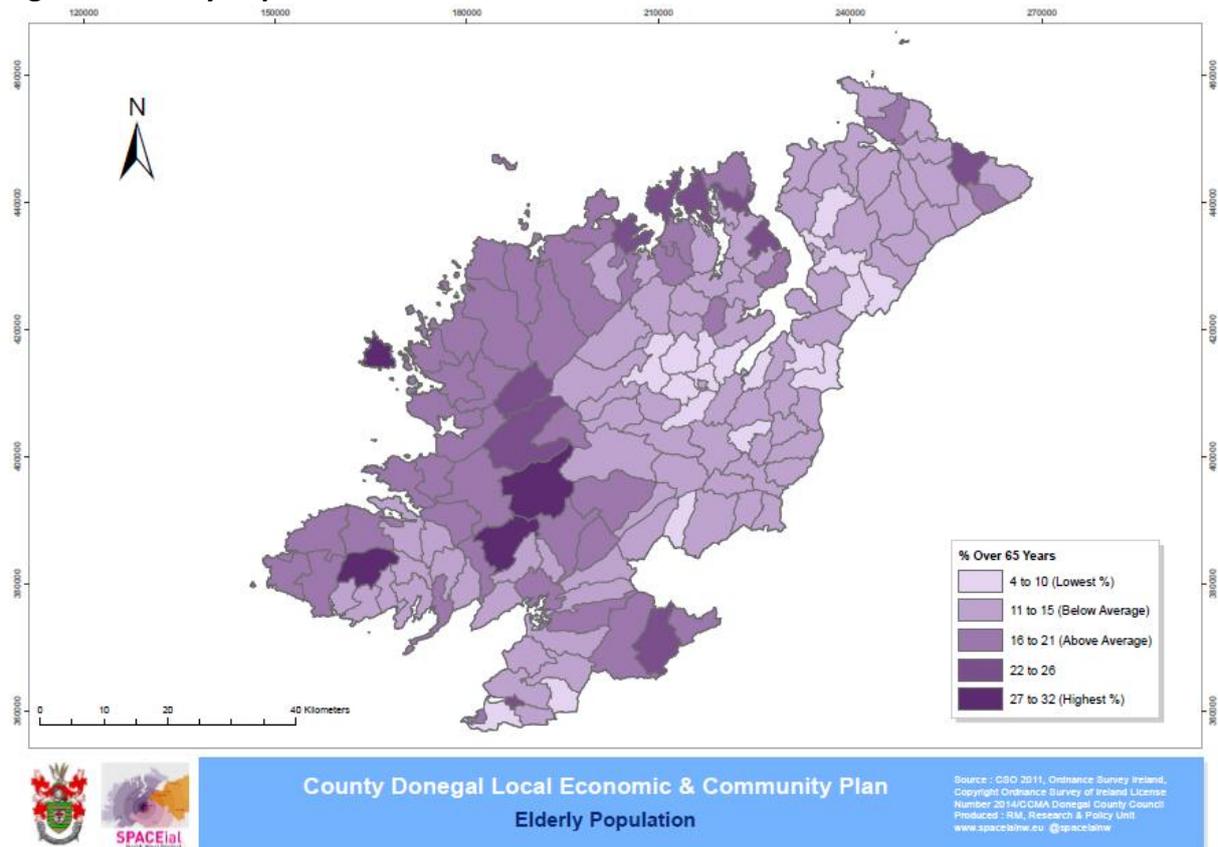
There were **45,704 persons aged 0-18 years** inclusive and these can be broken down into a number of distinctive life cycles:

- Pre School Children (0-4 years) - Census 2011, illustrates an increase in the number of pre-school children from 11,168 in 2006 to 12,727 in 2011 or an increase of 14% (1,599 children). This is higher than the 9.4% increase in the population of County Donegal as a whole, but lower than the 18% increase experienced in the State. This has a number of implications for service delivery within the county, in terms of ample childcare provision, supports for children with special needs, access to GP's, hospital services etc.
- Primary School Children (5 – 12 years)- There was an increase in the number of children of primary school age in County Donegal, rising from 17,830 in 2006 to 19,463 in 2011, or an increase of 9.2% (or 1,663 children). The number of primary school children in the State in 2011 was 504,267, increasing by 12% over the intercensal period and at a faster rate than in the State. Services are much the same for primary school children, however transport to schools and different type of sporting and recreation activities increase in importance.
- Secondary School Children (13 -18 years) - There was a slight increase (0.2%) in the number of children of secondary school age ( 13-18yrs) in County Donegal from 13,482 in 2006 to 13,514 in 2011. In 2011, the total number of children in the State at secondary school age was 344,931, an increase of 0.8%. Again similar services are required as above in addition to transport to both schools, colleges and work placements etc.

### 3.2.2 Elderly

People in County Donegal are living longer and in 2011 the population aged 65 years plus had increased by 17 % (or by 3,060 persons) to 21,471. Of the 21,471 persons falling into this age category 9,241 persons were aged 75 years plus, 168 persons were aged 95 years plus and 25 persons were 100 years plus. In total, Donegal had 13.3% of its population falling into the 65 years and over age category. Whilst increased life expectancy can be testimony to advancements in health care in general and to quality of the natural and physical environment in particular in County Donegal, from a service delivery perspective it is important to ensure that those additional years are healthy years<sup>vi</sup>. The 2011 Census highlighted that 12.5% of the population of the Border Regional Authority Area were 65 years and over. Recent research recently carried out by AIRO<sup>vii</sup> indicates that in 2031, 21.5% of the population of the Border Regional Authority Area will be over 65 years of age, bringing with it major demographic and service related challenges.

Figure 4 below reveals that above average concentrations of elderly persons are located towards the West and North West of the County, mainly in Gaeltacht areas and in areas that have experienced lower levels of population growth.

**Figure 4: Elderly Population**

### Age Dependency Ratios

Given the changes in the population cohorts outlined above, it is not surprising that County Donegal had the second highest age dependency ratio@ 56.9% in the State, where the rate was 49.3%. So for every 1 older or younger persons in County Donegal, there are 1.75 persons of working age. The impact of high age dependency rates are in terms of lower tax revenue, lower pension funds and higher Government expenditure on services.

## 3.3 Sustainable Community Service

### 3.3.1 Community Centres

Community centres have the potential to combat many of the challenges faced by rural communities in Donegal. In recent years significant investment has been made in building and upgrading community centres, resulting in a high level network of community infrastructure throughout the County. An opportunity exists to increase activity and broaden the functionality of such centres. Community centres have the potential to act as community technology hubs to assist in providing online services to members in hard to reach communities who may not have the technology or skills to access such services. The potential of some community buildings to be used as multi service points comprising even social or cultural enterprises has great opportunities to increase tourism footfall with many spin off businesses becoming viable in the process. By increasing the economic viability and social vitality of such locations, rural communities can maximise their potential. Opportunities exist to reduce use of fossil fuels and at the same time reduce running costs of community buildings through initiatives such as the SEAI Better Energy Community program.

### **3.3.2 Education and learning**

The presence of a third level Institution in the County is a key strength. Letterkenny Institute of Technology has 3,300 full-time students, with 70% of Donegal origin. There are students from 15 international countries attending the college. The college has two campuses in Letterkenny and Killybegs providing a variety of programmes in Business, Engineering, Science and Tourism.

The longer a person stays in education the higher the skill levels attained. There are 23,744 persons in County Donegal which have a higher certificate, ordinary degree, honours degree, post graduate and doctorate qualifications. A total of 22% of persons who have completed their education have a third level qualification. Social Sciences, Business and Law were undertaken by 9115 and is the main course in 42% of all EDs in the County. Engineering, manufacturing and construction was ranked next with 8127 and featured in 32% of all EDs, while Health and Welfare was the main course by field of study is 13% of all EDs, with 7390. Social Sciences, Business and Law qualifications is attained after two or more years of study in or outside County Donegal, the spatial distribution of 9115, shows a correlation with tier one, tier two and the majority of tier three towns. 8127 have undertaken engineering, manufacturing and construction as the main course of study and the greatest concentrations above average of 57 plus are located in the tier one, all of the tier two, most of the tier threes and more than half of the tiers fours. Health and welfare is sporadically dispersed throughout the County with a slight tendency to be located in and around EDs which contain Tier one, two and three settlements.

Letterkenny Gateway had the second highest percentage of persons, living in all Gateway Towns, who left formal education aged 19 years and over. In addition, the Letterkenny Gateway had also the fourth lowest percentage of persons, living in Gateway Towns, who left education at 18 years and younger. There are 18,445 persons aged 15 years and over in fulltime education or undertaking a training course.

Donegal ETB has established a comprehensive network of programmes and centres throughout the County that has made adult education accessible to all. There were 11,826 learner enrolled in 2013, there were 685 in Adult Guidance Service; 667 on Back to Education Initiative; 2,130 in Basic Education; 180 on the VTOS (Vocational Training Opportunities Scheme); 160 Youth Reach; 5,613 in Community Education; 1,226 I.T. Training Centre; 174 in the Mobile I.T. Training Centre and 991 Night Class Programmes.

Donegal has a considerable educational resource, with 177 primary and special schools having a total enrolment of 19,073 in the academic year Sept, 2013/2014. There are 27 post primary schools with an enrolment of 12,734 students for academic year 2013/14.

#### **Libraries**

Countywide network of 13 libraries, 11 Taobh Tíre centres, a Cross Border mobile library (covering the east of the county and northern Ireland) with approx 335,700 visitors annually and opportunities to support creative enterprise. For example, libraries have collections of books to support people wishing to start their own business, provide access to local/national newspapers, the Internet, Europe Direct Information Centre. Some larger libraries also have meeting rooms that could potentially be utilised. Libraries provide opportunities for lifelong learning and building skills and run a series of events to promote literacy and creative expression throughout the year.

### 3.4 Sustainable Homes

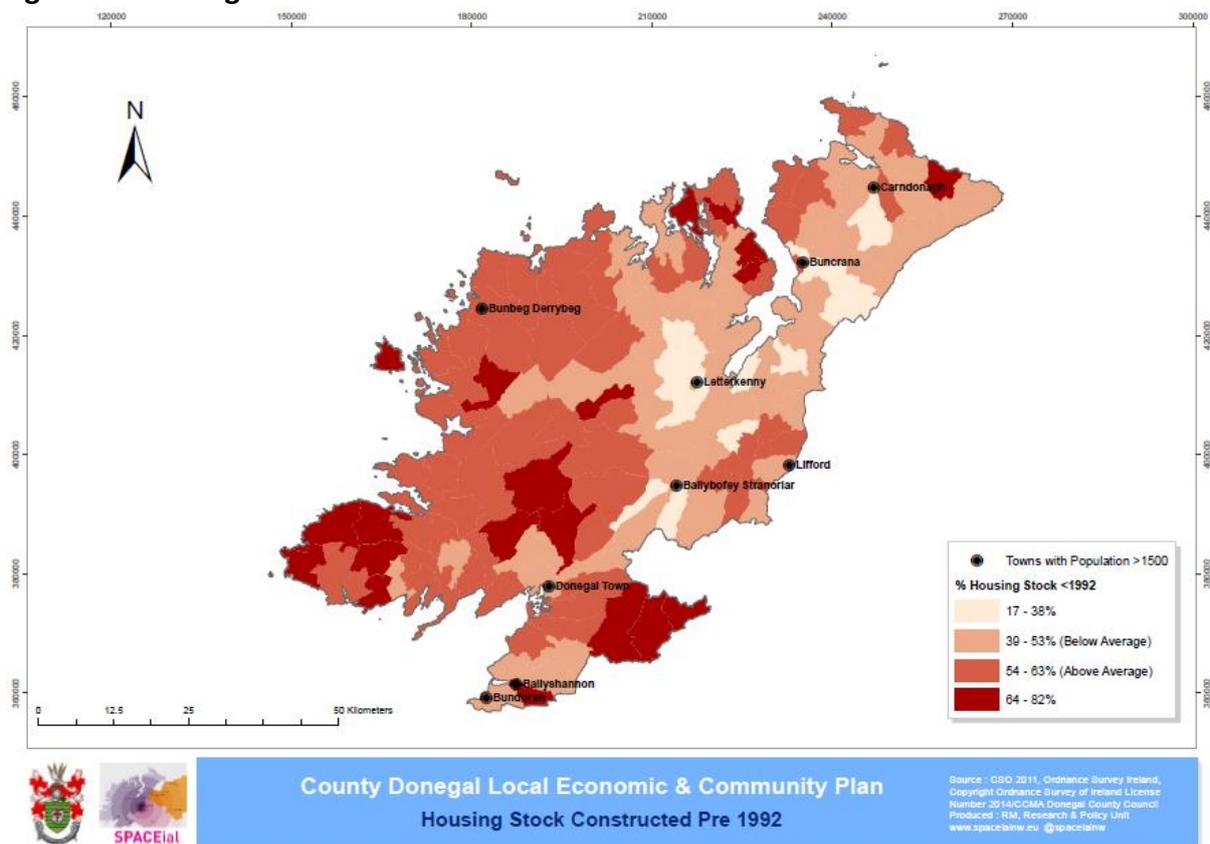
Sustainability can be improved by investing in existing infrastructure, whether it's unfinished or inadequate new housing, older housing or vacant or derelict housing. Homes can be future proofed by reducing our reliance on non renewable energy in our homes through such investment. This section examines our current position in terms of our existing fuel consumption, use of alternative transport, energy efficiency levels of our buildings, etc.

#### 3.4.1 Housing Age

Building Regulations were initially provided for under section 86 of the 1963 Local Government (Planning and Development) Act, and matters for which regulations could be prescribed were listed. However these provisions were never enacted and, prior to 1992, there were no National Building Standards in force throughout the country (although building bye-laws had been in force in parts of the county). The first National Building Standards in Ireland were introduced by the Building Control Act of 1990 (BCA 1990). The regulations came into force on the 1st June 1992.

Buildings built prior to 1992 (incl. those in Donegal) were not subject to building control regulations. Map 5 below details the housing stock constructed prior to 1992. Many of these buildings were deemed to be of a substandard build in terms of structure, fire, site preparation and resistance to moisture, materials and workmanship, sound, ventilation, hygiene, drainage and waste disposal, heat producing appliances, stairways, ramps & guards, conservation of fuel and energy, access for disabled people (this list sets out the various parts of the current regulations).

**Figure 5: Housing Stock Constructed Pre-1992**



### 3.4.2 Housing Ownership

There were 57,964 private households in County Donegal, increasing by 15% over the period 2006-11. Of which 57,721 were permanent private households (15% increase 2006 – 2011) and 243 were temporary private dwellings in 2011(-42% decrease 2006-2011).

- 43% of dwellings (24,268) were owner occupied without a loan or mortgage, compared to 34% in the State.
- 32% of dwellings (18,418) were owner occupied with loan or mortgage, compared to 35% in the State. 27% (or 4,929 households) of households with a loan or mortgage in County Donegal were headed by an unemployed person or person not in the labour force.
- 24% of households (13,989) were rented, increasing by 19% (or 9,471 households) since 2006. The majority of these households (53%) were rented from private landlords, followed by 34% from a Local Authority, 3 % from a Voluntary Body and 10% were occupied free of charge. The percentage of households rented in the State was 29%.

### 3.4.3 Households Composition

Of the 57,964 private households in County Donegal:

- 14,890 single persons households (26%), which is greater than the corresponding percentage for the State @ 24%
- 29,486 husband and wife households with/without children or other persons (51%), which is greater than the percentage for the State @ 49%
- 3,247 cohabiting couple households with/without children or other persons (6%), which is lower than the percentage for the State @ 9%
- 6,947 lone parents households (12%), marginally higher than the percentage for the State
- 515 lone parent households with/without other persons (1%)
- 572 multiple family units households with/without other persons (1%)
- 2,307 non- family households comprising of related or unrelated persons (4%)
- 29% of all persons in the 65 years and over age category (or 5,763 persons) were living alone.

### 3.4.4 Essential Housing Services

#### Central Heating

The majority of households in County Donegal used oil (@) 69.7%) as the primary central heating source. Of the 34 local authority areas, Donegal had the fourth highest dependency on oil, after Monaghan (78.4% ), Cavan (72.5%) and then Wexford ( 71%) . The percentage of households using oil to heat their homes in the State was 43.7%.

Other fuels used to heat home in County Donegal included 11.8% using coal (incl. anthracite) and 11.4% using peat (incl. turf). In addition 2.3% used electricity, 1.5% used wood (incl. wood pellets), 1% used natural gas. In addition 703 households (1.2%) in County Donegal stated that they had no central heating (**See Table 1 Appendix 3**).

#### Water Supply

77% of all occupied households in County Donegal are connected to the public mains in 2011 (74.8% in 2006); 10.9% were connected to a local authority group scheme (11.5% in 2006); 1.6% to a private group scheme (2.4% in 2006) and 7.7% to an other private water source (8.9% in 2006)

There are 5,355 households in County Donegal with a private water source (i.e. a private group scheme or other private source) of which 1,368 or 26% of all households were built

since 2001 in County Donegal. 89 households in County Donegal had no piped water in 2011 compared to 140 in 2006 (See Table 2 Appendix 3).

**Sewerage Facilities**

40% of all occupied households in County Donegal were connected to a public sewerage scheme (38.3% in 2006), 52% had individual septic tanks (56.4% in 2006), 3.4% had individual treatment not septic tanks (2.1%) and 0.6% had other types of sewerage facility (0.7% in 2006). 80 households did not have a sewerage facility compared to 163 in 2006.

There are currently 30,383 individual septic tanks within County Donegal. There has been a decrease in the number of septic tanks in houses built in Donegal between the years 2001 – 2005 and 2006 – 2011, where the numbers fell from 4,276 to 3,072 (See Figure 1 (a & b) Appendix 3).

**Internet & Broadband Connections**

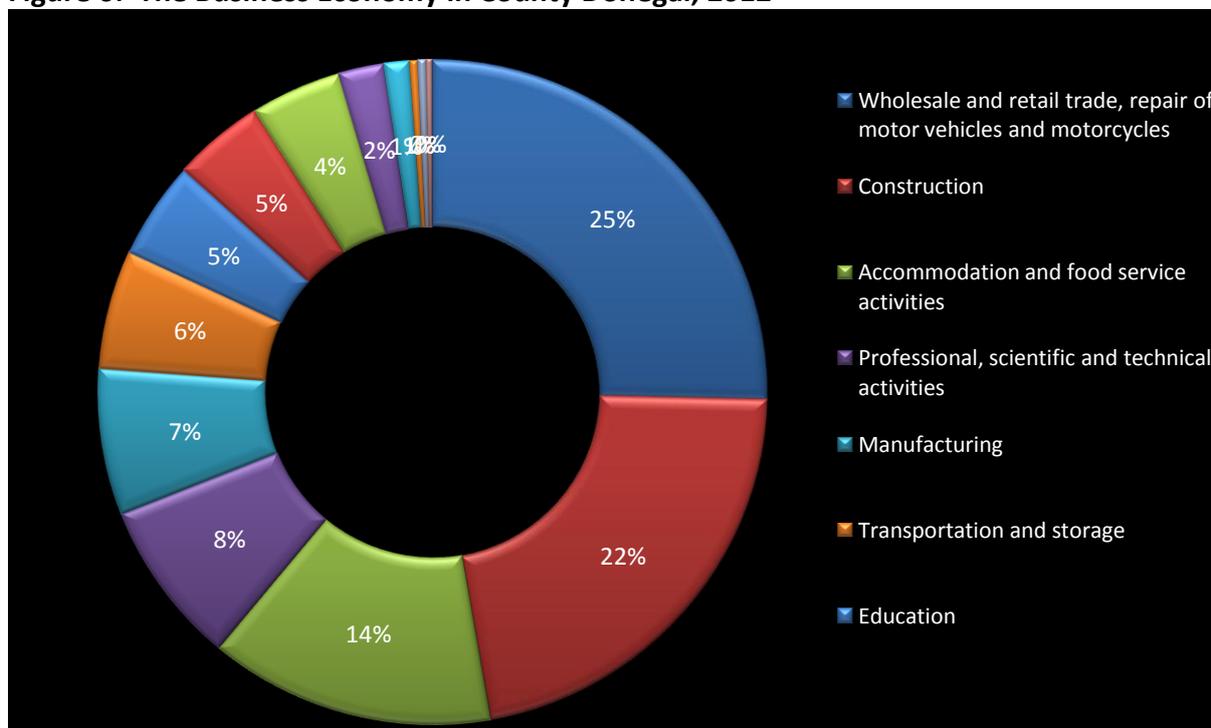
In County Donegal 36,963 households (65%) stated that they had an internet connection, either through broadband or other internet access types. However, 19,662 households did not have an internet connection<sup>viii</sup> and this represents 34% of all households in County Donegal and is larger than the State average of 26%. Of the 19,662, there are 14,533 located in aggregate rural areas and 5,129 located in aggregate town areas. Therefore, 36% of all household in aggregate rural areas do not have internet access in County Donegal, compared to 32% in aggregate rural areas in the State. While 31% of all households in aggregate town areas in County Donegal do not have internet access compared to 23% in aggregate town areas in the State (See Table 3 (a, b & c) Appendix 3)

**3.5 Sustainable Employment Creation**

**3.5.1 Employment Opportunities**

According to the Business Demography Dataset from the CSO, there were 5,166 active enterprises<sup>ix</sup> in County Donegal in 2012 decreasing year on year since 2006, when the number of active enterprises was 7,153. The number of persons engaged in these companies in 2012 was 25,460 while the number of employees was 22,249 persons.

**Figure 6: The Business Economy in County Donegal, 2012**



### 3.5.2 Employment Trends

#### Persons at Work

There was 53, 277 persons at work in Donegal in 2011 a decrease of 3,393 persons (or -6%) since 2006 which is in line with the decrease nationally. The top employment sectors in Donegal were:

- No 1, 'Wholesale and retail trade; repair of motor vehicles and motorcycles' (ranked No 2 in 2006);
- No 2, 'Human health and social work activities' (ranked No 3 in 2006);
- No 3, 'Education' (ranked No 5 in 2006);
- No 4, 'Manufacturing' (ranked no 4 in 2006);
- No 5, 'Agriculture Forestry and Fishing' (ranked No 7 in 2006)

The number of males at work in 2011 was 27, 933, a decrease of 14.9% over the period 2006 – 2011<sup>x</sup>. However, the number of females at work in 2011 was 25,344 females, increasing by 6.3%<sup>xi</sup> over the 2006 – 2011 period.

#### Unemployment

In 2011, there were 18,869 people's unemployed or first time job seekers an increase of 10,447 persons since 2006. Donegal's unemployment rate<sup>xii</sup> increased from 12.9% in 2006 to 26.2% in 2011. Donegal had the highest unemployment rate for any county in the State followed by Longford @ 24.7% and Wexford @ 24%. The unemployment rate for the State also increased from 8.5% in 2006 to 19.0%.

One of the key drivers of Donegal's poor deprivation rates in 2011 is the high levels of male unemployment.

In County Donegal in 2011, males were twice more likely than females to be unemployed or first time job seekers with 12,766 males and 6,103 females unemployed or first time job seekers. Male unemployment rates increased from 14.4% in 2006 to 31.4% in 2011. The female unemployment rate increased from 10.8% in 2006 to 19% in 2011. Both unemployment rates are higher than the rates for males and females in the State @ 22% and 15% respectively.

Youth unemployment is also an issue in County Donegal in 2011, where 32% of the population in the labour force aged between 16 and 35 years of age were unemployed compared to 23% in the State. Further analysis shows, 39.4% of males<sup>xiii</sup> and 23% of females<sup>xiv</sup> falling to the age category were unemployed (**See Table 4 Appendix 3**).

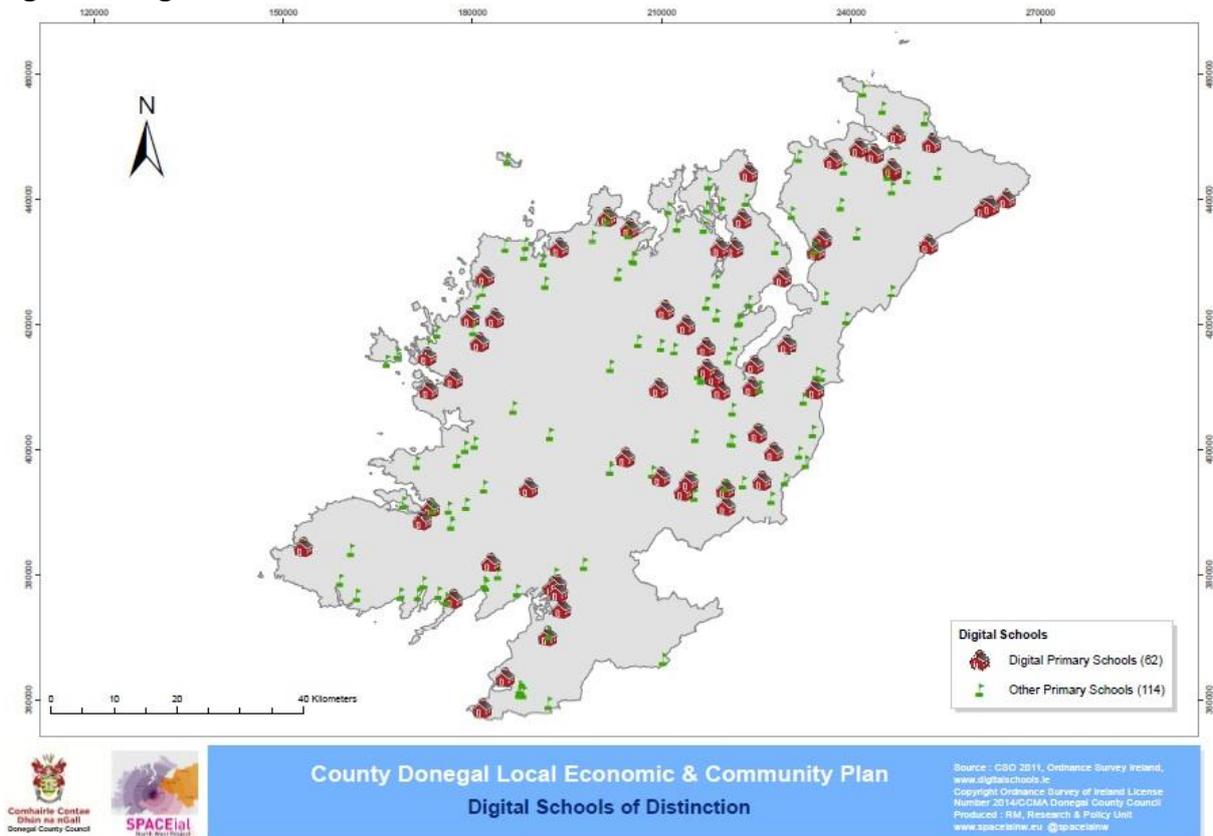
## 3.6 Skills and Human Resource Development

### 3.6.1 Educational Infrastructure

In the academic year 2013-2014, County Donegal had 175 mainstream national schools with a total enrolment of 18,919 students and 2 special schools both of which are located in Letterkenny) with a total enrolment of 154 students.

The Digital Schools of Distinction is a flagship programme which aims to promote, recognise and encourage excellence in the use of technology in primary schools. Figure 7 below, illustrates that there are currently 62 such schools in the process of becoming digital schools in County Donegal. There were 27 post primary schools in 2014-2015, with a total enrolment of 12,854 students.

**Figure 7: Digital Schools of Distinction**



### Third Level Infrastructure

Opportunities in terms of third level education have become more favourable in Donegal in recent years. The Letterkenny Institute of Technology currently has two third level campuses in Donegal; one in Letterkenny and one in Killybegs. The schools of Business, Engineering, Science and Tourism provide a wide variety of programmes with awards right up to Masters and Doctorate levels. The Education Training Board of Ireland (ETB) and An tSeirbhís Oideachais Leanúnaigh agus Scileanna (SOLAS) offer a wide array of courses which are certified. ETB services are delivered throughout the County through a network of training centres including in Stranorlar, Lifford, Gweedore, Ballyshannon, Donegal Town and Milford as examples. The County has effective educational networks and hubs such as in Ballybofey- Stranorlar and Raphoe as evidenced by the presence of primary and post primary education provision, Further Education & Training, the presence of the Regional Training Centre and collaborative partnerships between Finn Valley Centre and LYIT for the future delivery of accredited courses for sports coaches. In addition, further specialised training such as ‘Effective Offshore’, is an offshore training college in Falcarragh and is a significant training location.

#### 3.6.2 Educational Attainment Levels

One of the key drivers of poor deprivation rates within County Donegal is the level of educational attainment and Census 2011 reveals that of all the persons aged 15 years and over in County Donegal, who had finished their full time education :

- 24.9% finished with ‘no formal or primary education’ compared to 15.2% in the State.
- 18.5 % finished with ‘a lower secondary education’ compared to 16.6% in the State.
- 17.3% of person in County Donegal finished their education with upper secondary compared to 20% in the State.

- 16.6% had attained a technical/vocational qualification, an advanced certificate/completed apprenticeship and higher certificate compared to 18.8% in the State.
- 18.2% had attained a third level degree or higher compared to 24.6% in the State.

Although the percentage of persons whose full time education has ceased without formal or primary education in 2011, had improved in County Donegal since 2006 <sup>xv</sup> when ranked amongst all other counties in the State, it still retains its ranking as the County with the highest percentage of persons with 'no formal or primary education'. It is interesting to note that the top 10 counties with the highest ranking of persons with 'no formal or primary education' in 2011 was Donegal (24.9%), Monaghan (20.8%), Mayo (20.5%), Cavan (19.4%), Longford (19.3%), Wexford (18.5%), Offaly (18%), Louth (17.9%), Leitrim (17.6%) and Roscommon (17.3%), were also the same top 10 counties with the highest ranking in this regard in 2006.

Females are more likely to attain a third level qualification or higher in County Donegal in that 22.1 % of all females (11,710) whose full time education has ceased have attained a third level degree or higher in County Donegal compared to 14.4% of all males (7,580). Both percentages are lower than in the State where 27% of all females and 22% of all males whose full time education had ceased had attained a third level qualification.

Males in Donegal are more likely to have lower levels of education than females, in that 27.7% of all males (or 14,577) whose full time education had ceased in 2011 left with no formal or primary education compared to 22% of all females (or 11,784) whose education had ceased.

### **Third Level Qualification by Field of Study**

In 2011, 26,867 persons in County Donegal had attained a third level qualification after completing two or more years of study and this was the ninth highest number in the State in 2011. The top 10 qualifications by field of study in Donegal in 2011 were in:

Rank # 1	Social sciences, business and law, attained by 6,510 persons; (1st in State)
Rank # 2	Health and welfare, attained by 4,724 persons; (2nd in State)
Rank # 3	Education and teacher training attained by 3,979 persons; (5th in State)
Rank # 4	Science, mathematics and computing, attained by 2,998 persons; (4 <sup>th</sup> in State)
Rank # 5	Engineering, manufacturing and construction, attained by 2,763 persons; (3rd in State)
Rank # 6	Nursing and caring attained by 2,347 persons; (7th in State)
Rank # 7	Business and administration, broad programmes, attained by 1,800 persons; (6th in State)
Rank # 8	Humanities, attained by 1,459 persons; (9th in State)
Rank # 9	Accounting and taxation, attained by 1,134 persons; (8th in State)
Rank # 10	Arts, attained by 1,116 persons; (11th in State)

### **3.7 Area Needs Analysis: Increasing Sustainability & Social Inclusivity in Rural Communities**

There are many people in Donegal who form part of our Hard to Reach Communities, whether they living in our most rural locations, our Gaeltacht communities or our coastal and island communities. Throughout the County we also have rising numbers within key vulnerable groups such as our youth and our elderly.

There are many ways to improve the status of those communities by increasing inclusivity through social and economic initiatives and opportunities. Such improvement can only take place through accessing quality services and economic infrastructures. The improvement of such services requires increasing access to:

- **Quality housing**  
Initiatives to improve and upgrade housing to meet building regulations and increase their environmental sustainability
- **Training Programmes and Initiatives**  
Such must be specific to economic opportunities and infrastructure locally so as to enable participants to use the skills attained through such courses.
- **Online services**  
By enabling individuals physical access but also the 'know how' and assistance to use services such as online billing, banking, retail, information services, communication, etc through their local community centre.
- **Enhanced rural transport services**  
Using innovative ways to provide transit for individuals such as community rota systems, safer routes such as off road trails and cycleways, vehicle pooling, working in conjunction with other communities and other services being provided in the locality, e.g. meals on wheels, community nursing, etc
- **Increased Accessibility for those with Disability**  
Initiatives and projects to maximise accessibility so as to enable those with disabilities to integrate and interact with day to day services through multi sensory and highly accessible services and infrastructure
- **Community Centres as Opportunity Hubs**  
Initiatives to increasing viability (reducing running costs and increasing potential income streams) and activities in community centres which provides more opportunities for vulnerable groups to partake in classes, courses and for increased social interaction in general.
- **Employment and Enterprise**  
Initiatives to enable hard to reach communities to tap into increasing economic opportunities from tourism such as providing accommodation, tours on local cultural and heritage, shops, cafes, outdoor recreation enterprises, etc. Such projects may include the reuse of buildings for such uses, the development of tourism products, etc.



#### 4.1.1 Natura Sites

Natura 2000 Sites comprise a Europe wide network of especially important areas which are designated under either the Habitats Directive to protect and conserve habitats and species of particular importance as Special Areas of Conservation (SAC's) (such as red deer, bat species) or under the Birds Directive to protect birds and particularly rare listed and vulnerable species (corncrake, cattle egret).

Natura 2000 Sites	Number of Sites
Special Areas of Conservation (SACs)	47
Special Protection Areas (SPAs)	25
Total	72

Comparative to the national ratio of Natura 2000 sites, Donegal has a significant share of our most internationally important sites; Donegal comprises 7% of the land cover of the Country as a whole, yet has 12.3% of the entire Country's SAC designated sites. County Donegal has the largest population of Corncrake in Ireland. Also protected under the directive are wetlands, especially those of international importance, that attract large numbers of migratory birds. Lough Swilly is one of the most important wetlands for birds in Ireland with 22 waterfowl species in nationally important numbers and three species in internationally important numbers. There are 122,900 hectares of SAC designated lands and 26,650 hectares of SPA designated lands which, overlap in parts and when taken together comprise of 124,921 hectares of Natura 2000 sites, or 25.7% of all land County Donegal's land coverage. Species whose status is a cause for concern are specifically identified for special conservation measures in Annex I of the Birds and Habitats Directives. 61 Annex I habitats are found in Ireland, 41 of which are represented in County Donegal. Of the 16 listed priority habitats found in Ireland and 9 of these are found in County Donegal's SACs.

#### 4.1.2 Natural Heritage Areas and Other Wildlife Reserves

Natural Heritage Areas were established under the Wildlife (Amendment) Act 2000 and represent the basic designation for wildlife protection. They were derived from Areas of Scientific Interest (ASI) and include some of the best remaining areas of natural and semi-natural habitat in the County. Sites may have been selected on the basis of having special scientific significance for one or more species, communities, habitats, landforms, geological or geomorphological features, or a diversity of natural attributes.

Designation	Number of Sites
Natural Heritage Areas (NHAs)	14
Proposed Natural Heritage Areas (pNHAs)	74

There are many other wildlife protection areas in the County. These include Glenveagh National Park, numerous Ramsar Sites, Nature Reserves, Wildfowl Sanctuaries, a Wildfowl Reserve, a Biogenetic Reserve and a Refuge for Fauna.

**Glenveagh** is one of 6 National Parks to be found in the state. It is the second largest in size comprising of 16,958 hectares of rugged mountain, blanket bog and pristine lakes. The park is a significant ecological, recreational and educational asset to the County. The parks appeal and value is immense, exemplified in the fact that it remains the largest tourist attraction in Co. Donegal. The park is served by a highly skilled and experienced team of conservation rangers. Wildlife rangers are also employed to cover 6 regions within the County in terms of monitoring, managing and protecting wildlife.

**Ramsar Sites** were established as a result of the Ramsar Convention, the mission of which is ‘the conservation and wise use of all wetlands through local, regional and national actions and international cooperation, as a contribution towards achieving sustainable development throughout the world’. There are 45 such sites in Ireland with 4 sites in Donegal.

**Natures Reserves** are protected under Sections 15 and 16 of the Wildlife Act 1976. These areas are set aside for the conservation of fauna, flora and their habitats. The majority are state-owned, however, some are in private ownership. There are 9 Nature Reserves in Co. Donegal.

**Wildfowl Sanctuaries** are protected under the Wildlife Act 1976 (Open Seasons) Orders where shooting is prohibited so that game birds can feed undisturbed. There are 6 Wildfowl Sanctuaries in Donegal.

**Biogenetic Reserves** are designated to act as ‘living laboratories’ and are representative examples of various types of natural environment in Europe. The concept was launched by the Council of Europe in 1973. The Biogenetic Reserve network comprises 344 established in 22 Countries. 14 sites have been designated in Ireland, one of which the Pettigo Plateau Biogenetic Reserve is located in Donegal.

**Refuges for Fauna** are designated under the Wildlife Act 1976 to protect named species of wild animal (vertebrate or invertebrate). There are 7 such refuges in Ireland to protect 22 named species. One such refuge is in Horn Head, County Donegal, designated to protect 16 breeding bird species on the cliffs and small islands where there is no threat of potentially damaging activities due to the sites inaccessibility.

#### 4.1.3 Geology and Landscape

According to geologists such as J.B. Whittow, Donegal is one of the most geologically complex areas in all of Ireland. As geology is an intrinsic part of our natural heritage, the conservation and promotion of our most important geological features is essential. The Heritage Act and planning legislation in particular, place responsibility upon Local Authorities to ensure the protection of the geological heritage within planning policy. Whilst many of our sites of geological and geomorphological importance are protected as part of Natural Heritage Areas, other important sites are designated as Irish Geological Heritage (IGH) sites. There are 145 such sites in the County, from the Gweebarra fault to the oldest rocks in Ireland found on Inishtrahull Island off Malin Head.

Donegal is a land of breathtaking natural beauty with a long picturesque coastline, mountains, hills, rivers, lakes, valleys and unspoilt natural habitats. ‘The Beautiful Scenery’ is the top reason for tourists choosing to holiday in Donegal/Sligo, according to *Failte Ireland’s Holidaymaker Study 2013 – Donegal/Sligo*. In the same study ‘Natural Environment’ scored highest in terms of their overall experience, while 80% of respondents gave the ‘Beautiful Scenery/Countryside’ as their reason for recommending the area. These figures serve to highlight the significance of protecting and promoting our landscape in the sustainable development of the tourism sector in Donegal.

Landscape Character Assessment (**LCA**)<sup>10</sup> is key to implementing a comprehensive landscape management strategy for the County. While projects should seek to harness the significant benefits from our landscape by promoting awareness of and increasing access to its beauty, it is crucial that such initiatives ensure that the integrity of our scenic areas are not compromised. The County Development Plan 2012-2018 gives a commitment to carry out

<sup>10</sup> A Landscape Character Assessment was carried out to establish the levels of Landscape Sensitivity in the County that would inform future development in the County.

an LCA for the County. This assessment will inform on the ‘capacity’ of a particular landscape type or area to accommodate change without significant effects on its character, or overall change to the landscape character type.

## 4.2 Our Water Resource

Clean water is one of the most important elements for life. This is critical not only to our own human existence, but also to sustain plant and animal life. Therefore it is essential that we maintain and enhance the quality of our groundwater, rivers, lakes and coastal waters. It is also important that we identify pollution sources in order to develop strategies to reduce such occurrences including potential threats from agriculture, wastewater, industry etc. We must ensure that human impact on our rural environment is managed so we can maximise opportunities for growth and development particularly in terms of tourism and diversification in rural Donegal. Adequate water treatment and supply and adequate wastewater collection and treatment are key parts of the infrastructures essential to economic, social and environmental development in Donegal.

### 4.2.1 Waterbody Quality

The Environmental Protection Agency has classified surface water bodies into five designations; High status - Good status - Moderate status - Poor status - Bad status. One of the primary aims of the Water Framework Directive (Article 4) is to achieve good surface water status by 2015. If a waterbody is already classified as ‘good status’ or ‘high status’ then it should be maintained; there can therefore, be no deterioration in quality.

The water quality status of the waterbodies monitored in the County are:

Waterbody	Bad	Poor	Moderate	Good	High	U/A	Total
River Segments	4	108	110	224	86	0	532
Loughs	0	1	14	47	56	0	118
Coastal Waters	0	0	7	6	3	8	24
Transitional Waters	0	0	8	2	5	6	21

Of the 40 groundwater reserves in the County all have a ‘good’ water quality status.

### 4.2.2 Supply of Drinking Water

In Donegal, 97% of drinking water is from surface waters, while 3% is sourced from groundwater. In 2013 there were 73 water schemes in the County supplied from 178 reservoirs using 4,366km of water main via 175 pumping stations. Figures show that 84.5% of the population in the County are served by public water schemes, with 12% served by private wells and the remaining 3.5% either by group schemes or other small private schemes (See Table 2 Appendix 4).

There currently are 16,445 non-domestic water connections in the County. Of this figure there are 1,060 connections which have a fixed charge of water. This figure is made up of 65% in agriculture, 20% in commercial and 15% in holiday and leisure. Of the total number of connections which are metered; 43% are in agriculture, 32% in commercial, 13.6% in holiday and leisure, 6.4% in industrial and 5.9% in institutional.

### 4.2.3 Quality of Drinking Water

In Donegal in 2013, the compliance rate for microbiological parameters (such as coliform bacteria, e-coli, specific pathogenic bacteria) was 100%, while the compliance rate for chemical parameters (such as bromate, lead, fluoride, trihalomethanes, etc) was 99.1%. The Environmental Protection Agency (EPA) publishes a Remedial Action List each quarter focusing attention on resolving the most serious deficiencies in public water supplies across the Country. Since 2013, 10 public water supplies in Donegal serving a total population of 39,508 persons have remained on the Remedial Action List (See table 3 Appendix 4). These supplies require significant investment to ensure compliance with quality standards. In addition a number of other public water supplies, which did not comply with standards in 2013 included: Buncrana, Burnfoot, Cranford, Fanad East, Frosses-Inver, Inishowen West, Killybegs, Lettermacaward, Lough Mourne, Pollan Dam, Rosses, Ballymagroarty, Churchill, Gleneely and Meenreagh.

In general in Ireland the quality of private group schemes continues to improve, however these schemes remain inferior to public water supplies. Small private supplies showed an increase in e-coli non-compliance, from 7.7% of supplies in 2011 to 11.3% of supplies in 2012. Water infrastructure is necessary for economic growth and development. Irish Water plan to invest just under €10 million in Donegal's water infrastructure over the next number of years (See Table 4 Appendix 4). However, not all water schemes fall under the remit of Irish Water, therefore it is important that any opportunities that exist locally to resolve issues regarding capacity and/or quality of supply through public, private and community partnerships are to be encouraged. This is particularly applicable for smaller schemes which have not been transferred to Irish Water. A review of such schemes in terms of their capacities and quality is required to enable potential opportunities to upgrade or enhance such services. Proposals for initiatives such as these are welcomed for discussion.

### 4.2.4 Water Usage and Unaccounted for Water<sup>11</sup>

In 2010, the water consumption level in the County was 5,168,636m<sup>3</sup>. This figure decreased slightly to 5,149,697m<sup>3</sup> in 2012. It rose by 480,927m<sup>3</sup> in 2013 and decreased the following year in 2014 to 5,157,934m<sup>3</sup> (Laboratory Section, Donegal County Council 2015). The loss of treated drinking water through leakage, etc is a significant issue in Ireland. The level of such water loss is substantially higher than in Northern Ireland, Scotland, etc. Unaccounted for water (UFW) is calculated as a percentage of total volume of water supplied. Between 2008-2013 Donegal's average 'Unaccounted for Water' rate was 45%.

2008	2009	2010	2011	2012	2013
43%	46%	53%	45%	40%	42%

### 4.2.5 Wastewater Network

There are 97 wastewater schemes in Co. Donegal with 105 treatment plants. 9 large urban areas in Ireland did not meet the European Union Directive requirement to provide secondary treatment, 3 of these were in Donegal: Killybegs, Bundoran and Convoy. There are a further 16 smaller urban areas in Donegal without secondary treatment. These included; Falcarragh, Kilcar, Moville, Ramelton, St Johnston, Burtonport, Coolatee Housing Scheme & Kerrykeel, Killybegs which failed to meet the standard for nutrients in waste water discharged to sensitive areas from larger towns (>10,000).

<sup>11</sup> Local Authority Service Indicators, Annual Reports 2008-2012

In 2013 there was one area in Donegal where effluent samples taken by the EPA in 2013 did not comply with the effluent quality standards in the waste water discharge licence, that being Milford.

Wastewater is a key infrastructure necessary for economic growth and development. Therefore, deficiencies in networks and treatment are required to facilitate growth in many areas of the County. Irish Water's strategic investment programme aims to invest over 46 million up to 2020 in water and wastewater infrastructure in Donegal (See Table 5 Appendix 4).

However, not all wastewater schemes are under the remit of Irish Water, therefore it is important that any opportunities to resolve issues regarding capacity and/or quality of supply through public, private and community partnerships are to be encouraged. This is particularly applicable for smaller schemes which have not been transferred to Irish water.

### **4.3 Renewable Energy Resources**

#### **Wind Energy**

Wind power and biomass are by far the most common form of renewable technology used in the North West Region. Donegal hosts the optimal conditions for development of such technologies, particularly wind power with regard to wind speeds. Large scale wind farms are common in the region and produce well above the national average of wind energy. Donegal, Derry and Tyrone combined produce 25% of Ireland's wind power. Donegal is 2<sup>nd</sup> in terms of production next to Cork. Donegal is ranked 11<sup>th</sup> in the 2011 table of Microgeneration from PV and Wind produced by SEAI. However, wind resource is not a factor in placing Donegal 11<sup>th</sup> on this table. (Ren Net – Renewable Energy Business Network; Interim Evaluation Report 2014).

In 2010, Donegal was producing approximately 15% of electricity from renewable sources. The Government have established an ambitious target to increase this nationally to 40% of by 2020, with wind energy providing a significant contribution to that target (5,500MW) (Donegal County Development Plan 2012-2018 (as varied)). Of the 1,803MW of power which is currently generated by wind farms in Ireland, 279.65MW is generated in Donegal from a total of 28 wind farms.

#### **Wave Energy**

There is a notable wave energy resource off the coast of Donegal. To harness and benefit from this significant renewable resource there is a need to install the necessary supporting grid infrastructure.

Pilot projects will necessitate the identification of network connection points with appropriate capacity and transmission infrastructure. Ireland has the potential to become a world leader in the manufacture and use of ocean energy systems and has 3rd Level research expertise in the areas of turbine design at University of Limerick, wave tank model testing at University College Cork and wave energy modelling at Queen's University, Belfast. In terms of prototype development, there are currently three wave energy developers in Ireland. The Government has indicated that Ireland should become a world leader in renewable energy, as these are unparalleled ocean resources which position the Country at the forefront in the development of full-scale, commercially viable ocean wave energy generating facilities.

### **Biomass and Bio-crops**

Biomass is the biological material derived from living, or recently living organisms. For centuries people in Donegal relied upon our natural resources including peat as a source of fuel and seaweed for the fertilisation of crops. While the harvesting of peat is increasingly unsustainable there is a wide range of sustainable and affordable alternatives. The County has large areas of sustainable managed commercial forestry which has potential for use as wood fuel for both domestic and commercial markets. In addition, the growth of interest in energy crops such as willow, rape seed and miscanthus, all represent alternative biofuel opportunities which are viable and already growing in the County. It is notable that the Department of Agriculture provides grant support for the growing of willow and miscanthus. South West College in association with the Answer Project have developed an application which provides data on low medium and high suitability for growing willow throughout Donegal. Opportunities exist in Donegal for communities to tap into Bio Remediation through Willow.

### **Fossil Fuel**

It is key Government policy to encourage investment in offshore oil and gas exploration. A number of exploratory prospecting licenses have been issued to companies for the Slyne and Rockall basins, 150km of the Donegal coast. In addition, in 2010 the Government invited applications for onshore licensing options over the North West Carboniferous Basin (an area of approximately 8,000 sqkm, which includes the area south of the River Erne in Ballyshannon and around Bundoran).

An opportunity exists to expand and develop the roles of Killybegs and Donegal Airport as strategic maintenance service facilities for offshore activities. Ireland currently imports 96% of its gas supplies from Europe via an interconnector from the UK. If commercially viable hydrocarbon reserves are discovered then exploration and production activities must be subject to rigorous assessment and safe and tested procedures. Nationally the supply of gas will be strategically supplied through inter-connections between Ireland and the UK, which will secure sufficient gas supplies for the foreseeable future. A new gas pipeline has been constructed from Belfast to Derry and the Council would support the extension of existing services into the County.

## **4.4 Area Needs Analysis: Protecting and Harnessing our Natural Heritage & Water Resource**

### **Sustainable Access and Promotion**

The natural heritage of the County is a key asset for local, national and international tourism. Sustainable access to and promotion of these assets are central elements to its further development. In conjunction with NPWS locally, there is an array of ways in which our natural environment can be accessed. Opportunities exist to develop and enhance these various means such as bus tours, packages, guided hiking and cycling, boating, watersports, trail development, bike, segway hire, beach access, whale and dolphin watching, interpretative on site and online promotional resources. Natural heritage tourism can be combined with cultural and built heritage (Chapter 6) such as folklore, archaeology, genealogy, architecture and history to provide a more comprehensive tourism offer.

### **Developing a Hub to Donegal's Biosphere**

The rich and diverse range of geology, landscape and habitat has created a truly unique biosphere across the entire County. Only in recent years has an awareness of some of these

unique elements begun to emerge. Therefore a real and present opportunity exists to develop a 'Natural Network' for the County's biosphere.

- Such a network would serve to 'join up' the unique designations and eco locations across the County for the purposes of protection and promotion through information and access.
- The development of such a tool presents the opportunity to build on Glenveagh's unique comparative advantage so that it can develop further as the 'biosphere hub' for the region.
- The key towns in the regions have the potential to develop as central access points from which the richness of satellite locations can be experienced.

Glenveagh's Nature Education Centre runs a range of programmes aimed at children across a range of age groups to educate and develop young people's appreciation of the natural world. Opportunities exist to develop educational programmes and information initiatives across a range of ecological areas and locations. These will serve to increase promotion and conservation across the County's biosphere network.

### **Small Scale Water & Wastewater Infrastructure**

Explore collaborative opportunities to upgrade water and wastewater infrastructure in particular small scale private or public schemes that are not under auspices of Irish Water, where small investments or targeted measures would enable commercial and tourism development to take place.

### **Our Environment as a Cross Cutting Theme**

As part of the implementation of the LEADER programme, the promoting, protecting and enhancement all areas of our environment must be considered across all emerging objectives and projects.

All LEADER Projects and Initiatives should be screened to identify opportunities where environmental enhancement measures can be incorporated into the project. Such enhancements may include for example, measure to:

- increase water protection and conservation,
- pollution reduction,
- low impact methods for development,
- facilitation of native species,
- sustainable waste management,
- increased energy efficiency,
- use of renewable energy

## Chapter 5 Donegal's Primary Sectors

### 5.0 Developing a Vibrant Local Food Economy

Consumer spending patterns are crucial to local economic performance. Research by the London Economics Foundation has found that every €10 spent in a local food business is worth €25 to the local economy. Therefore, a substantial multiplier effect occurs when money is circulated locally.

According to projections from the TASTE Council, by 2020 the existing base of Artisan and Speciality Food Firms have the potential to double their output from 3 – 6%, increasing their market share from 3 – 6% resulting in the creation of new jobs for the local economy. The potential of the food sector in assisting with the development of a vibrant local food economy in Co. Donegal is high.

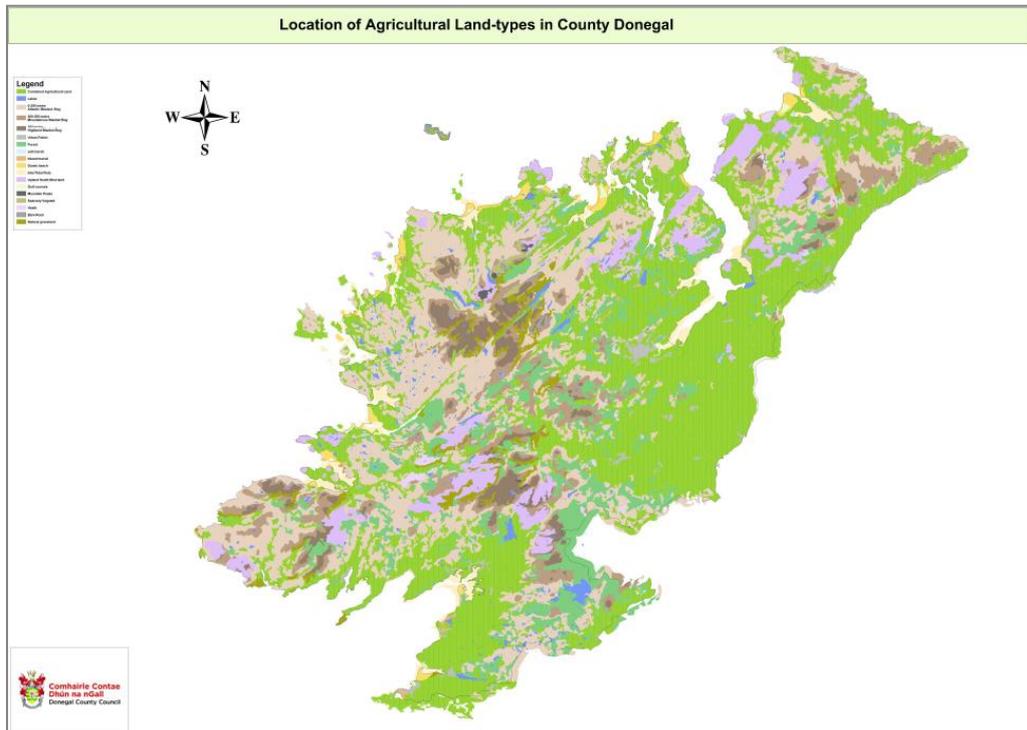
This chapter will examine different aspects of Donegal's Food Resource to demonstrate the potential it offers for farm diversification, creation of rural enterprises, development of rural tourism and the long term sustainability of rural communities.

### 5.1 A Picture of Agriculture in Donegal

On the basis of rural extent of the Donegal landscape, agricultural activity has for many decades been a primary sector of economic and social importance in the County and its intensity in terms of land use is most notable as a primary economic sector in the Stranorlar MD. This is particularly evidenced by the predominance of agricultural land types in the east of the County shown coloured green on Figure 1 and furthermore through the growth in agri- business and agri- food particularly in the Stranorlar MD such as Aurivo Cooperative Society Ltd at Killygordon, Green Pastures Creamery at Convoy, Smyth Daleside Animal Feeds at Ballindrait and Clonleigh Co-Operative Agriculture Society Ltd at Castlefinn. However, over the years agricultural activity has changed in Donegal. Changes in farming techniques, changes in market demands together with an ever aging farmer population as seen the need for a more focused and structured move toward farm diversification.

**Figure 1: Location of agricultural land types in County Donegal.**

(Sourced from the draft Landscape Character Assessment of County Donegal, 2015- the map shows the predominance in the east of the County, of agricultural land types (shown in green)).

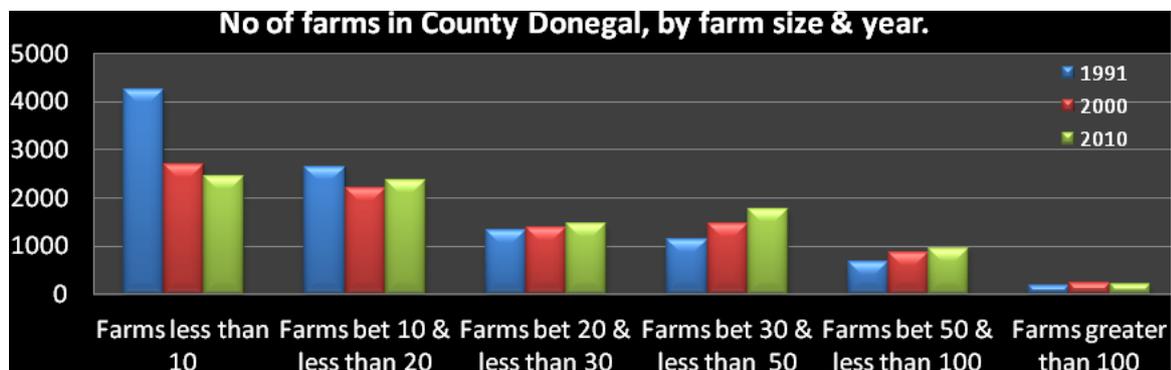


**5.1.1 Agricultural Trends**

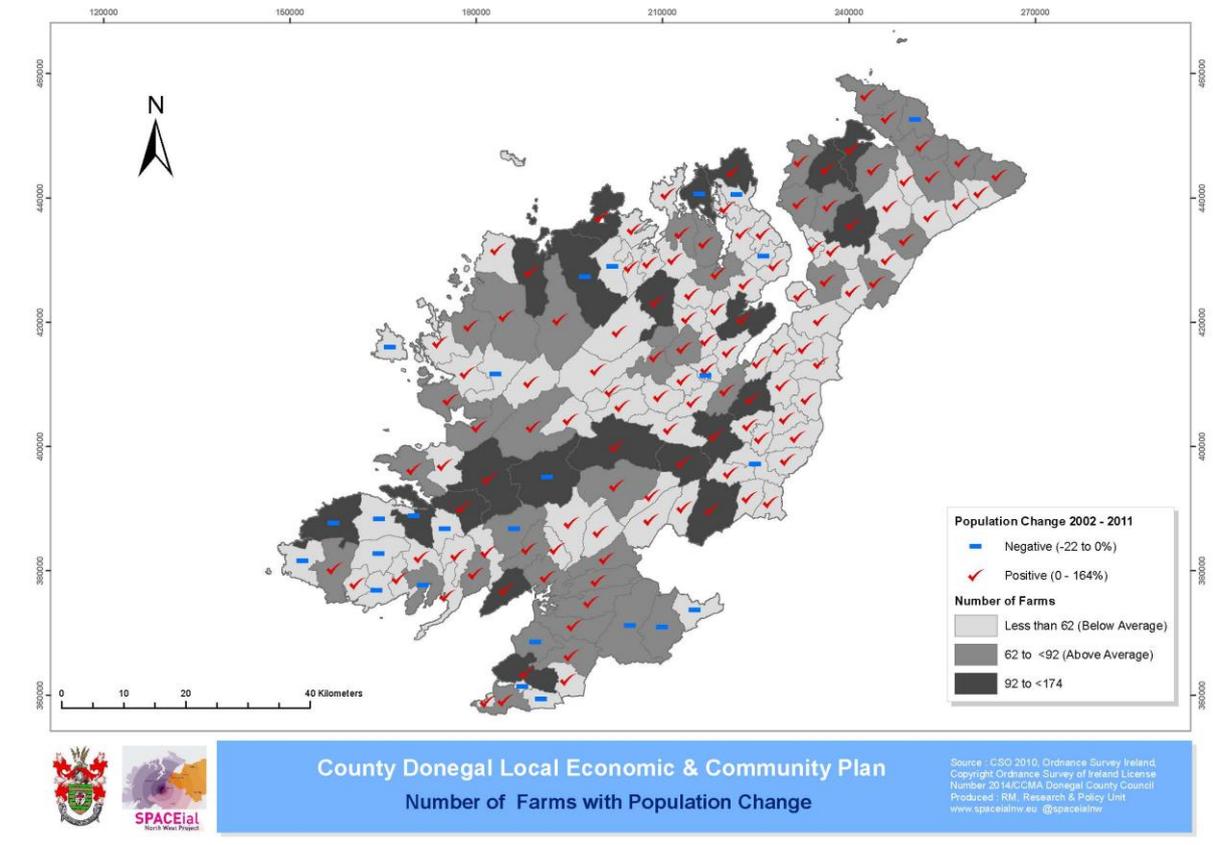
**Farm Numbers**

There were a total of 9,240 farms in County Donegal in 2010, decreasing by 4.9% (435 farms) over the 2000-2010 period and by 9.7% (988 farms) over the 1991-2010 period. The total number of farms decreased by 1,667 in the State over the 2000-2010 period. Farm sizes are also increasing in County Donegal, from an average farm size of 26.2 HA in 2000 to 27.9HA in 2010. For example, in 1991 there were 41.6% of farms less than 10 AAU compared to 26.5% in 2010. In addition, farms between 30 and 100 AAU increased from 17.8% in 1991 to 29.7% in 2010. The average farm size in the State in 2010 was 32.7 Ha. (See Figure 1)

**Figure 1: No. of farms in Donegal by farm size and year**



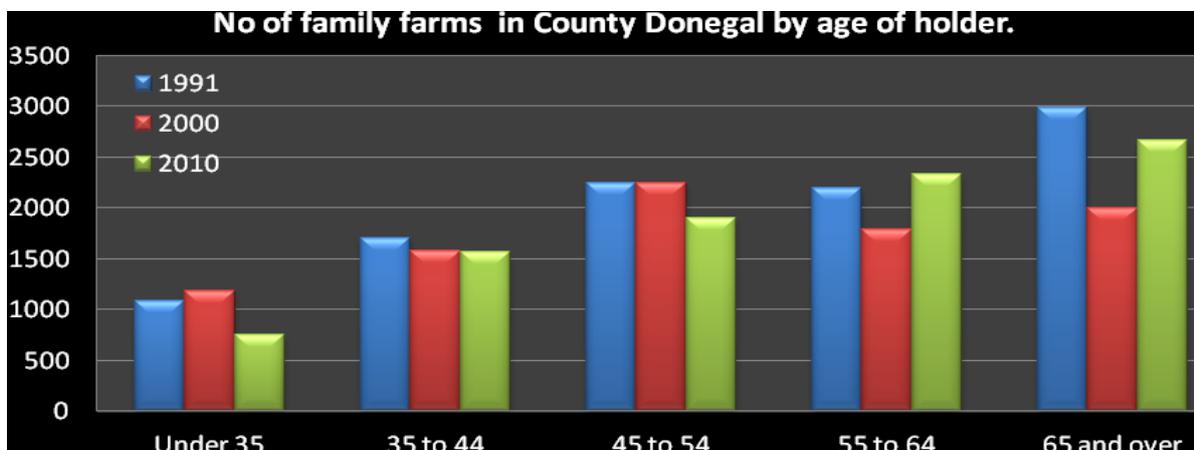
**Figure 2: No. of farms with population change**

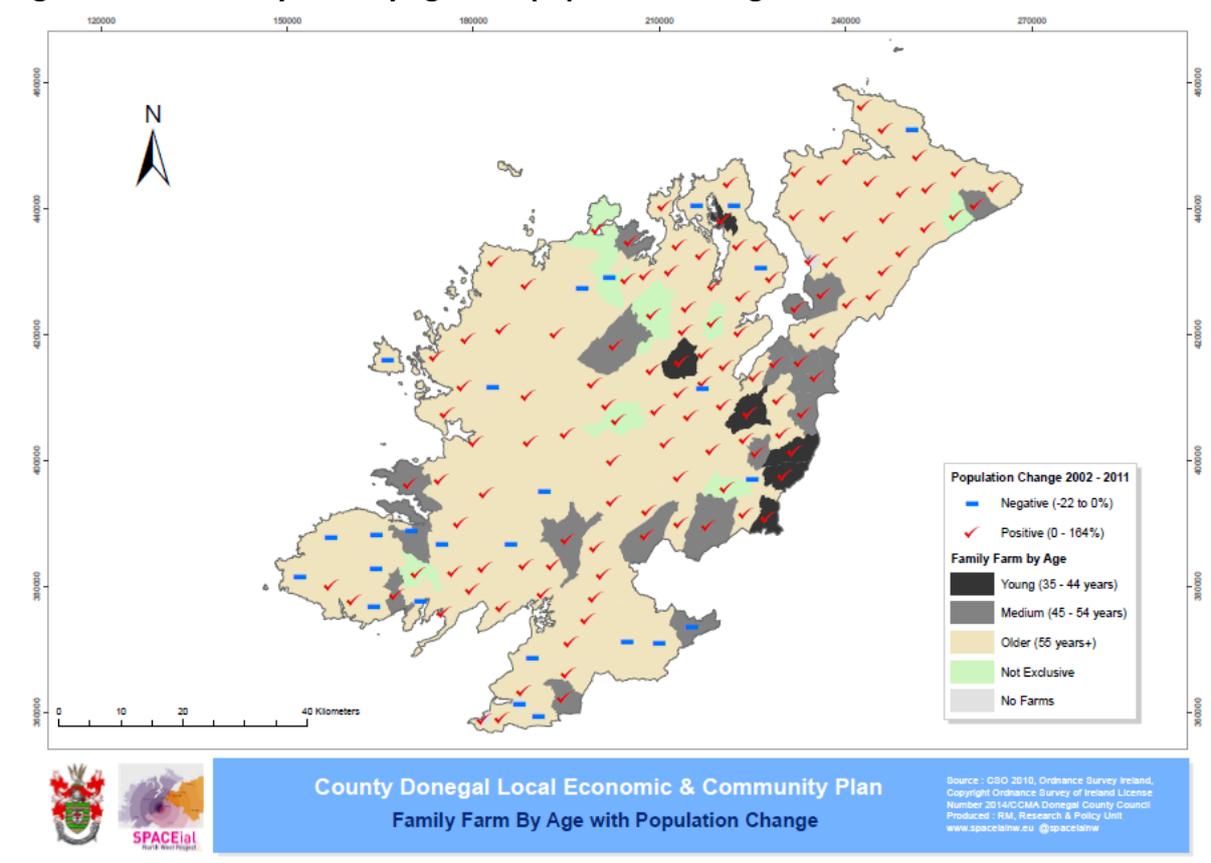


**Age of Holder**

More than half (54%) of all farm holders in County Donegal were aged 55 years or older in 2010, compared to 43% in 2000. In 2010, 29% were aged 65 years and over compared to 23% in 2000, the comparable figure for the State was 26% in 2010. The numbers of holders aged less than 35 years has decreased from 13.4% to 8.2% over the 10 year period in County Donegal; however this decrease is not as severe in the State, where numbers almost halved (See Figure 2, 3 & 4).

**Figure 3: No. of family farms in County Donegal by age of holder**



**Figure 4: Family farm by age with population change****Farm Workers**

The number of persons working on farms in County Donegal increased by 10% over the period 2000-2010, from 13,975 to 15,503 persons. The corresponding increase for the State is 6%. Although, there was an increase in the actual number of holders, spouses, other family members and non family regular labourers; the largest driver of this change was in other family members increasing by 665 persons. Of the 15,503 persons engaged in farming in County Donegal, 14,734 were family workers (95%) and 769 were regular non-family workers (5%). Collectively this workforce provides 8,970 annual work units. One annual work unit = 1,800 hours or more of labour input per person per annum (See Table 1).

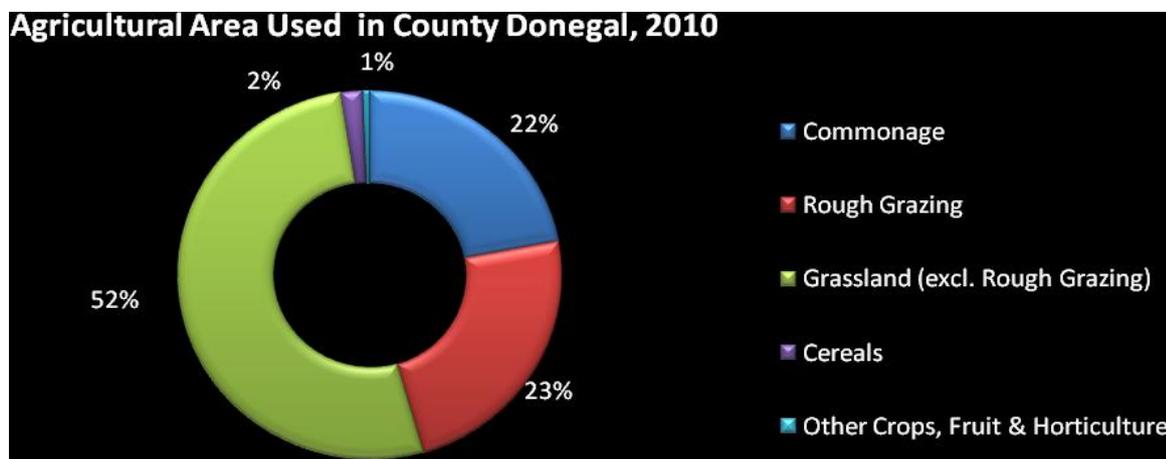
**Table 1: Farm labour input by number of persons and Annual Work Units (AWU)**

Persons / AWU	1991	2000	2010
Holder: Persons	10,214	8,804	9,222
Holder: AWU	7,944	6,189	6,177
Spouse: Persons	3,068	1,820	2,104
Spouse: AWU	2,120	957	890
Other Family: Persons	2,693	2,743	3,408
Other Family: AWU	1,824	1,250	1,477
Non Family Labour:Persons	437	608	769
Non Family Labour:AWU	337	277	427
Total Persons	16,412	13,975	15,503
Total Farm AWU	12,224	8,672	8,970

### Agricultural Area (incl. Commonage)

Of the 330,770 agricultural area used in County Donegal, 52% was for grassland (lower than the State @ 76%); 23% was for rough grazing (higher and the State at 9%); 22% was for Commonage (higher than the State @ 8%); 2% was for Cereals (lower than the State @ 5%) and 1% was for Other Crops (lower than the State @ 2%) See Figure 5.

**Figure 5: Agricultural Area Used in Donegal 2010**



### 5.1.2 Agricultural Produce & Markets

#### Key Farm Produce

**Potatoes** – 240 farms in Donegal produce potatoes; this is more farms than any other County in the State. Across these farms 1,201 ha of potatoes are grown, making Donegal the fifth highest potato producing County in the State.

The potato is of immense historical, commercial and cultural significance. Few plants have had as strong an influence on the destiny of a nation as the potato has exercised in Ireland. The Tops Potato Propagation Centre in Raphoe comprises the National Potato Genebank. Here an extensive collection of over 400 unique potato varieties are maintained, the oldest of which pre-dates the Irish Famine, with old and modern Irish varieties and varieties from abroad providing a living legacy of our long association with the potato. The Potato Propagation Centre forms part of DAFM Seed Certification Division. It produces approx. 30,000 minitubers from virus-free microplants, tests micro plants, mini tubers and seed crops for a range of viruses and conducts potato disease trials. The work at the centre ensures a healthy supply of seed potato is available and certified as well as ongoing development to eliminate potato virus and disease.

Teagasc's Strategic Plan 2015 – 2020, highlights that tillage farming in the region is located mainly in east Donegal and historically this was associated with seed potato production. The area under seed potatoes peaked at 1600 hectares, but has since been reduced to 295 hectares due to poor profitability and rejection of crops for diseases such as Blackleg etc. Over the last number of years the county has also seen a reduction in the area under ware potatoes due to price volatility and low profitability, while consumption is also declining, with potatoes being substituted with rice and pasta.

**Cattle** – Average herd size in County Donegal in 2010 was 36 cattle per farm compared to 60 cattle per farm in the State. 34% of cattle (34,474) on farms in County Donegal were kept for breeding purposes, of which 15,456 (24%) were dairy cows. 66% fell into the other cattle categories. (5298 farms)

**Sheep** – Sheep farming plays a significant role in the rural economy of Co. Donegal. With just under 426,000 sheep across 5,280 flocks, Donegal has significantly more sheep and the greatest number of flocks of any County in Ireland.<sup>12</sup> 12% (576,463) of the National flock were in County Donegal, with an average flock size of 114 sheep per farm (5,042 farms).

**Pigs, Poultry & Deer** – Donegal had 38,525 pigs on 60 farms, giving an average of 642 pigs per farm compared to the State average of 1,254. Donegal had 38,525 pigs on 60 farms, giving an average of 642 pigs per farm compared to the State average of 1,254. Donegal had 28,962 poultry on 420 farms, giving an average number of 69 poultry per farm. In addition Donegal had 10 farms with 85 farmed deer.

**Equine** – In 2014 more than a third of calls made to the Irish Society for the Prevention of Cruelty to Animals (ISPCA) were requests to assist horses or donkeys in County Donegal. In the same year Donegal County Council dealt with a further 13 abandoned equines, bringing the total to 56. The numbers of horses and donkeys requiring re-homing or removing from premises in the County in 2014 was 147 up 28% on 2013. The ISPCA have called for horse owners in the County to cease breeding their animals as a first step in tackling the current crisis. These welfare problems derive from the excessive numbers of equines bred and brought into the County from 2000-2007 and the subsequent collapse of the horse and pony market nationally.

The Irish Horse board has identified performance horses and ponies as the largest and most important export market in Ireland. The Horse Board facilitate this market through assisting international purchasers with the shipping cost associated with exporting such animals from Ireland. The performance related areas include jumping, hunting, polo and show ponies, cross country, eventing, driving, etc, across a range of breeds such as Irish Sport Horse, Irish Draught and Connemara Ponies.

### Farmers Markets

Country Markets has been a co-operative business for over 60 years. It is a national organisation with branch markets in most counties in the country. These indoor markets generally operate one day a week to market the shareholders' fresh farm, garden and home produce and handcrafts. There are a number of farmers markets that take place around Donegal each week.

Bridgend	Harrys Restaurant	Saturday	10.30am - 2.30
Buncrana	Church of Ireland Hall	2nd & 4th Sat	2.00 - 3.00pm
Carrick	Old School	Saturday	11.00am
Dunfanaghy	Ozanam Centre	Saturday*	11.00am – 12.00pm
Kilclooney	Dolmen Centre	Saturday	11.00am
Leghowney	Leghowney Hall	2nd and 4th Saturday of month	11.00am
Ramelton	Town Hall	Saturday	11.00am
Ramelton	Market Square	Every 2nd Friday	10.00am

**Source:**<http://www.bordbia.ie/consumer/aboutfood/farmersmarkets/Pages/CountryMarkets.aspx>

<sup>12</sup> National Sheep & Goat Census 2013, DAFM

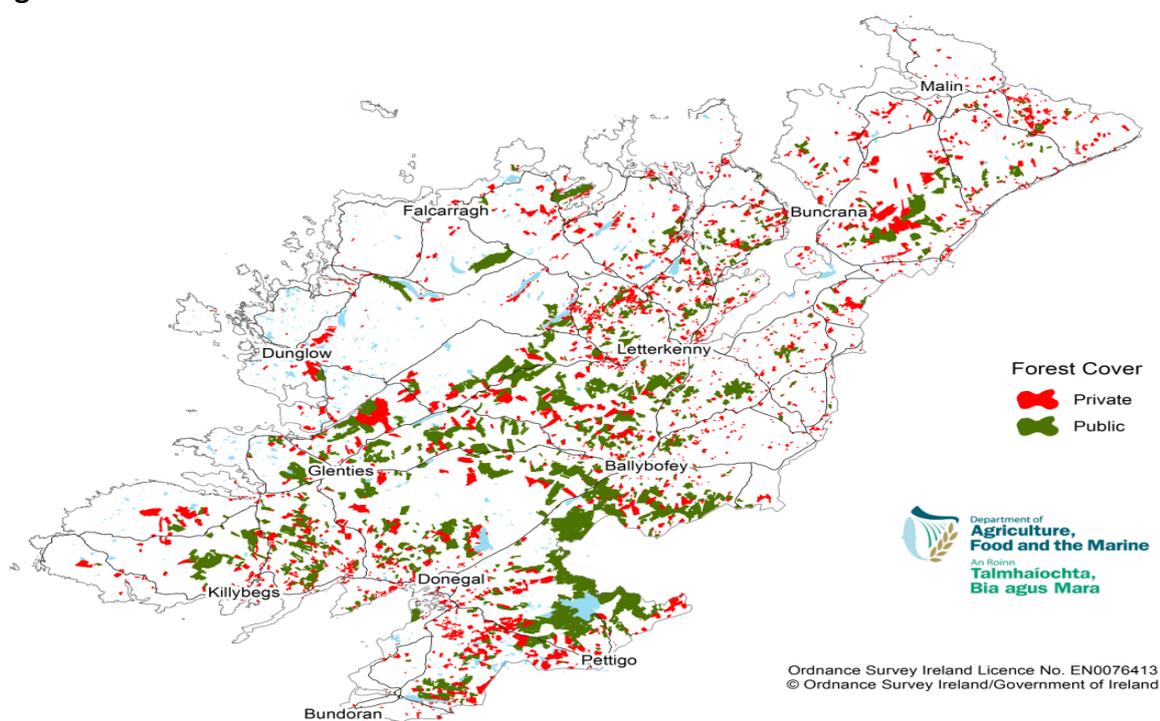
## 5.2 Forestry

Forestry and woodlands in County Donegal present considerable opportunities<sup>13</sup> for the development of rural areas in Donegal and the North West Region.

Provides an opportunity to increase farm viability through diversification into primary wood production and value added wood products whilst also helping to meet the demand for access to rural amenities, activity and adventure tourism.

The development of forestry and woodlands in Donegal also assists in tackling environmental challenges through sustainable land use and eco-system management. At a time when Donegal needs to reduce its dependency on oil as an energy source, forestry provides significant opportunities for the development of the whole Biomass<sup>xvi</sup>/ Wood Energy Sector whilst forests also sequesterate CO<sup>2</sup> emissions from the atmosphere.

**Figure 6: Forest Cover Public and Private 2011-2012**



### 5.2.1 Forestry Ownership

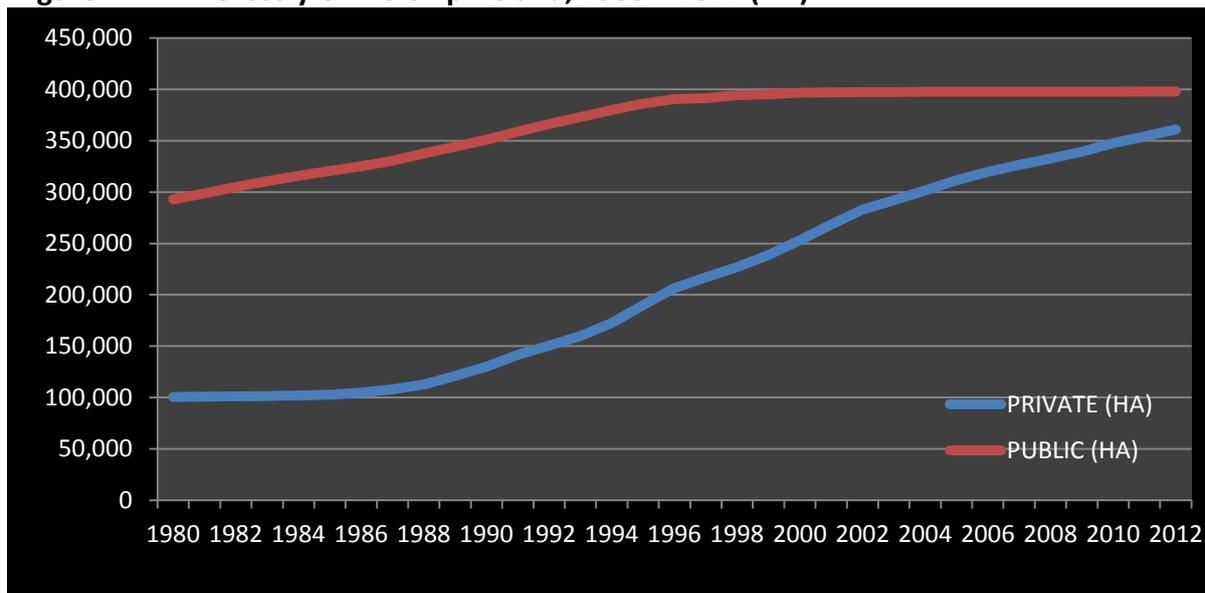
In 2012, the area of forest in Ireland was estimated at 758,761 ha compared to 752,109 ha in 2011. Total land area covered by forestry in 2012 was 11%, of which 47% (or 360,834 ha) were in private ownership and 53% (or 397,927 ha) were in public ownership. These forests are managed by Coillte. Growth in the area covered by forestry is mainly driven by growth in private sector afforestation (See Figure 6 above).

The total area of forestry in Donegal in 2012 is estimated at 59,177 ha or 12.25% of the total land area in 2012. 38% (22,770.67ha) were in private ownership and 62% (36,406 ha) were in public ownership.

#### <sup>13</sup> Benefits of Forestry

- Environmental Benefits: Carbon Sequestration: whereby 4 – 6 tonnes are sequestered per hectare per annum  
59,177 ha = 355,062 tonnes sequestered per annum by Donegal Forests
- Social Benefits: Tourism, Recreation, Landscape, Heritage, Health, Art
- Economic Benefits: Construction – Natural, Renewable, Building Material, Wood Energy - Firewood, Woodchip, Wood Pellets, Employment/ Enterprise

**Figure 7: Forestry Ownership Ireland, 1980 – 2012 (HA)**



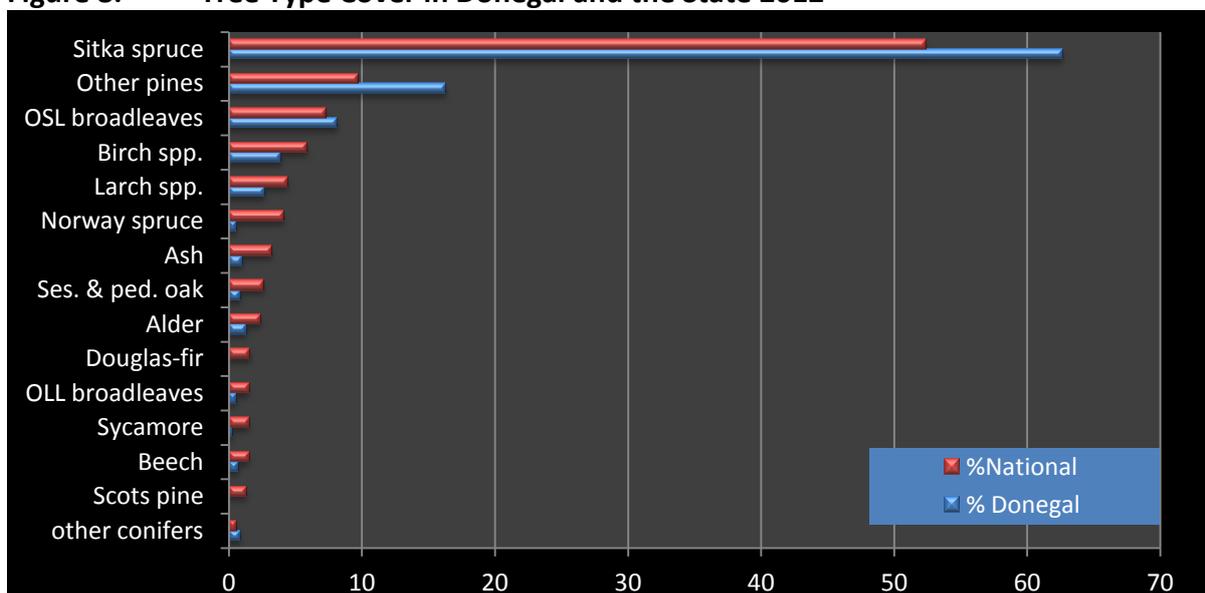
Source: [http://www.teagasc.ie/forestry/advice/index\\_statistics.asp](http://www.teagasc.ie/forestry/advice/index_statistics.asp)

**5.2.2 Species Composition**

In 2012, 83% of stocked forests in County Donegal were coniferous (41,220 ha) and 17% were deciduous (8,230 ha) compared to 74% and 26% in the State. Sitka spruce is the most common type of species in both Donegal and the State @ 334,560ha and 31,100ha respectively.

The largest broadleaf groups in both instances were ‘Other Short Living Broadleaf’ OSL @ 3,980 ha<sup>xvii</sup> in Donegal and 46,220 ha<sup>xviii</sup> in the State. Over half of the OSL in the State is due to willow and this is also reflected strongly in the Donegal instance with significant uptake in willow plantations in recent years. This area offers significant potential economically and environmentally into the future. The next most important broadleaf species in both Donegal and the State are Birch, Ash, Oak and then ‘Other Long Living Broadleaf’. See Figure 8.

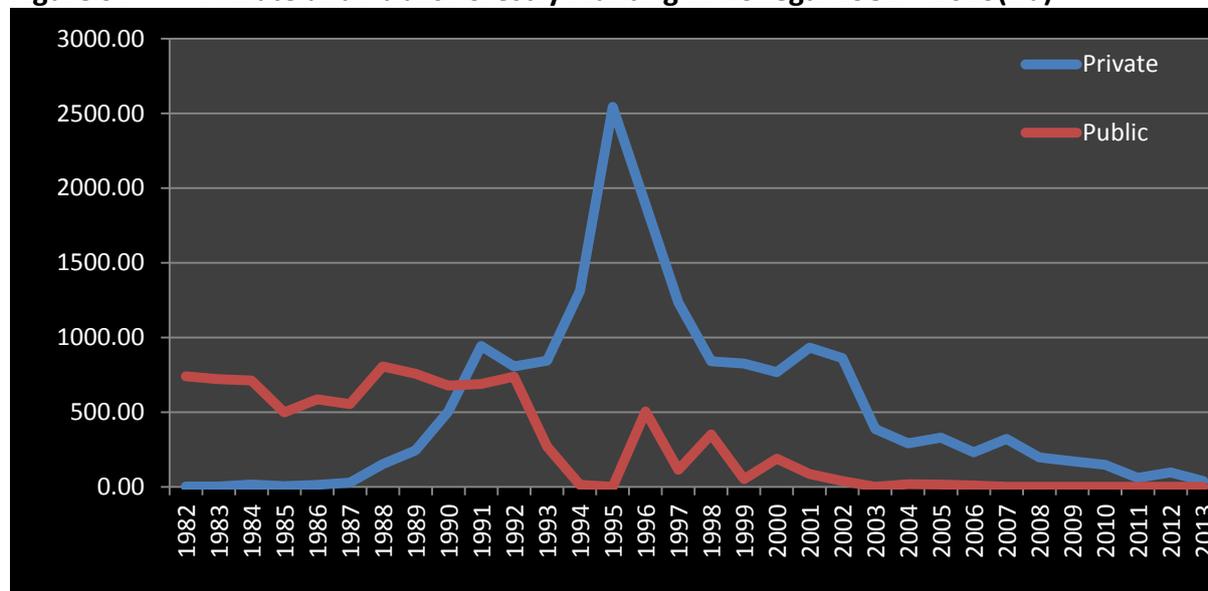
**Figure 8: Tree Type Cover in Donegal and the State 2012**



Source: National Forestry Inventory, 2012 5.2.3 Forestry Planting

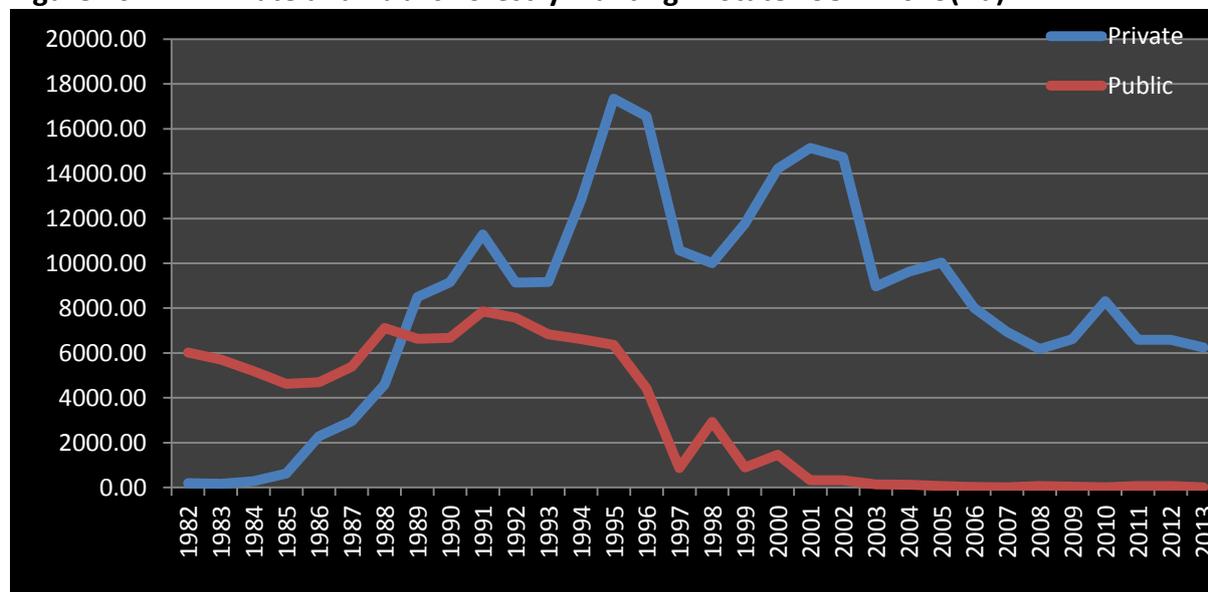
Forestry planting took off in County Donegal in the late 80s and approximately 50% of forests in the County are less than 25 years old. In 2012, there were 6,600 hectares planted by 977 owners in the State of which 96.40 ha were planted by 11 forestry owners in County Donegal. There are approximately 1,000 private forest owners (mostly farmers) in County Donegal. The average forest size in Donegal is less than 10ha. See Figure 9 and 10.

**Figure 9: Private and Public Forestry Planting in Donegal 1982 – 2013(Ha)**



Source: [http://www.teagasc.ie/forestry/advice/index\\_statistics.asp](http://www.teagasc.ie/forestry/advice/index_statistics.asp)

**Figure 10: Private and Public Forestry Planting in State 1982– 2013(Ha)**



Source: [http://www.teagasc.ie/forestry/advice/index\\_statistics.asp](http://www.teagasc.ie/forestry/advice/index_statistics.asp)

## 5.2.4 Forestry Owner Groups

### Donegal Woodland Owners

Donegal Woodlands Owners Society Ltd (DWOSL) is a wood fuel supply co-operative which supports and promotes sustainable forest management and timber marketing. In 2015 DWOSL were active in over 25 different forest sites throughout Donegal; felling, extracting, planting, processing, managing and growing the log and firewood sales business. They are constantly developing new initiative in order to concentrate the core business of helping forest owners to manage their own forests and add value to their timber.

### **Inishowen Forestry Owners**

Membership of this group is open to forest owners and others interested in maximising local forest potential. The group is in its infancy. It is a loose informal setup of neighbours helping each other out with help from Inishowen co-op and the Western Forestry co-op.

### **Environmental Impacts and Benefits**

Environmentally, trees are a necessity in our environment. They have physical, social, psychological benefits. Physically they offer health benefits in terms of carbon sequestration. Socially and psychologically they are an important cultural resource and offer invaluable recreational space to individuals by enhancing everyday health and well being.

Sustainable land use management is of extreme importance. Forestry needs to be carried out in a well planned manner, so as to ensure that it does not have a negative visual impact on the landscape and to ensure that the new plantations are not impacting on the visibility along road frontages.

Potential to offset the CO<sup>2</sup> emissions from other forms of farming through forestry, for example; Carbon Sequestration of 3.4 tonnes per hectare (36,407 +22,771) 59,178 = 201,205 tonnes.

### **Community Forests in Donegal**

Community forests provide a fantastic outdoor recreational facility in Donegal for both young and old. Many have disabled access. Forests offer considerable recreational benefits and can also be an educational area for wildlife enthusiasts. They are an area of interest also for tourists and can provide for an inexpensive outdoor activity for a family.

Ards Forest Park located on the N56 between Cresslough and Dunfanaghy is a key example of such a facility. It is a major tourist attraction and a popular spot for families, school trips etc to visits on a day out.

## **5.3 Seafood Sector**

As an island nation, fishing has always been economically and socially important to Ireland. The clear waters around Ireland's 7,400km coastline have provided exceptionally good seafood for thousands of years. Commercial trawlers can now travel vast distances across the ocean and some are fitted with hydraulically powered winches capable of scooping up several tonnes of fish in a single net. During much of the 20th century overfishing and marine pollution pushed some fish stocks to the brink of extinction. Today, the interests of Irish fishermen, fishing communities and consumers of fish products are supported through the EU's Common Fisheries Policy (CFP). The CFP is negotiated and agreed between all 28 Member States and initiatives that promote sustainable fishing are being encouraged and part funded by the European Fisheries Fund (EFF). The CFP was substantially reformed in 2014 and is now financially supported through a new European Maritime and Fisheries Fund (EMFF).

Ireland's seafood sector is worth some €700 million to the economy, and employs around 11,000 people mainly in coastal counties from Donegal to Louth. The four main industry activities are; Fishing, Aquaculture, Processing and Marketing.<sup>14</sup>

*“62% of fish landed in Irish ports in 2013 was through the ports of Killybegs and Greencastle and this contributed to a total of €113m to the local economy”.*

<sup>14</sup> Bord Iascaigh Mhara, Irish Sea Fisheries Board

There are a number of other smaller and important ports in the County, however, their value is not as easy to calculate.

### 5.3.1 Fishing Ports

The top fishing ports in Ireland are Killybegs, Castletownbere, Dingle, Ros A Mhil, Dunmore East, Kilmore Quay, Howth, Greencastle and Union Hall. With 2 of these ports located in Donegal, the County has a significant stake in the Irish sea fisheries industry. In 2013 Killybegs rank No 1 in Ireland in terms of tonnage and value of landings in 2013, while Greencastle ranks No 5 in terms of tonnages and 8<sup>th</sup> with regards to value of all Irish Ports. Table X below tracks Donegal's stake in terms of the actual monetary value and live weight of landings into Killybegs and Greencastle. It also examines the proportion of landings and values in the national context, which shows that the two Donegal ports combined have landed on average 60.5% of all seafood landed in the state from 2009-2013. The value of landings in Killybegs and Greencastle have increased significantly since 2010. Landing values have averaged 35% of State landing values in the last 3 years. In 2013, Killybegs and Greencastle landed €105 million, an economically significant proportion to the County.

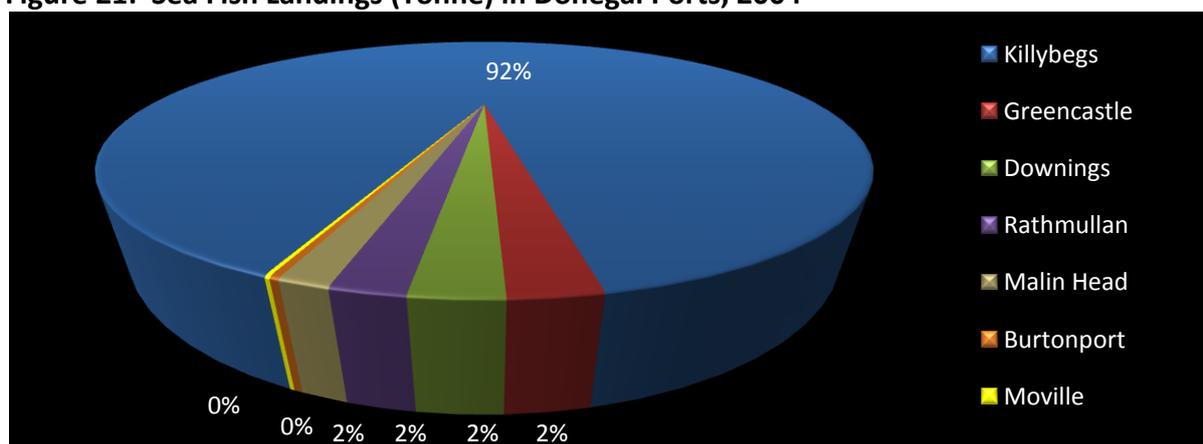
**Table 2: Value and Tonnage of Sea Fish Landings Killybegs and Greencastle 2009-2013**

	Killybegs				Greencastle			
	Value ('000)	% Nat Value	Live Weight	% Nat Landings	Value ('000)	% Nat Value	Live Weight	% Nat Landings
2013	€105,133	34.8	170,14	60.8	€ 8,182	2.7	3,793	1.4
2012	€117,983	35.3	197,65	60	€ 10,430	3.1	7,155	2.2
2011	€104,312	35.3	100,62	50.6	€ 6,355	2.2	3,337	1.7
2010	€ 61,874	29.8	163,44	66.5	€ 7,479	3.6	4,039	1.6
2009	€ 55,273	27	144,15	64.8	€ 5,080	2.5	2,745	1.2

Source: Sea Fish Protection Authority, 2015<sup>xix</sup>

Fishing landings in Donegal ports in 2004 comprised of 113,919 tonnes. This accounted for more than 60% of all landings nationally, demonstrating significance of Donegal and in particular Killybegs which accounted for over 55% of all tonnage landed in the state in 2004. Table 2; illustrates the tonnage landed at Killybegs compared to other ports in the County verifying its significance as the premier strategic fishing port not only of Donegal but on the island of Ireland.

**Figure 21: Sea Fish Landings (Tonne) in Donegal Ports, 2004**



### 5.3.2 Fish farming

Aquaculture activity includes growing fin fish such as salmon and trout and shellfish farming, including the cultivation of mussels, oysters and scallops. County Donegal has also developed a successful aquaculture industry both in the fin fish and shellfish areas with numerous farms around the coast. The impact of aquaculture on our environment is an important consideration, however so too is the impact of other industries and activities on aquaculture. Therefore shellfish waters are subject to ongoing monitoring by the Environmental Protection Agency. **Table 3**; below sets out the aquaculture production areas in the County Donegal, the species involved and their draft monitoring classifications for 2014/2015.

**Table 3: Aquaculture Production Areas 2014-2015**

Production Area	Boundaries	Bed Name	Species	Class
Lough Foyle	Magilligan Head to Inishowen Head	All Beds	Mussels	B
			Oysters	B
Trabreaga	Malin Head to Dunaff Head	All Beds	Oysters	B
Lough Swilly	Fanad Head to Dunaff Head	All Beds	Mussels	B
			Oysters	B
Mulroy Bay	Melmore Head to Ballyhoorisky Point	All Beds	Mussels	A*
			Oysters	B
Sheephaven	Rinnfaghla Point to Horn Head	All Beds	Mussels	B
Gweedore	Carrick Point to Carrickacuskeame and Torglass Island to Dunmore Point	All Beds	Oysters	B
Dungloe	Wyon Point to Burtonport Pier	Dungloe	Oysters	B
		Tearman	Oysters	A
		Inner	Oysters	C
Traweenagh	Dooley Point to Crohy Point	All Beds	Oysters	A
Gweebarra	Gweebarra Point to Cashelgolán Point	All Beds	Oysters	A
Loughras Beg	Loughras Point to Gull Island	All Beds	Oysters	B
McSwynes Bay (Bruckless)	Carntullagh Head to Pound Point	Bruckless	Mussels	A*
Inver Bay	St. John's Point to Doorin Point	All Beds	Mussels	B
Donegal Harbour	Doorin Point to Rossnowlagh Point.	All Beds	Oysters	B
			Mussels	B

### 5.3.3 Sea Fish Processing

Seafood companies produce high value products from salmon, whitefish, shellfish and pelagic fish species (e.g.. herring, mackerel and horse mackerel) all of which generate substantial export earnings to the sector. BIM have identified the following sea food producers and processors in County Donegal. See Table 4.

Table 4: Seafood Companies Products

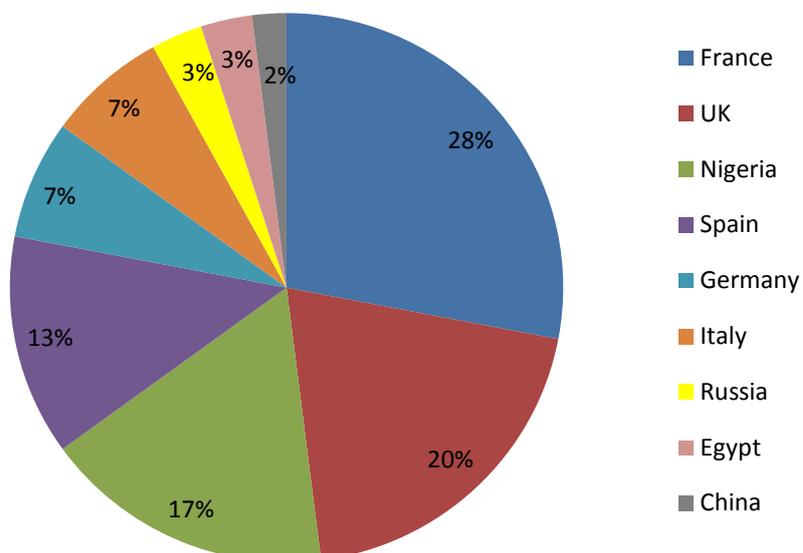
Name	Location	Finfish	White fish	Pelagic	Shellfish	Smoked
Hannigan Fish Trading	Annagry				?	
Sliogeisc na Rossan (T/A Irish Premium Oysters)	Lettermacaward				?	
Atlantic Fish Ireland Ltd.	Bunbeg				?	
Burtonport Fishermans Co-op	Burtonport				?	
Byrne Seafoods	Carndonagh	?	?			
Atlanfish Ltd.	Carndonagh				?	
Starcrest Seafoods Ltd.	Donegal Town	?	?			
Irish Fish Cannery	Dungloe			?		
Premier Fish Products	Dungloe			?		
Marine Harvest Ireland	Fanad	?				
Greencastle Fish Shop	Greencastle	?	?			
Eany Fish Products Ltd.	Inver	?				
Arctic Fish Processing Ltd.	Killybegs			?		
Donegal Fish Ltd.	Killybegs			?		
Fish Sales Killybegs Ltd.	Killybegs	?		?		
Gallagher Bros. (Fish Merchants) Ltd.	Killybegs			?		
Island Seafoods Ltd.	Killybegs			?		?
Killybegs Seafoods Ltd.	Killybegs			?		
Norfish Ltd.	Killybegs			?		
Sean Ward (Fish Exports) Ltd.	Killybegs			?		
Albatross Seafoods Ltd	Killybegs	?	?			?
Fish Sales Killybegs Ltd.	Killybegs		?			
Murrin Fisheries Ltd.	Killybegs	?	?			
Errigal Fish Co. Ltd.	Meenaneary				?	
Foyle Fishermen's Co-op Society	Moville	?	?			

Source: BIM, 2015

### 5.3.4 Marketing

In Ireland the domestic seafood market was worth €326 million in 2013. Despite a decline in 2013, exports of Irish seafood have increased by 29% since 2010 from €378 million to €489 million.

Irish Seafood Exports 2012



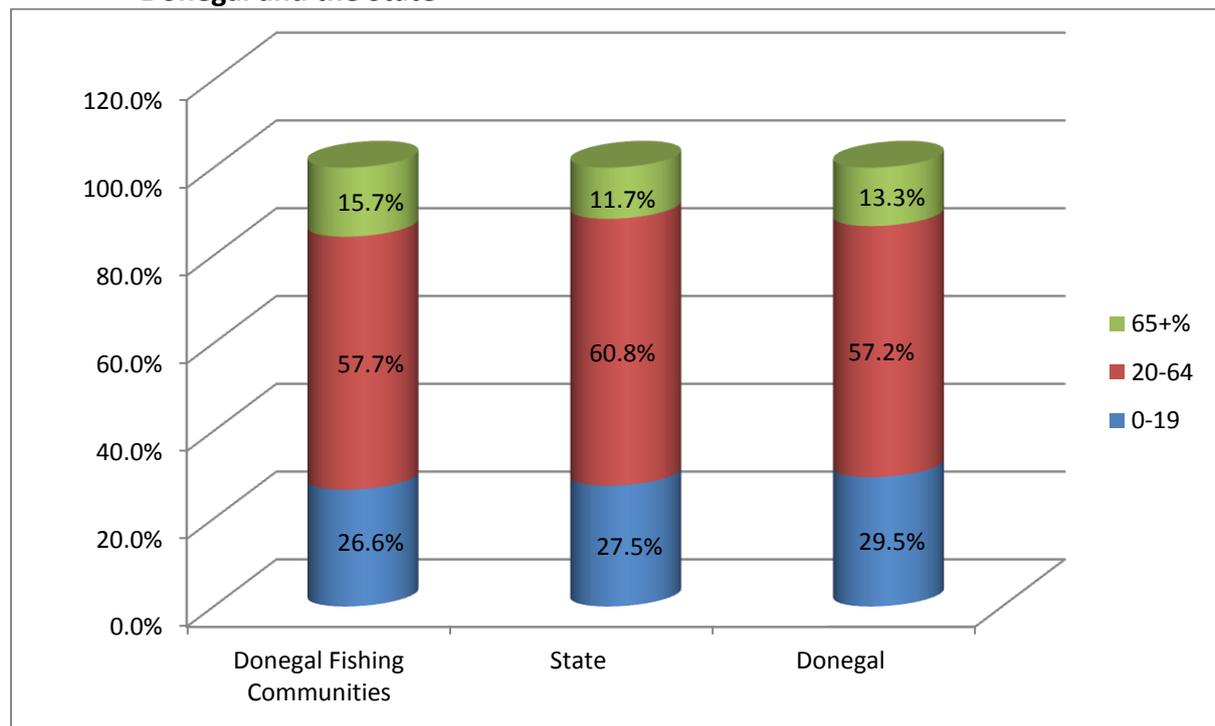
An estimated 65% of Irish seafood exports are sold in EU markets, with France being the main market followed by the UK and Spain. Ireland exported seafood worth €38 million to Asian markets in 2013, an increase of over 40% on 2012. Exports to China alone were worth €12 million. Nigeria is Ireland's top export market outside the EU with exports amounting to €40 million in 2013. Ireland aims to increase total seafood sales to €1 billion and create an additional 1,200 jobs by 2017 under the Government's Food Harvest 2020 strategy. In 2010 an estimated 1.3 million tonnes of fish were taken by the fishing fleets of EU member states from the waters around Ireland<sup>15</sup>. Ireland landed 259,500 tonnes of these fish or 23% of the international landings. Ireland harvests over 40 different types of high quality commercial seafood including salmon, whitefish, pelagic and shellfish species. Irish mussel harvesters were among the first in Europe to achieve organic certification and today supply retailers and premium caterers in many French and German cities, including Michelin-starred restaurants in Paris.<sup>16</sup>

### 5.3.5 Donegal Fishing Communities – A Profile

#### Theme 1 – Population by Age Cohorts

Donegal has an ever aging fishing community. Figure 12; below shows that Donegal fishing communities have a higher population in the 0-19 age bracket and the 65plus age bracket than that of the State.

**Figure 12: Population by age Cohorts in Donegal Fishing Centres proportionate to Co. Donegal and the State**

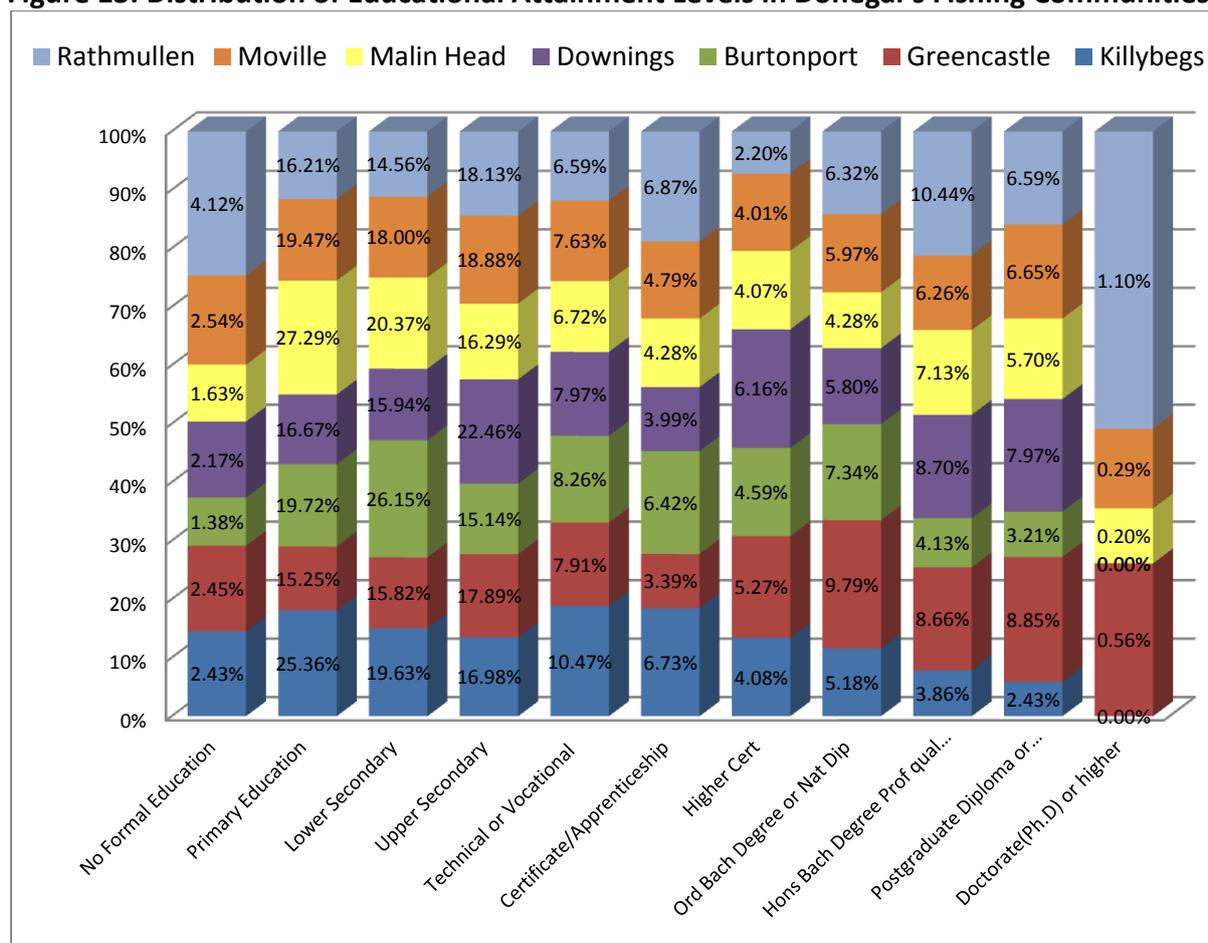


#### Theme 2 Educational Attainment and Early School Leavers

Figure 13 below looks at educational attainment proportionally across Donegal's 7 main fishing centres. Rathmullan is significant higher than the other 6 centres in terms of No Formal Education. School leaving age can be impacted on where accessible and readily available employment exists. This can be particularly relevant where such employment is handed down from generation to generation in the form of agricultural, fishing and forestry operations and other family businesses.

<sup>15</sup> ICES Sub-areas VI & VII

<sup>16</sup> Source European Commission: [http://ec.europa.eu/ireland/key-eu-policy-areas/common-fisheries-policy/index\\_en.htm](http://ec.europa.eu/ireland/key-eu-policy-areas/common-fisheries-policy/index_en.htm)

**Figure 13: Distribution of Educational Attainment Levels in Donegal's Fishing Communities**

### Killybegs

The geography of Killybegs adjacent to major fishing grounds, its location in one of Europe's most outstanding natural harbours, an ancient maritime heritage and year round temperate climate have resulted in its establishment as the most important fishing port in Ireland and is key to the economic future of this region of Donegal. In 2013, more than 170,000 tonnes of fish was landed into Killybegs with a value in excess of €105,133,000. Of this more than 100,000 tonnes are attributable to Irish registered vessels, which accounts for 45% of total fish landings by Irish vessels in Irish ports. This fishing activity is mostly centred on the pelagic sub-sector; out of the total Irish fleet of 23 Refrigerated Sea Water (RSW) vessels in Ireland, 19 are based in Killybegs. In addition to this large pelagic fleet, there is a small but modern whitefish sub-sector and a dedicated shellfish sub-sector. These fleet activities bring with them substantial ancillary industries which has positive spin-offs for offshore oil and gas industries.

In contrast to many other declining fishing communities, Killybegs is vibrant, prosperous and thriving; despite the pelagic sub-sector coming under some financial pressure, it continues to generate very significant levels of economic activity. What little diversification there is remains strongly maritime-based. Manufacturing, such as the traditional carpet-making, has all but ceased. Oil and gas exploration service and support industries have emerged in recent years. The management and support of visiting vessels has become increasingly economically significant.

In 2009 the total turnover in the area was around €250 million with 82% being attributed to the fisheries sector. Offshore oil and gas support activities are in the region of 2-3%. Tourism also accounts for 3% of turnover and, for an economic activity which plays a subsidiary role,

is quite well catered for with several good hotels, guesthouses, restaurants and leisure facilities. The development of the port has also had an unusual spin-off in the shape of increasingly frequent visits from cruise ships which is expected to grow in coming years.

The new pier at Killybegs remains underutilised and must be promoted and developed to ensure the maximisation of this superb infrastructure. Value-adding is a basic requirement for any food-producing industry. The local catering college, a satellite institution of Letterkenny Institute of Technology, is the logical focus for a product innovation centre. To supplement the work of such a centre, the industry envisages EFF support for transnational/multi-state initiatives, fast-tracking marketing and pricing issues. Where industry has already acted to implement sustainable fishing practices, such as attaining MSC certification for a fishery, its efforts must be upheld and protected at international level.

Killybegs is in a pivotal position to diversify and utilise the extraordinary natural resources which are within reach. Based on its excellent geographical location and already established fishing, processing and ancillary industries, it is ideally placed to create and maintain sustainable jobs in value-added seafood, enhanced ancillary services, offshore support services, tourism and marine leisure and green/renewable energy industries

An important challenge for the people of Killybegs is to transfer that entrepreneurial spirit, which sustained the fishing industry so successfully, to other economic sectors ripe for exploitation such as tourism, cruising, off shore technologies.

This area of Killybegs has all the right ingredients to become a world leader in marine based technology, offshore exploration and engineering activity, research and development in the area of multi use of marine by-products, proteins, lipids for oils, as well as functions associated with emergency services and innovation.

### **Greencastle**

Greencastle is Donegal's second port after Killybegs and continues to punch above its weight in the national context. In 2013 Greencastle landed 3,793 tonnes of fish with a value in excess of €8,100,000. This is of great significance locally not only from a monetary perspective but also from the point of view of the expertise and infrastructure that comes with this scale of a port.

The potential for diversification here is enormous, particularly with the recent uptake of whale and dolphin watching that is taking place in this area in addition to the growing interest in accessing the significant underwater archaeology in this area.

### **5.3.6 Research, Development & Training in the Marine Sector**

The offshore training college in Falcarragh, **Effective Offshore**, is Ireland's most significant training location. It specialises in offshore training and skills necessary for exploration and development in oil, gas and renewable industries including health and safety, rope access, accident and emergency procedures. This centre of excellence is a key partner to Killybegs as the focus on marine diversification grows into the areas of offshore resources including tidal and wind energy prospects, underwater exploration, etc. The combination of human capital, strategic infrastructure and natural coastline gives Donegal strong comparative advantage putting the coastal communities in pole position to become world leaders in offshore exploration and marine based research and development. Effective Offshore have partnered with Údarás na Gaeltachta and SOLAS as a means of channelling the economic potential of such developments towards those many of whom have a range of marine

experience from the fishing industry and now seek to broaden their skills and increase their employment opportunities.

**Letterkenny Institute of Technology (LYIT)** offers many courses, one of which is a National Apprenticeship Programme in Professional Cookery at the Killybegs Campus, Tourism College. Courses like this have been developed by Fáilte Ireland, IBEC, Irish Hotels Federation, The Restaurant Association of Ireland, SIPTU, LYIT and certifications representatives. Courses in the whole area of tourism and hospitality are offered from Certificate to Masters level.

#### **5.4 Area Needs Analysis: Developing the Primary Sectors in Donegal**

Donegal's primary sectors are at the heart of rural Donegal, however it has the potential to be the forefront of many of the County's key growth sectors. Agricultural, fishing and forestry have a significant role to play in driving our food and scientific industries. Additionally the skill set and experience of those involved in the primary sectors as well as the lands, waters and buildings used for these activities present significant opportunities for rural communities to harness the growing tourism, recreational and off-shore sectors. With an aging farming population there is an ever increasing need to reinvigorate the younger farming population so as to maximise incomes and increase the future sustainability and viability of primary sector activities in rural Donegal through encouraging:

- dialogue on opportunities presented to all parties as a result of early farm transfer, leasing or partnership
- new methods and ideas to sustain traditional farming by adding value to produce
- increasing promotional aspect of primary sector activities
- each producer in the County to undertake a genuine examination of their holding and to identify realistic opportunities for diversification

##### **Key Areas for Development**

**Food:** Facilitate, development and market entry for food producer groups, including for example the development of a number of food academy's in the County to link producer networks with end users, to drive growth in food tourism by providing such a centre of excellence.

**Lamb:** Significant potential exists for producers in the County to add value in the area of lamb production, which has a growing global reputation. Development of the *Donegal Hills* Lamb Brand- Teagasc has identified the potential for the Mountain/Hill flock to produce higher value added cross-bred stock to meet expansion requirement of the lowland sheep enterprises.

**Potatoes/Seed:** A high level of expertise has developed in the county over the last number of years, in terms of growing seed potatoes. This presents an opportunity to develop this specialist area further is important to ensure this knowledge and expertise is maximised. Marketing initiatives to highlight the health benefits of potatoes would also assist in this area.

**Shows, Festivals & Markets:** Agricultural shows have gained momentum in Donegal in recent years. There are a number of annual agricultural shows that take place around the County such as Ardara, Clonmany, Carndonagh, Killygordan, Glencolumbkille. There is considerable potential for marketing to take place at such events. Within this there is scope

for; hosting national level agricultural events such as the National Sheep Shearing Championships, etc. This would require cooperation between key stakeholders and farming bodies. Farmers markets offer great potential for rural producers to get their products established as well as the arts and crafts industry. However, there is a requirement for standard codes of practise to be developed around the operation of these markets, with a clear leadership role established for the focus to be more based on local Donegal produce.

**Honey:** There is a huge demand for honey and there are a number of support networks for bee keepers in South Donegal. The Teagasc Options Courses brings such networks together to share learning, examine ideas and determine what worked and what did not work through, however there is a gap post in these courses in translating these ideas into practise or business ventures

**Organic Farming:** This is a significant growth are with potential, however production needs to be scaled up so that substantial critical mass exists to increase its viability.

**Equines:** The equine industry remains in a state of recovery following a significant collapse in 2008. According to the Irish Horse Board demands for performance horses and ponies continues to rise, this includes high level performance including eventing as well as low level performance such as riding horses and ponies. By increasing the performance ability of stock, sales will increase and demand will continue to rise to sustainable levels. Projects and initiatives such as equine training or breaking programmes would further increase these levels particularly for young stock. It is important that any projects or initiatives in the equestrian area do not serve to exacerbate the existing problems by for example; encouraging a return to high levels of breeding low quality stock.

**Primary Sector Waste:** A key area for the circular economy is the potential for reuse of the many bi-products from the agricultural, forestry and fishing sectors. Research is required to explore the most effective options in extracting and developing useful new products from such waste products the various in which the extraction of useful materials from food waste. This may also involve identification of where volumes of waste are occurring, identifying new uses for such products.

**Medicinal Properties:** Another area with significant potential. Such products are emerging such as parts of many seaweed varieties, etc. Again this area requires further research to be carried out.

**Seaweed:** Seaweed production in a growing industry in Donegal's coastal communities. AlfAran Kilcar, is becoming a key health product in cosmetics and in food, it is also an great fertiliser used in golf greens (K Club), sporting pitches, horticulture, etc The many known and unknown uses for the wide range of seaweed forms has enormous potential as an important growth area. Japan consumes 90% of all seaweed consumed globally, giving Ireland and indeed Donegal producers a massive market for export.

**Salmon Fishing:** According to the Irish Salmon Growers' Association, salmon farming offers considerable scope for sustainable jobs in Donegal's coastal communities. With increasingly high global demands, an opportunity exists to meet this, however efficiencies in supply and production are required to ensure a year round quality and sustainable exports. A key focus must be based around ensuring the sustainability of salmon farming practice, to prevent any associated pollution of our transitional and inshore habitats. This requires aquaculture

policymakers to build specific links with the industry and the subsequent introduction of enablers in this area.

**Off Shore Training & Development:** Growing area of expertise in Donegal, where skills from fishing industry and renewable sector can be transferred across to such sectors as offshore exploration & emergency training.

**Forestry Owner Groups:** Present huge opportunity for the on-going development of forestry in the County through potential acquisition of harvesting equipment, retain stronger bargaining power together when negotiating with buyers, and are more attractive to buyers as they can access larger volumes via a single contact point.

**Community Forests:** They provide a huge opportunity for rural communities to develop small scale tourism projects.

**Forestry Enterprise Development:** Supports required for feasibility studies, start up costs for a business and equipment costs, small scale harvesting, seed collectors, nurseries requirement to add value.

**Sustainable Forestry:** Timber Certification can be used as another environmental marketing tool to increase the value of forestry produce. Initiatives are required to establish the outlay required to attain such certification across the County's many producers.

**Training Opportunities:** There are many training requirements that would increase efficiencies and outputs in this area such as chainsaw skills; Measurement; Business Supports and equipment; Marketing; Distribution.

**Biomass:** An area of growth and potential in Donegal. The demand for biomass is easily quantified however difficulties arise in ensuring supply and quality control. Structures needs to be established that will monitor quality and guarantee supply levels.

**Marine Infrastructure:** Our strategic location, our island communities and our fishing industry have all contributed to an extensive network of marine infrastructure around the County comprising some 154 piers, jetties and slipways. This resource provides a great opportunity across a range of rural development sectors such as servicing the islands, marine tourism, ecological tours, fishing development, accessing shipwrecks, water sports etc. Work is required to review this network and develop a marine infrastructure strategy for the County which prioritises island and strategic access, as well as requirements to ensure the development of a high quality network of recreation and leisure infrastructure around the County. Proposals must integrate accessibility requirements for those with mobility impairment. Projects and initiative which support this strategy are therefore encouraged.

**Seafood Marketing:** As the largest fishing County in Ireland Donegal would benefit significantly from effective marketing in this area to raise awareness, demand and expectations of customers within Ireland, from an export perspective and from a food tourism standpoint.

## 5.5 Economic Activity

### Economic Base

The existing economic base is diverse. There are 3,175 business registered for taxation purposes. The main sectors are services (1,075), wholesale & retail trade (456); construction (419); education & health (237); NEC (308) hotels and restaurants (200), gas water & electricity (34), machinery, equipment, furniture and recycling (62) ; transport (87), banks (22), primary agriculture (112) chemicals, rubber plastics and metallic product ( 50), print and publishing (18), metal and metal products (21), food, beverages, tobacco (41), post and telecommunications (10), Textile, wearing apparel, leather ( 13), public administration and defence ( 4) wood, cork, paper (6) Source: FAME 2013)

### Inward Investment

Donegal has experienced an increase in employment in Agency Assisted Foreign Owned Companies. There were 2,765 persons employed in Agency Assisted Foreign Owned Companies, in all sectors, an increase of +36% ( 739 Jobs) over the 2006 – 2013 time period. The corresponding figure for the State was -0.91%.

**Strong Inward Investment Base** - Donegal is home to a number of world renowned world class companies operating a range of sectors from Engineering, Medical Technology, Financial Services, Business Services , Clean Tec. Companies include A&M Belting Company Ltd., Kirchhoff Ireland Ltd., Readymix,; Abbott Ireland Diabetes , Care, Zeus Industrial Products ( Ireland) Ltd, Philips Medisize Ireland Ltd, Pramerica Systems Ireland Ltd., United health Group, Claddagh Resources , SITA PTS, Asset InterTech, GES Ireland; Radox Teoranta; Marine Harvest,

### Indigenous Companies

There were 5,089 persons employed in Agency Assisted Irish Owned Companies, in all sectors in 2013. Irish indigenous companies includes E & I Engineering; Donegal Meat processors; P Mulrine & Sons; Powerbar; Get Fresh (Vending) Ltd; Inishowen Engineering, Forward Emphasis; Frames Direct; Donal McMonagaile & a mhic teo; Robert Smyth & Sons Moll Industries, Mulrines, 3D Issue, Donegal Creameries, Ashley Martin Shopfitters, Nvolve Ltd, Aernav, SendMode and Instinct Software

## Chapter 6 Unlocking Our Cultural Resource

### 6.0 A Unique Cultural and Heritage Offering

The physical geography of the County has resulted in a truly unique natural environment<sup>17</sup>. The interactions of human geography<sup>18</sup> with this environment have shaped a very rich and distinctive identity for Donegal and its people. Historic periods and events such as the Flight of the Earls, The Plantation of Ulster, The Great Famine and the Partition of Ireland have impacted in a particular way in Donegal, on our thinking, our language, our relations, traditions, and our way of life.

These impacts are evident through our ever changing economic, religious, social and political landscape. We share a rich and defining cultural heritage of landscape, folklore and mythology, literature, architecture, museum and archival collections, with a vibrant contemporary culture of visual arts, film, performing arts, creative writing, traditional arts and festivals.

### 6.1 Cultural Infrastructure

The county's cultural infrastructure has developed remarkably over the past 35 years. Signature, publicly owned facilities such as Donegal County Museum, the Central Library, Archives Centre, Fort Dunree, Glebe House and Gallery, the Abbey Arts Centre, An Grianán Theatre and the Regional Cultural Centre, work in-tandem with a highly active network of independent and community developed resource facilities such as the Balor Arts Centre, An Gailearaí, An tSean Bheairic, Dunfanaghy Workhouse, Inishowen Maritime Museum, An Crannóg, Ionad Cois Locha, Aislann Chill Chartha, and others, to deliver a wide range of cultural products and services to the local community and to visitors to the county alike.

Together, there are some 429 facilities, providers and practitioners that contribute to the cultural infrastructure of Donegal. In order to continue to grow our cultural sector and increase opportunities to showcase our cultural offering to residents and visitors it is vitally important to consolidate our existing infrastructure through; increasing activities, increasing audience/visitor numbers through promotion, coordination, etc.

### 6.2 Visual Arts

County Donegal has a long and extensive involvement in contemporary visual arts and crafts. The County boasts a number of leading public galleries, arts and crafts studios and a significant number of individual artists and makers. The County has always been an attractive location for artists and key historic developments include the arrival of leading British painter Derek Hill in the 1950s and the subsequent development of the Tory Painters and OPW operated Glebe House and Gallery Churchill.

The main Arts Council funded contemporary art gallery is the Donegal County Council run Regional Cultural Centre Letterkenny. The Council has also operated a very successful public art programme in recent decades that has resulted in a number of outdoor permanent artworks around the County. Other publicly funded galleries include An Gailearaí Gaoth

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<sup>17</sup> For the purposes of LEADER Natural Heritage is mainly covered under Chapter 4. Rural Environment

<sup>18</sup> socio-economic & political

Dobhair, Artlink Fort Dunree, Inishowen, Cló Ceardlann na gCnoc, Gort a'Choirce while venues like An Grianán Theatre and Donegal County Museum Letterkenny and Abbey Arts Centre Ballyshannon host regular exhibitions. There is also an extensive number of craft initiatives throughout the County including Donegal Craft Village, Local Hands Ballyshannon and the very active Donegal Designer Makers network.

### **6.3 Performing Arts**

Donegal is home to a performing arts sector which enjoys national and international recognition. The county is especially strong in the areas of theatre, music and spectacle.

#### **Theatre**

In terms of theatre, the county is implicitly associated with the plays of Frank McGuinness and the late Brian Friel, whose works have been performed on stages throughout the world. An Grianán Theatre is the county's leading performing arts venue and drama producing house. It presents over 140 performances annually, to audiences in excess of 30,000 people. The theatre enjoyed a strong association with the late Brian Friel and has produced many of his best loved plays, including Translations, Dancing at Lughnasa, Molly Sweeney, The Freedom of the City and Artistocrats.

Other Donegal-based companies producing theatre shows on a professional and semi-professional basis, include the Balor Rep Theatre, Bread and Roses Theatre, Workhouse Theatre and Dark Daughter Productions. Together they provide valuable employment opportunities for a wide range of performing arts professionals - directors, producers, actors, designers, stage crew, technicians, marketing personnel etc.

Many of the county's leading community drama groups, such as Lifford Players Drama Group, Butt Drama Circle, Letterkenny Music and Drama Group, Donegal Drama Circle, and Ballyshannon Drama Society, have a long tradition of producing and touring theatre shows, locally and regionally, some since the early 1950s. In addition, companies such as Aisteoirí Ghaoth Dobhair and Aisteoirí Mhíobhaigh (Na Dúnaibh) are among Ireland's leading Irish language drama groups, with Aisteoirí Ghaoth Dobhair in particular, producing high quality drama as Gaeilge since 1932.

#### **Music**

Arising from the continuing international success of Donegal artists Clannad, Enya, Daniel O'Donnell and Altan, the county enjoys an enviable reputation as a place and a community steeped in music. The commercial success of the county's leading musicians and singers owes much to its rich heritage of traditional instrumental music and Irish language song (see below, Traditional Arts).

The County is home to a considerable community of musicians and singers across all genres – popular, country, oldtime, traditional, classical and jazz - who perform regularly at community events, functions, concerts and festivals, in a variety of commercial, community and publicly-owned settings, for local and visiting audiences.

New original music of an international standard is being created in the county by a core of emerging younger artists including The Henry Girls, In Their Thousands, Eve Bell, Chanele

McGuinness, Slow Place Like Home, Reuben Keeney, Sarah Cullen, Clanns, Rosie Carney, Slow Skies, and more. This highly creative sector is supported by an increased availability of relatively inexpensive audio and film recording technology, alongside a local network of professionally managed, state-of-the-art recording studios such as Attica Audio, Full Tilt, Dry Arch, Valley Music and Stiúidió na Mara. Ready access to social media sites and music and film distribution platforms, such as Facebook, You Tube, Soundcloud, Breaking Tunes, Bandcamp, I Tunes etc. now provides a viable means for Donegal artists to develop audiences for their music, locally, nationally and internationally.

The most significant happening in the development of music in the county in recent times has been the establishment in 2005 by Donegal ETB (Education & Training Board) of the Donegal Music Education Partnership (DMEP). DMEP provides high quality, after school instrumental and vocal tuition to over 850 children and young people throughout the county. It employs 32 tutors who each deliver 30 weeks of classes per annum in classical, traditional, jazz and popular music. DMEP is also home to 15 performing groups including the award-winning Donegal Youth Orchestra, the Donegal Youth Choir and the Donegal Chamber Orchestra.

The establishment of the DMEP has also paved the way for a number of significant developments in classical music in the county, not least the formation of North West Opera in 2009, who to-date, have presented eight professionally produced, full-scale operas at the Balor Arts Centre in Ballybofey and at An Grianán Theatre in Letterkenny. The DMEP also assists the Regional Cultural Centre and the Donegal Chamber Music Society to present a regular series of performances by classical music artists in the county.

### **Spectacle**

Donegal has been to the forefront in the development of Carnival Arts and Spectacle in Ireland for the past 20 years. Inishowen Carnival Group, the county's longest established company, has participated in the prestigious St. Patrick's Day Parade in Dublin every year since 1995 while another Inishowen-based company, LUXe Landscape Theatre, has created and presented their distinctive and imaginative shows throughout Ireland and overseas. The annual Carnival Ballyshannon project has provided a focal point for spectacle and carnival arts in the North West of Ireland since 2001. The project culminates in a large scale carnival, street parade involving up to 400 participants, including founding artistic directors LUXe and Dark Daughter Productions, Fidget Feet Aerial Dance Company and Workhouse Studios, Sligo, as well as, on occasion Streetwise from Belfast and Galway's Réalta.

## **6.4 Traditional Arts**

Donegal is intrinsically associated, at home and abroad, with a vibrant and distinctive tradition of music, song and dance. The international exposure afforded, over the past 30 years and more, to Donegal artists such as Clannad, Enya and Altan, as well as to others with strong Donegal connections – Maighréad, Triona and the late Mícheal ó Dómhnaill, Donal Lunny, Paddy Glackin, Na Casadaigh – has focused much attention on the traditional music and song of the county. This has resulted in an enormous respect for the origins and the bearers of the tradition and an acknowledgement that it must be preserved, practiced and nourished into the future.

It has been by virtue of its traditional song in particular, especially traditional song from the Gaeltacht areas of the county, that Donegal enjoys such an enviable reputation. The store of songs which were held by the likes of Róise ‘na nAmhrán’ Mhic Grianna, Néilí Ní Dhómhnaill, Éamonn Ghráinne Mhic Ruairí, Caitlín Ní Dhómhnaill, Aodh agus John ó Duibheannaigh, Nóra Ní Rodáin, and others, has been the well from which successive generations of Donegal singers, many of whom have become household names, have drawn. Singers such as Mairéad Ní Mhaonaigh, Máire Ní Bhraonain, Lillis Ó Laoire, Connie Ó Ghallchóir, Clann Mhic Ruairí, Doimnic MacGhiolla Bhríde, Gearoidín Breathnach, Máire Ní Choilm, Patricia Nic Ruairí, Aoife Ní Fhearraigh, Claire Nic Ruairí, Noleen Ní Colla and others, continue to explore and reinvent the local repertoire.

Raidió na Gaeltachta and Ealaín na Gaeltachta continue to provide vital support to Irish language traditional song in the county while resource facilities such as An Crannóg in Gaoth Dobhair and An tSean Bhearaic in An Falcarrach have become focal points for the on-going invigoration and promotion of the tradition.

In this respect also, there exists a strong network of branches of Comhaltas Cheoltoirí Éireann throughout the county, promoting all aspects of the music, song and dance tradition, through education programmes and through the provision of performance opportunities by way of céilis, fleadhanna and regular monthly seisiúnacha.

Cairdeas na bhFidiléirí (the Donegal Fiddlers Association) has played a vital role since its inception in the early 1980s, in the support and promotion of the art of fiddle playing in the Donegal tradition. It has done much to acknowledge the importance and maintain the profiles of tradition’s founding players - John and Mickey Doherty, Neilly Boyle, Con Cassidy, James Byrne, Francie Mooney and others – and many of the current leading players\* are active contributors to and participants in its events, recordings, publications, research projects, masterclasses and summer schools.

An exciting feature of the contemporary traditional music scene in the county is the emergence of a number ensembles of tremendously talented younger musicians, associated with traditional music teaching initiatives such as An Crann Óg (Gaoth Dobhair), Coirm (Ceol na Coille), Inishowen Traditional Music Project and CCE Chloich Cheann Fhaola.

\* Jimmy and Vincent Campbell, Dinny McLaughlin, Danny Meehan, Tommy Peoples, along with Maighréad Ní Mhaonaigh, Liz Doherty, Martin McGinley, Ciaran Tourish, Dermot McLaughlin, Brid Harper, Ciaran Ó Maonaigh, Aidan O’Donnell, Theresa Kavanagh, Roisin McGrory, Dermot Byrne, Tara Connaghan, Paula Hutton and more. Other noted traditional musicians, not necessarily associated with the Donegal fiddle playing style, would include Seamus McGuire, Dermot Byrne, John Lee, Martin Tourish, Paul Harrigan and Manus Lunny.

## **6.5 Our Diaspora**

The Donegal Diaspora project acts as a platform to raise awareness and appreciation of the County. The project aim is to promote Donegal, encouraging inward investment to the County. Key areas of focus are; culture, heritage, tourism, business, education and enterprise. Great potential exists to utilise countywide resources, creating a step-change in cultural, economic, business and tourism regeneration across County Donegal.

It is recognised that this broad community, the Donegal Diaspora, is a key resource for the region, with the potential to create linkages that provide skill, experience, networks and resources.

We have approx 57,000 people engaging with us from 132 countries.

Top 5 below

1.	Ireland	34,148	47.73%
2.	United Kingdom	15,837	22.14%
3.	United States	11,957	16.71%
4.	Australia	1,575	2.20%
5.	Canada	1,503	2.10%

## 6.6 Festivals

Festivals are a good measure of a community's vibrancy and self esteem. Celebrations of local heritage, leading historical personalities or elements of contemporary culture, can contribute to and sustain a community's sense of identity and well being. Festivals provide valuable performance and exhibition platforms for artists and crafts people; they attract visitors to an area, are a key element of the county's tourism offering and provide a major stimulus to the local economy.

Donegal is home to a rich variety of annual festivals, themed events and cultural gatherings, that are immensely popular with local people and visitors to the county alike. Among them are a number who enjoy a considerable national and international profile, including Earagail Arts Festival, Patrick MacGill Summer School, Sea Sessions, the Rory Gallagher International Tribute Festival, Scoil Gheimhridh Ghaoth Dobhair (formerly Scoil Gheimhridh Frankie Kennedy), Ballyshannon Folk and Traditional Music Festival and Inishowen International Folksong and Ballad Seminar.

Donegal also participates with great enthusiasm in a range of national celebratory events such as Seachtain na Gaeilge, the Bealtaine Festival for Older People, National Heritage Week and Culture Night. In addition, Donegal has hosted a number of prestigious national and regional festival events such as Fleadh Ceoil na hÉireann, An tOireachtas and Rincí Uladh/The Ulster Irish Dancing Championships. Donegal County Council, through its Cultural Services and its Community and Enterprise Divisions, acts as co-ordinator and facilitator to these national and regional events, and the Council continues to deliver a series of in-house initiated and managed festival events including Wainfest, Donegal Bay and Blue Stacks Festival, Distorted Perspectives and Letterkenny Trad Week. A list of existing festivals and events is available in Table 1, Appendix 6.

An opportunity exists to develop new or existing festivals and events around products and traditions that are indigenous or particularly important in the County. There are many possibilities such as turf, potato and/ or seaweed. The Gaeltacht area also hosts many festivals.

## 6.7 Film

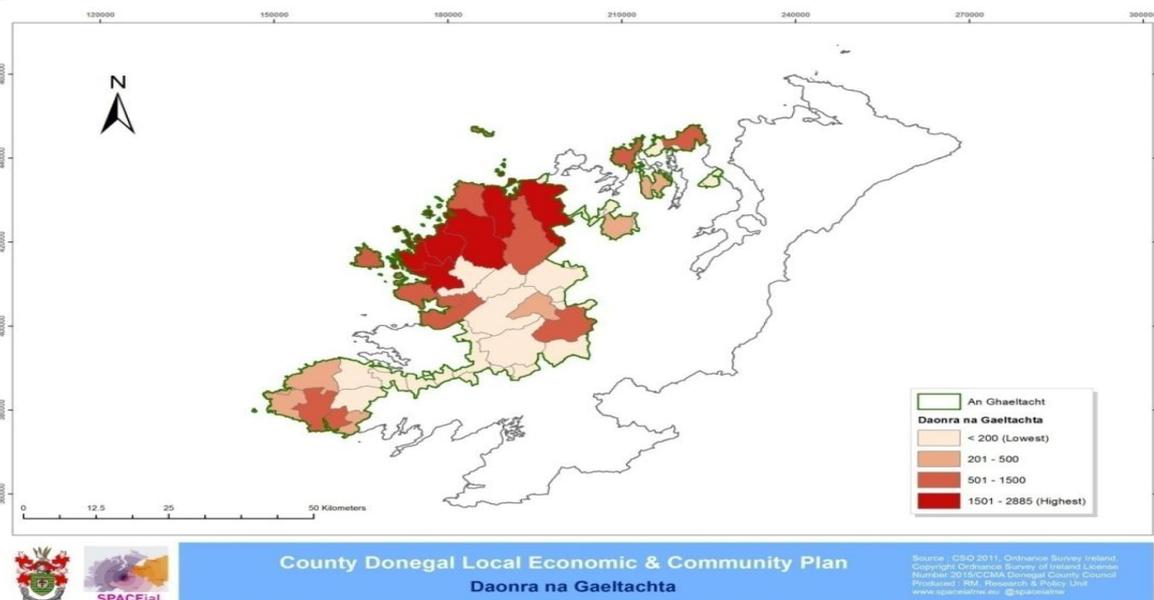
Having played host to a long line of productions and with films such as A Shine of Rainbows, 48 Angels and Grabbers in recent years, Donegal has been firmly established as the perfect choice for film location managers. Ethereal landscapes, clean light, long days, friendly hospitality and quality production resources through the Donegal Film Office are amongst the many features attracting film makers from all over the world. Accommodating productions whether large or small has many direct and indirect benefits to the County. These include the direct creation of employment locally, increased business to local service providers and in many cases the final product acts as a global showcase of Donegal's offer.

It is crucial that the status of Donegal as a top film location is upheld and built upon, through continued promotion of the County as a diverse yet convenient location, continued collaboration between the Donegal Film Office and industry, raising awareness locally of the positive impacts and outcomes from producing films in the County.

## 6.8 Language

Successive governments have promoted the preservation of the Gaeltacht as an Irish speaking community since the foundation of the State. The Gaeltacht presents an opportunity to naturally maintain the continuity of the Irish language tradition but also provides the ideal environment for people who wish to become fluent in Irish. The population of the Donegal Gaeltacht is 24,744 persons and having grown by 4% between 2006 - 2011. Out of all Gaeltacht areas, 33% reside in Co. Galway; 25% in Co. Donegal; 15% in Galway City; 11% in Mayo; 9% in Kerry; 4% in Cork and 2 % respectively in both Waterford and Meath. (See Table 2 Appendix 6 and Figure 1 below)

**Figure 1: Daonra na Gaeltachta**



There are 17,132 Irish Speakers aged 3 years and over in the Donegal Gaeltacht comprising of 69% of the total Gaeltacht population<sup>19</sup>. Frequency of use is a good indicator of a person's ability to speak a language. Census 2011 illustrates that 32% of all Irish Speakers aged 3 years and over 'speak *Irish daily outside of the education system*' in Gaeltacht Areas in County Donegal while the highest was in Galway County Gaeltacht Areas @ 33%. However this is above the average for the State @ 27%.

Under the language Act 2012, the Donegal Gaeltacht is divided into 8 distinctive linguistic regions, each of which must develop a language plan over the next 2 years and implement within the 7 years via a wide range of activities. The individual plans must support the development of the language and Gaeltacht area taking into account the differing linguistic characteristics of each area.

### **6.8.1 The Age Composition of Irish Speakers**

Table 3 Appendix 6; breaks down the 17,132 persons aged 3 years and over in Donegal Gaeltachta Areas who are Irish Speakers into different age categories. This table reveals that Donegal has a marginally higher percentage of children who are Irish Speakers aged 3 - 4 years and 5 - 9 aged categories than in the State. For each four year age category from 10 to 59 years, Donegal has a lower percentage of Irish Speakers than in the State. For each four year age category over 60 years, Donegal has a higher percentage of Irish Speakers than in the State. These figures are indicating a longer term threat to maintaining Irish Language as a living language within the Gaeltacht. Therefore projects and initiatives are required to highlight the importance of the language within the County so as people from all over the County embrace this unique cultural asset so as assist in its promotion and integration into everyday life right across Donegal.

### **6.8.2 Irish Speaking in Donegal**

There were 58,998 persons in County Donegal (40%) who regarded themselves as '*Irish*' speakers in 2011, while 92,471 selected into the '*Non Irish*' speakers category. Table 4 Appendix 6, breaks down the population aged 3 years and over into Irish and Non Irish speakers. This table reveals in 2011 that the ranking for Galway was @ no 1; Kerry @ No 4; Mayo @ No 5; Cork @ No 6<sup>th</sup> and Waterford @ No 9<sup>th</sup> remained unchanged over the period 2006 and 2011. The ranking for Donegal disimproved from 20<sup>th</sup> to 22<sup>nd</sup> position, while Meath position improved from 18<sup>th</sup> position in 2006 to 17<sup>th</sup> position in 2011.

### **6.8.3 Gaeltacht Service Towns**

The figures above indicate that there is substantial potential to grow the Irish Language outside of the Gaeltacht and of particular interest here is the creation of Gaeltacht Service Towns, under the Gaeltacht Act 2012, which are defined as those towns situated in or adjacent to Gaeltacht Language Planning Areas and which have a significant role in providing public services, recreational, social and commercial facilities for those areas.

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<sup>19</sup> [1] all countries excluding Ireland [2] 20 'other countries' with 742 people were excluded in this instance due to lack of actual figures by birthplace. Total represent 34250 from 47 countries

Sources: Data - CSO, 2011 Images - <http://travel.nationalgeographic.com/tra>

As a living language, opportunities to integrate the Irish language into all facets of day to day life in Donegal must be constantly targeted. Some of the many areas where integration opportunities exist include, the use of the language in work environments, in delivering services, by incorporating Irish names into shop display, through the type of programmes and films on TG 4, having 'Irish Tents' at music festivals, by creating opportunities for employment in cultural tourism based around the use of the Irish language and by incorporating the 'new Irish' who want to be able to speak the language.

#### 6.8.4 New Languages

Despite the dramatic drop in immigration experienced since 2007 with the effects of the economic recession, encouragingly inward flows have recovered slightly since 2010. According to the 2011 Census, it was determined that 34,992 people who were resident in County Donegal on census night, defined their birthplace as being outside Ireland, representing an actual increase of 7784 since 2006. Relative to the State at 17%, the proportion of County Donegal's resident population as a percentage of total population originating from outside the country by birthplace was greater at 22%. The 34,992 persons who were born outside of Ireland but resided in Donegal came from 47 different countries bringing a wide range of new languages to the County.

22% of the County's population were born outside of Ireland making Donegal a culturally diverse County and part of a much wider global community. This provides a wide range of opportunities in terms of enhancing the language skills of the labour force etc but also provides challenges in terms of integration into the economic, social and cultural fabric of the County and in delivering services.

### 6.9 The Creative Sector

The Creative Edge Project identified 429 creative businesses/bodies within the County. The table below shows the wide range of such businesses in the County.

Creative Sector	Businesses
Advertising	3
Architects	76
Art Centres/Theatres/Galleries	45
Artists (incl. animation)	31
Ceramics/Stone Working	17
Creative Entrepreneur	7
Engineering/Industrial Design	12
Film/TV	44
Food / Production	7
Glass/Crystal	6
Graphic /Web Design/ICT	28
Interior Design	8
Jewellery	14
Marketing	8
Metal Working	9
Music	9
Photography	49

Print Press/Services	24
Radio incl. publishing	9
Software Development	21
Textiles incl. Weaving, Basketry, Leather etc	64
Crafts incl. Wood Turning, Toy & Musical Instrument Making	22
Other	13
<b>Total</b>	<b>526</b>

### **6.10 Material Heritage**

Our culture has been shaped by our history. The cultural legacy of this history is represented by both material and non-material heritage (tangible and intangible). Archives and artefacts in particular enable us to explore our past, to learn more about our history and to share this story with current and future generations. Archives are original documents contained in any medium which have historical or evidential value and which must be preserved permanently.

Many of these archives and artefacts are preserved in a variety of museums and archives/heritage centres throughout County Donegal. There are over 250 heritage organisations or community groups with a heritage remit in County Donegal. There are about 40 museums, heritage centres and historic houses open to the public. Local authorities, the local community and voluntary sector all play a vital role in preserving our material heritage. Projects and initiatives which seek to preserve, conserve, promote and make accessible our material heritage including artefacts and archives are to be encouraged.

### **6.11 A Rich Built Heritage**

The cultural legacy of our past is embedded into the rich built fabric found in Donegal's built environment. This is evidenced in the market towns, clachan villages and Victorian terraces from the warehouses, bridges and railway stations, to the churches, mills, forts and piers, from the big houses, vernacular cottages and outbuildings, to stone circles, shipwrecks, milestones and water pumps. The innate qualities found in these are as important to our cultural identity as the spoken and written word.

The importance of our built fabric and its association with our past are at the forefront of not only how we live now, but how we can sustain and regenerate our place for the future. How we retain our historic built fabric and how we sensitively incorporate new development into our environment are key aspects of this. Reusing and reinventing existing structures to make them relevant today is essential to their structural maintenance and ultimately their longevity for the future. An opportunity exists to conserve and promote our built heritage and to reinvigorate our spaces and communities at the same time by reduce instances of vacancy and dereliction through the restoration and reuse of buildings and structures for accommodation purposes, local enterprise, retail and tourism services. Understanding the value of our archaeological network of heritage sites is key to its preservation and enjoyment. Opportunities exist to increase awareness and accessibility of sites.

The Heritage Towns Scheme is based on the principle that a number of towns with a strong physical character have the potential to be representative of the heritage of Ireland. This process has the dual effect of helping to conserve the built environment of these towns and of providing a marketing tool for the tourism industry. Within Donegal, Ardara and Ramelton were designated and marketed under this initiative (Ardara - with a theme of weaving and Ramelton - with a theme of Georgian port or town). Donegal County Council has designated the following towns; Ardara, Ballyshannon, Moville, Ramelton and Raphoe as 'Heritage Towns'.<sup>20</sup>

### 6.11.1 Architecture

How and where we build structures determines how we live now and in the future. Quality building design and layout are directly linked to how easily and safely we can get around, how we use energy, the amenity value of our built environment and ultimately our sense of place. These are all important attributes not only to our own quality of life but also in making our places sustainable and attractive to others.

Donegal has many fine examples of architecturally important structures across a range of periods and styles from Fanad Lighthouse to St. Eunan's College to our Roshine slate cottages, to the internationally iconic St. Aengus Chapel in Burt which was voted 'Building of the Twentieth Century' by the Royal Institute of Architects of Ireland (RIAI). While our Record of Protected Structures in Donegal is amongst the smallest in the Country comprising of 375 structures, our National Inventory of Architectural Heritage<sup>21</sup> is one of the largest. In its current form it contains some 1,669 structures and provides a representative sample of the architectural heritage across Inishowen, Stranorlar, Donegal and Letterkenny Municipal Districts. These important structures range from bridges to lighthouses, walled gardens to post boxes to lime kilns. 12 carry a National rating while 1657 carry a Regional rating.

Buildings are a valuable resource essential for living, working and socialising. There are almost 92,500 buildings in Donegal; 84% of these are used for residential purposes, 7% for non-residential purposes (e.g. shops, community centres, offices) and the remaining 9% are dual purpose properties comprising both residential and non-residential uses. 8,205 of these buildings are either vacant or derelict, many of which are an important part of our built heritage.

Vacancy and dereliction have a negative impact on society for many reasons, including the creation of visual eyesores, economic decline, health and safety dangers, anti-social behaviour and reducing resource and environmental efficiencies by wasting lands and buildings which are scarce resources. Where clustering of vacancy and dereliction occurs these issues can have a devastating effect on the built heritage of whole areas, particularly in our rural towns and villages where historic streetscapes can be lost. As a result the innate character and sense of place of the whole settlement is lost reducing its attractiveness as a place to live, invest, visit and do business in.

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<sup>20</sup> <http://www.askaboutireland.ie/reading-room/history-heritage/heritage-towns/the-heritage-towns-of-don/>

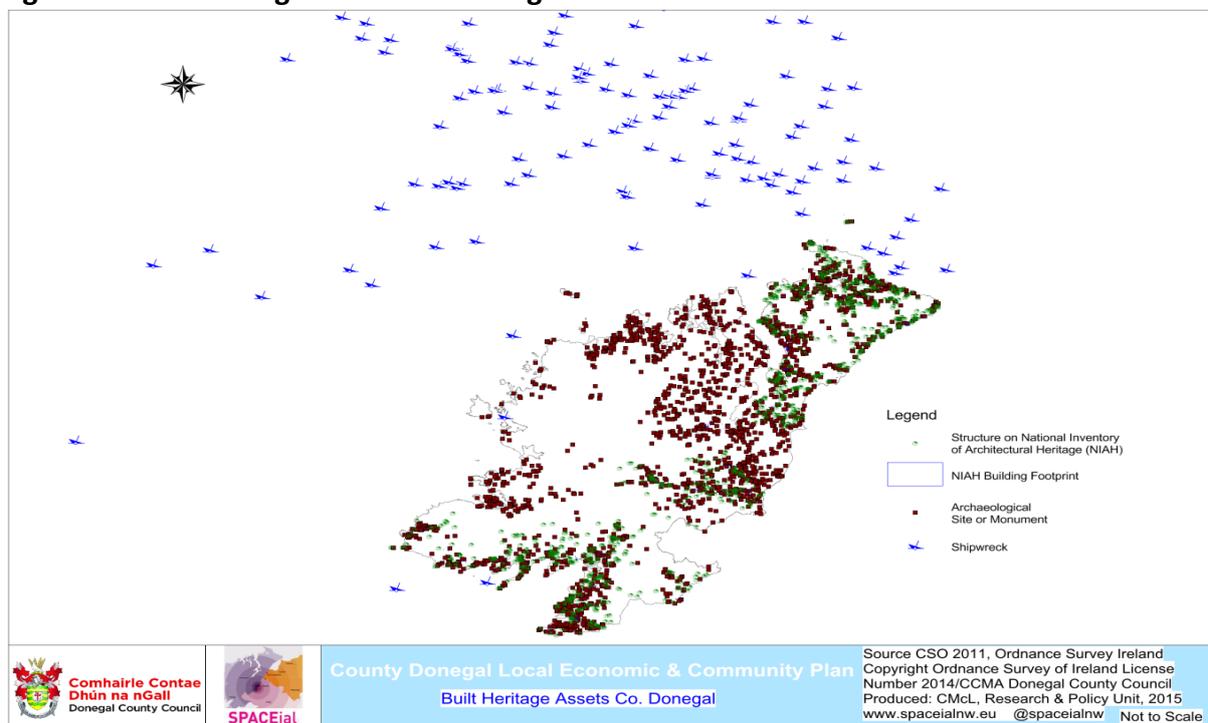
<sup>21</sup> Published by Heritage Council

### 6.11.2 Archaeology and Underwater Archaeology

A direct window to our past is the archaeological evidence that remains visible today. In Donegal the richness of our heritage means that today we have a significant body of objects, structures, features and sites of archaeological importance. According to the Archaeological Survey of Ireland's (ASI) Sites and Monuments Record (SMR) there are 3,129 monuments and sites in Donegal. These range from Crannogs to Bullaun Stones, from Midden sites amongst the oldest remains to be found in Ireland, to the Kilcooney dolmen over 4000 years old and one of the finest examples of a monument of its kind in Europe. As well as land based archaeology, we have a rich maritime heritage including underwater archaeology. There are more German U Boats and ocean liners sunk off the coast of Malin Head than anywhere else in the world the majority of which were casualties of WW1 and WW2. Donegal's extensive coastline together with a number of navigable loughs, and its key strategic position in terms of invading and defending the island, have resulted in a uniquely rich shipwrecks adding to Donegal's maritime heritage. Due to its rich underwater archaeology – shipwrecks, The Infomar Project uses lidar technology to map the seabed. It is detecting more and more wreck sites of the Donegal coast. The current number of wrecks stands at 252.

There exists, significant potential to promote and develop underwater archaeology in the County both in terms of diving and research potential of wreck sites but also as an educational resource around the activities, routes and purposes of such vessels off our coast.

**Figure 2: Built Heritage Assets Co. Donegal**



## 6.12 Area Needs Analysis: Conservation Through Access & Promotion

**Promotion:** Many elements of our cultural heritage are protected under one form of legislation or another. Therefore all projects and initiatives which seek to promote, develop or increase access to our built heritage must recognise the strategic importance of such elements, seek any necessary permissions and where appropriate include measures to protect and conserve such elements of cultural heritage for future generations. Projects and initiatives which seek to develop and promote elements our cultural heritage as an educational resource are also encouraged.

**Economy & Enterprise:** Donegal's rich culture and heritage presents an enormous opportunity for enterprise development and economic growth, while at the same time enhancing the protection and sustainability of our rich heritage. As well as adding to the attractiveness of Donegal for tourists these elements greatly enhance our sense of place and our identity for residents. It provides that highly attractive factor now being sought by both indigenous and international companies considering the County as an investment location in that it can provide a high quality of life for the skilled labour force required by such companies. Therefore the development, conservation and in particular the promotion of our built and natural heritage is a key economic factor for the County.

Projects and initiatives are welcomed which serve to increase awareness locally and regionally of the significance of our culture and heritage in order to maintain and promote it as a vehicle for economic regeneration in our rural communities.

Cultural and built heritage is an area with significant potential from a tourism perspective. Project which seek to promote access and conservation of such elements are welcomed.

## Chapter 7: Capitalising on Our Rural Tourism Advantage

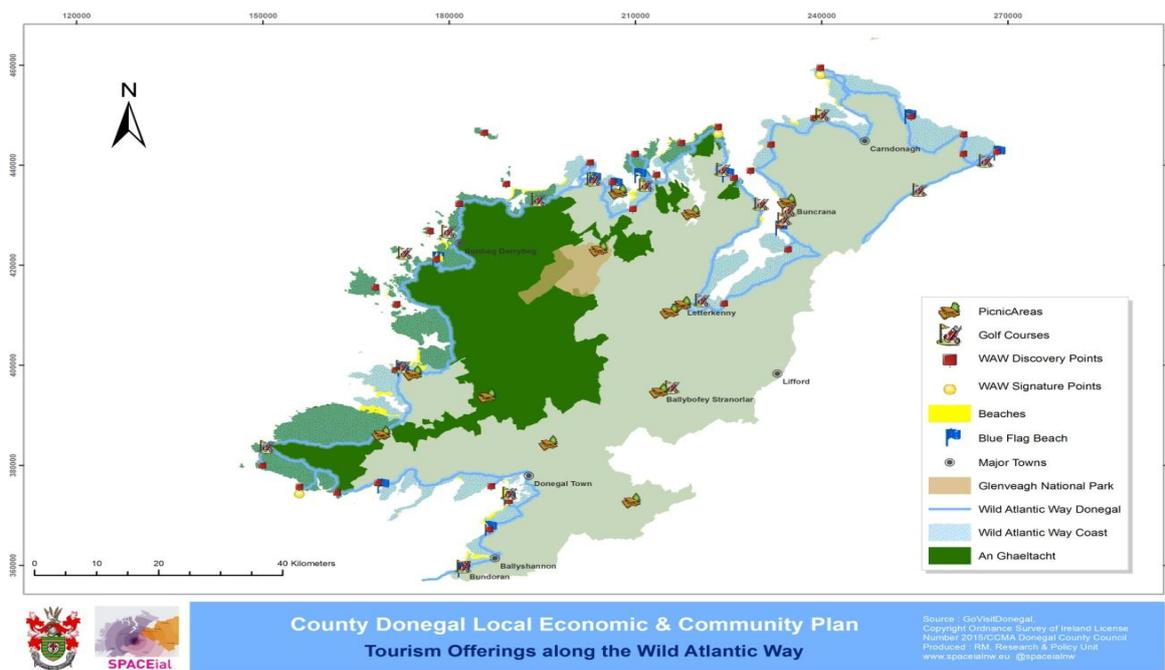
### 7.0 Rising Tourism Numbers

The number of tourists visiting Donegal is consistently on the increase. In 2013, 199,000 overseas visitors came to Donegal, increasing by 14.3% since 2012. Of the visitors in 2013, €78,000 were from Britain, 70,000 from mainland Europe, 37,000 from North America and 14,000 from other locations. Overseas visitors were worth €48m to the local economy. The counties domestic visitors were also up from 245,000 (2012) to 260,000 (2013). The domestic tourism market was worth €64million.

There are a number of factors driving this event including the establishment and promotion of the Wild Atlantic Way, along which there are a number of signature points like Slieve League, Fanad Head & Malin Head and discovery points including; spell binding islands<sup>xx</sup> breathtaking blue flag beaches<sup>xxi</sup>, world class golf courses<sup>xxii</sup>, community forests and picnic areas<sup>xxiii</sup>, and historical landmarks<sup>xxiv</sup> etc (See Figure 1 below)

Investments have been targeted into various tourism products over the years and this is testimony to the quality of the tourism offering. However, targeted initiatives and investments are necessary for rural communities to harness the full potential of all the Wild Atlantic Way brings in terms of diversifying into accommodation provision, developing tourist based enterprises etc To achieve this it is also essential to provided rural communities with the tools necessary to make such diversification viable, be it upgrading farm houses to take in tourist, installation of public amenities like toilets, recycling bins, picnic areas etc; developing small rural enterprise based around the Donegal Brand etc It is also important as tourism levels rise in rural areas that the protection and enhancement of our unique landscape and heritage is at the forefront of all such projects.

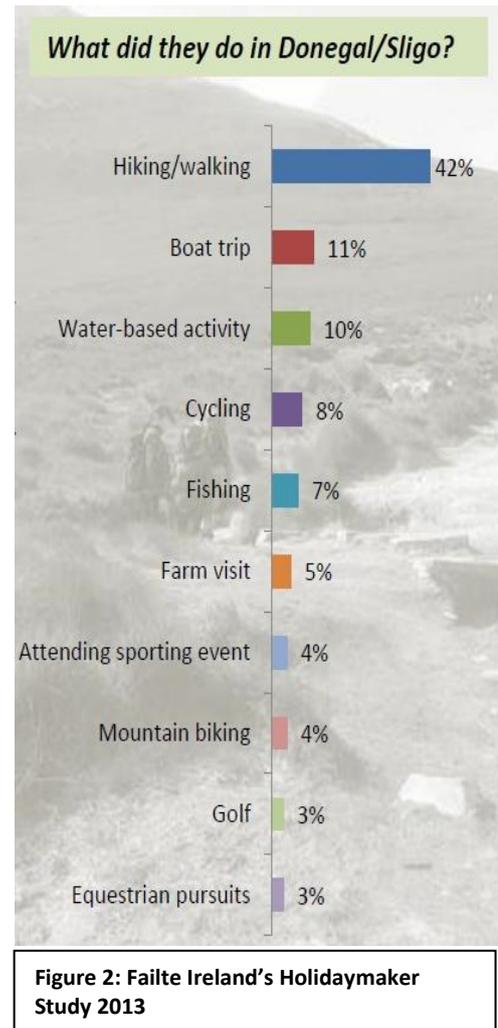
**Figure 1: Tourism Offerings along the Wild Atlantic Way**



## 7.1 Our Rural Tourism Assets

Tourism plays a significant role in Donegal's rural economy. Continued supporting measures for a varied and innovative approach to rural tourism development are crucial in sustaining rural communities into the future. Failte Ireland's *Holidaymaker Study 2013 – Donegal/Sligo* found the most frequently cited reason for recommending Donegal/Sligo was the 'the Beautiful Scenery/Countryside' (80% of respondents). When asked 'What did they do in Donegal/Sligo?' A breakdown of the 10 most popular answers is illustrated on the adjacent table. It must be noted that all of the top 10 answers comprised various ways our natural environment was accessed and experienced by tourists. This significant emphasis on outdoor recreation, totalling 97% of responses, undoubtedly places the sustainable management of our natural heritage at the heart of Donegal's tourism agenda.

The *Go Visit Donegal Brochure*, prepared by the Donegal Tourism Sector Forum in 2015, profiles areas such as; rural recreation and adventure tourism, food tourism, culture and heritage initiatives and these are presented below.



### 7.1.1 Adventure and Activity Tourism

#### Donegal - An Outdoor Adventure Capital

Donegal, with the highest number (13) Blue Flag Beaches in the country @ 13 and provides a wide range of adventure and water sport activities from Kayaking, Kite-surfing or Deep – Sea-Diving to the outdoor enthusiastic. In addition there are a number of surf schools offering quality accommodation, fun surf lessons and competitive boat hire packages. The golfing enthusiastic can play on world champion ship golf courses like Ballyliffen Golf Course, Donegal Golf Course, Narin and Portnoo golf course, Portsalon golf course Rosapenna golf course etc (See Table 1 & 3 Appendix 7)

#### Donegal – An Anglers Paradise

The County boasts clean rivers, famed for the prolific runs of salmon, numerous sea trout and wild game fisheries which entice anglers from many parts of the world. The Atlantic coast offers short angling while deep sea fishing is also available. Donegal offers the angler wild and plentiful fish stocks, fully equipped sea angling licensed charter boats and a wide range of stunning locations all over the County (See Table 2 Appendix 7)

### **Donegal – A Trail Blazing Landscape**

In Donegal, the adventure seeker can explore a wide range of walking trails like Colmcille Trail, Mamore Gap, Bluestack Way, Drumboe Woods, Bloody Forelands, Ards Forest Park; can hike through some of the most dramatic and iconic mountains for example; Errigal, Muckish, Slieve Sneacht, Urris Ridge, Slieve League etc; can cycle along 1000 km of coastal and inland cycle ways or hack by horse or pony using through the 11 different Equestrian Adventure Centres throughout the County (See Table 3 Appendix 7).

The County has state of the art Sporting and recreational facilities for example Letterkenny Regional Sports and Leisure Centre; Finn Valley Athletic Club Stranorlar; Garten Outdoor Education and Training Centre; Waterworld Bundoran to name but a few.

### **Parks and Play Areas**

Table 4 Appendix 7; outlines the range of Parks and Gardens in County Donegal. Glenveagh provides the Tourism Flagship attraction for the County attracting more visitors annually than any other attraction in the County. In addition there are a number of town parks that are distributed across the major settlements in the County. Play Grounds and Mini Pitches, are one of the most evenly distributed facilities across the County with one or more within a 10 km range of each main settlement .

#### **7.1.2 Food Tourism**

Fáilte Ireland, identified in 2009, that €1.2 billion was spent on food and drink by the 9.8m overseas tourists. Applying these figures to the Donegal context for 2013, reveals that the 199,000 overseas visitors spent on average €25 million on food and drink in the County. Given the potential of the sector, it is important to strengthen the current producer base to ensure a large and robust number of producers across the various sectors.

The Donegal Food Strategy has presented a clear vision as to how to achieve this ‘by working collectively to make Donegal famous for food and recognised as a pioneering region for its approach to fostering and growing new start up and existing food businesses’.

- Increase the amount of new food start ups through both artisan and added value start-ups.
- Increase opportunities for restaurants, hotels, retailers to source locally produced ingredients at competitive prices.
- Marketing and promotion of Donegal as a Food Region via the Food Coast Brand.
- Increased co-ordination of food strategy in the County via a Food Coordinator.

Donegal’s unique location and natural environment has resulted in distinctive farming and fishing techniques. This has lead to the production of distinctly Donegal food products, particularly in our most remote, inhospitable and least agriculturally productive areas. The agri food sector is continuing to experience growth as more and more indigenous brands are becoming established and being distributed to a wider consumer base.

Such product proposals provide an opportunity for rural communities to diversify and establish alternative income streams by adding value and providing employment beyond primary agricultural and fishing production.

An opportunity also exists to link such local producers with the growing numbers of tourists visiting the County. The Food Coast – Donegal’s Good Food Initiative has the overall aim of acting as the central platform for establishing Donegal as a “food County” – a place with a vibrant food culture and food economy. The establishment of the Wild Atlantic Way brings with it readily accessible routes to an ever expanding global market for local producers.

However, a co-ordinated approach is required to showcase our product range at events, markets, as part of tours, etc.

Chapter 5 Agriculture, Fishing and Forestry; provides more detail on opportunities to further develop our growing food sectors such as organic lamb from the Donegal hills, Donegal honey, Island pigs, seaweeds, etc.

### 7.1.3 Cultural Tourism

Chapter 6; outlined Donegal's strong cultural sector comprising of a unique sectoral mix of practitioners, facilities and services. There has been continued investment of cultural and arts funding in Letterkenny from local and national sources, including; An Grianan theatre (310k in 2013), Regional Cultural Centre (€135,000 - Arts Council in 2013), Donegal County Museum (grant funding 2011-2013).

Donegal has a rich Built, Natural and Cultural Heritage. These unique features and assets which are explored in depth in Chapter 6 and in Chapter 4, provide a unique tourism product through our natural heritage designations. The Nature designations alone make up almost a quarter of Donegal's landcover (not including offshore waters). 46 Special Areas of Conservation (333 SqKm); 26 Special Protection Areas (306 SqKm); 14 Natural Heritage Areas (21 SqKm); 80 Proposed Natural Heritage Areas (314 SqKm); 7 National Nature Reserve (11 SqKm). The County's archaeological heritage comes in the form of 3,129 Sites and Monuments. In terms of the County's architectural heritage, the National Inventory of Architectural Heritage currently identifies 1,782 buildings in Donegal while there are 375 of these on the County's Record of Protected Structure.



## 7.2 Tourism Infrastructure & Accommodation

Donegal hosts many of the ideal qualities to make it a highly successful County in terms of future tourism development. The rugged coastline, the picturesque landscape, a County rich with heritage and culture, the uniqueness and endearing nature of the people and the development of the Wild Atlantic Way, collectively, offers endless opportunities that need to be fully utilised, but this needs to be done in a constructive and effective manner to lay foundations that are both solid and robust. Foundations that can be built upon to maximise the full economic potential of the County for future generations.

### 7.2.1 Essential Tourism Infrastructure

The wealth of attractions outlined in the previous section are heavily distributed across the length and breadth of the County. In terms of accessing these areas, 74% of tourists travel by private motor car, 15% by private coach, 5% use public transport with the remaining 6%

by other means<sup>22</sup>. Almost always accessed by either car based tourists or coach tours travelling along our scenic routes such as the WAW, Atlantic Drive, Inishowen 100. This road based travel requires a range of essential facilities, including;

### **Public Conveniences**

A number of media reports in recent years have highlighted the lack of public toilet facilities at various locations throughout the County. Such reports have centred around the lack of toilet facilities, maintenance problems as well as their closure in a number of towns in Donegal. Current provision of public conveniences in the County include 15 such facilities currently provided throughout the County, with a further 7 currently closed. To enable a wider provision of such services it will be necessary to review the current offer with a view to reopening facilities which are currently closed or to introduce new facilities where none currently exist. These may be particularly useful in the larger settlements or at key tourism locations across the County.

### **Picnic Areas & Viewing Points**

According to Ordnance Survey Ireland Donegal has numerous picnic areas and viewing points across the County, these are in locations such as; Ards Friary, Ludden Buncrana, Grianan an Aileach, Bundoran, Ballymacool, Ballyshannon, Donegal Town, Letterkenny, Pettigo etc. These offer the meandering tourist opportunities to stop off and enjoy Donegal's natural environment and also present ideal locations for casual trading ventures for the rural community. Increasing tourism related facilities at the locations present an opportunity to further develop tourism in these areas. Such facilities could display information on local attractions, events and services, waste and recycling facilities etc. It is important that these sites comprise necessary facilities .

### **Motor-home Facilities**

Recent research conducted by students at LYIT has highlighted the distinct lack of the specific services required by motor-home tourists in the County. An excellent example of such a facility opened in Buncrana in 2013, however there is a need for such provision at multiple locations countywide. This service gap provides an opportunity for the rural community to provide motor-home service points as a standalone income supplement or in conjunction with their existing business such as pub, shop, B & B's, activity centre, etc.

### **Environmental Impact - Litter & Recycling**

An increase in tourist numbers can have a damaging impact on our environment. This can occur in many ways such as where excessive numbers of visitors or inappropriate vehicles erode fragile surfaces, or where littering is taking place. These can all have a damaging effect on our natural environment, which is in many cases the initial point of attraction for many tourists to the County in the first place. It is essential that measures and programmes are put in place and enforced to ensure that such activities are controlled and such impacts are eliminated. Existing levels of litter and recycling facilities need to be re-examined given the significant increase in tourism numbers.

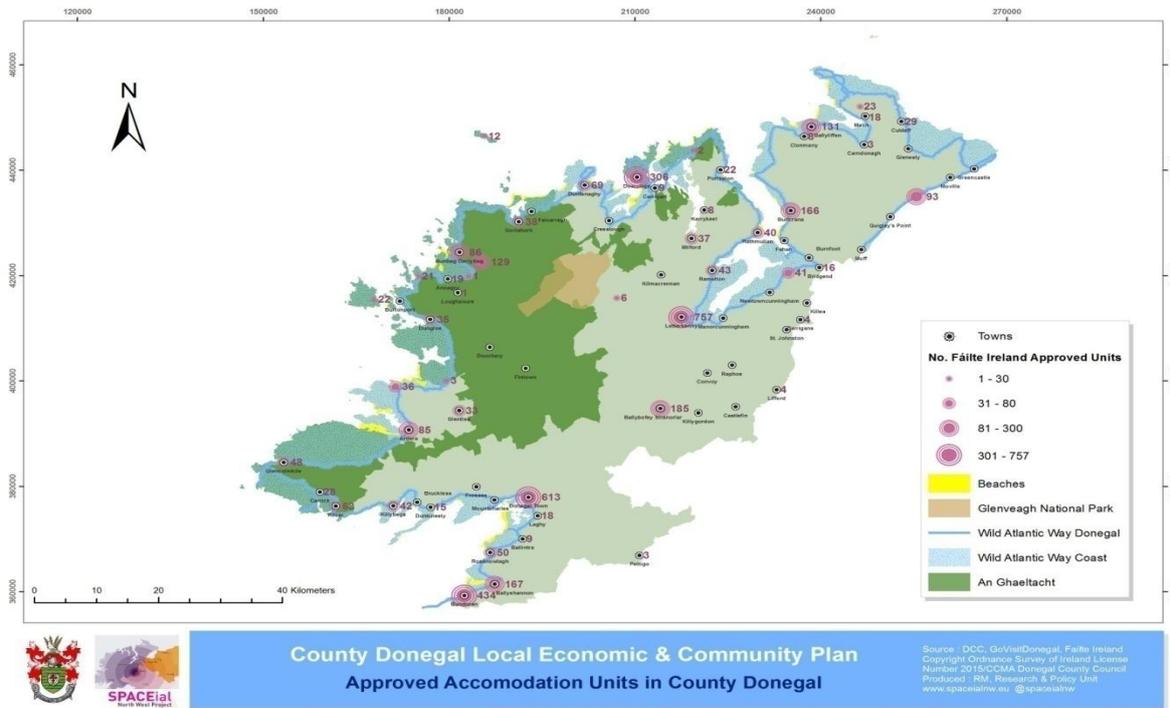
### **7.2.2 Accommodation**

Fáilte Ireland under their quality assurance scheme produces a register of accommodation units by county each year. These have been extracted for Donegal in 2015<sup>xxv</sup> and amalgamated to their respective town area. These are presented in relation to the Wild Atlantic Way, to illustrate the availability of accommodation to cater for the potential update in demand give the increasing success of the WAW. This illustrates that there are

<sup>22</sup> Fáilte Ireland's Holidaymaker Study 2013 – Donegal/Sligo

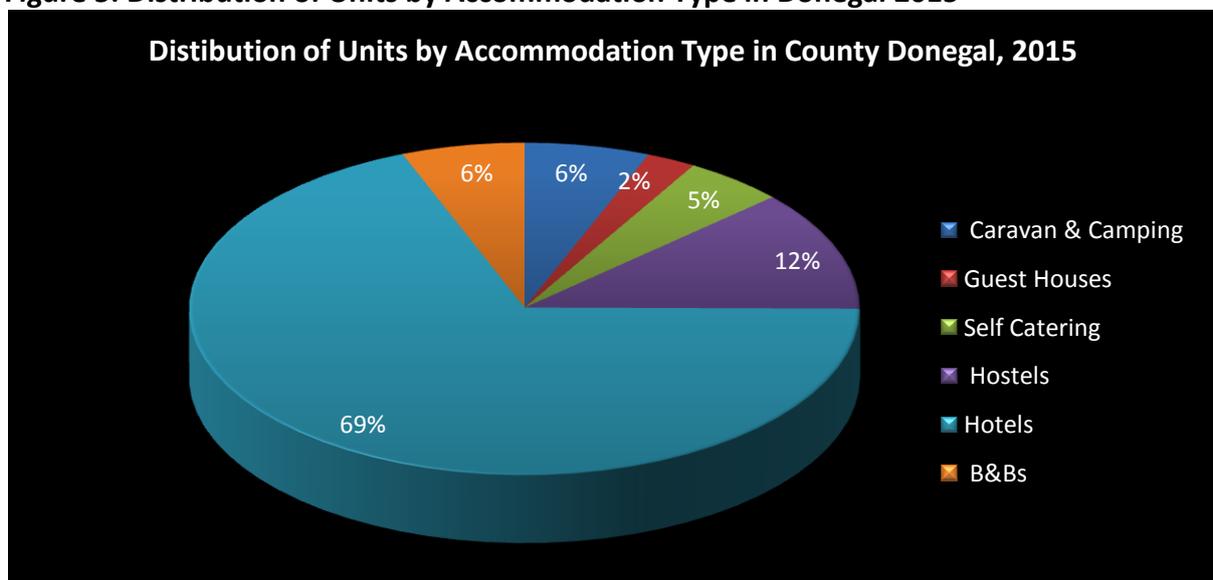
currently 3,750 units along the 550km route. Analysis of the geographical identifies concentrations of accommodation supply clustered around key settlements. Accepting that there are additional unapproved units along this route, this still illustrates the growing demand for increased accommodation provision. The potential for farm diversification into accommodation provision.

**Figure 4: Approved Accommodation Units in Donegal**



Examining the distribution of Fáilte Ireland approved accommodation units illustrates that there is a clear dominance by the Hotel Sector providing 69% of all units in the County. The lower levels of provision across the other sectors provides an opportunity for rural communities to make up this deficit through small scale conversions, existing farmhouses, outhouses and available land for camp and caravan parking. Of the 248 units available through camp and caravan parking, these are located at 6 sites ( 3 of which are located in the Downings/Rossguill area, 1 in Ballyshannon , 1 Portsalon and 1 in Rosbeg) leaving large areas of the WAW without such approved accommodation.

**Figure 5: Distribution of Units by Accommodation Type in Donegal 2015**



### 7.3 Area Needs Assessment: Building on Our Strong Tourism Base

Donegal has all the components to be a leading County in terms of tourism. A strong tourism base already exists and tourist numbers continue to increasing annually. It is now essential that high quality tourism services are in place to cater for this growth. A clear opportunity now exists for rural communities to tap into this growing industry, and in doing so the visitor experience will be further enhanced, including greater access to the range of information required by visitors to the County. To achieve this, more focused development is required in the following areas:

**Marketing & Promotion:** While strategic marketing is successfully taking place in terms of promoting the County as a great place to visit, more localised promotion is required by local agencies, communities, businesses and individuals to ensure that tourists are aware of the vast amount of attractions across the County and how they can access them. It is important to create awareness within communities of everyone's role in tourism promotion. Significant opportunities exist to develop online and downloadable applications to assist tourists in navigating the many routes and in finding the many attractions and services the County has to offer. Such initiatives must be coordinated, adaptable and comprehensive.

**Rural Diversification:** As the number of visitors increase, Donegal's rural communities, businesses and individuals must be ready to tap into this valuable resource by creating new tourism related enterprises and services. Not only will this result in an enhanced tourism offer for visitors, it will also supplement incomes for rural communities. This is particularly attractive for those communities along the Wild Atlantic Way, where opportunities exist to reuse vacant houses and other structures to provide accommodation, cafe's, shops, etc.

**Creating Recreational Access:** There is enormous potential among rural communities in the County to develop tourism trails as a means of increasing tourist footfall locally through the promotion of the many smaller scale or lesser known unique cultural, natural and built heritage features our such as our shipwrecks, geological sites, our unique islands, historic towns and villages, archaeology, rare birds and animals, our uplands, etc.

**Coordinating Our Tourism Offer:** There are many opportunities for new and existing companies in the tourism sector to combine their services in order to offer ready made package holidays incorporating multiple destinations and activities around the County.

**Tourism Infrastructure:** As visitor numbers increase, we must ensure that adequate facilities are available throughout the County. This is particularly important given the transient nature of the Donegal tourism industry as a result of initiatives such as the Wild Atlantic Way. Businesses and communities must play their part in providing public conveniences, parking, waste services. Projects and initiatives must ensure such services will be provided.

**Tourism Product Development:** The development of new and expansion of existing tourism products is encouraged. Areas of our built, natural and cultural heritage offer many opportunities to give visitors a different experience through for example watersports, horse riding, walking, rock climbing, island hopping, cruising in our sea loughs and inland waterways. Opportunities exist to facilitate tourists and local communities alike with safer and greener transport options through the development of our waterways, off road trails and cycle ways.

**Diaspora:** Through initiatives such as the gathering, the strength and benefits of our diaspora is clear. Other initiatives to engage with our diaspora are encouraged, particularly from a tourism perspective.

**Accommodation & Ancillary Facilities:** Initial examination of accommodation levels around the County, show an existing and future need to increase provision in a wide range of locations. Recent tourism surveys have identified that visitors to the region are seeking unique accommodation experiences as part of their stay. Therefore projects which seek to increase accommodation provision such as through the reuse of historic and unique buildings, structures and objects are welcomed. Alternatives in this regard include the range of glamping options, motor-home parking and services, bunkhouses, bothys, disused agricultural and industrial structures, pods, etc.

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<sup>i</sup> Due to data confidentiality a full set of statistical data is not available for the Town of Gleneely therefore the following analysis is based on 60 towns.

<sup>ii</sup> Either UK, Polish, Lithuanian, Other EU 27, Rest of World

<sup>iii</sup> The total labour force is the sum of persons at work, unemployed and first time job seekers and in 2011 this equated to 33,132 persons

<sup>iv</sup> 44,247 persons

<sup>v</sup> Urbanisation has marginally increased in County Donegal since 2006 where there were 25% of the population residing in aggregate urban areas. The two new towns making it into the aggregate urban category are An Bun Beag-Doirí Beaga and Lifford. In addition Merville (1,481) & Convoy (1,438) narrowly missed this classification in 2011

<sup>vi</sup> <http://healthland.time.com/2013/07/29/were-living-longer-and-healthier/>

<sup>vii</sup> The All-Island Research Observatory (AIRO)

<sup>viii</sup> This can be due to a number of reasons, in that the household could have chosen not to take up access, connections may not be available etc

<sup>ix</sup> Excluding the activities of holding companies

<sup>x</sup> compared to -13.8% nationally

<sup>xi</sup> compared to 3.7% nationally

<sup>xii</sup> Which is calculated as the sum of persons unemployed or first time job seekers as a percentage of the labour force

<sup>xiii</sup> 28% in the State

<sup>xiv</sup> 18% in the State

<sup>xv</sup> 28.9% in 2006

<sup>xvi</sup> Biomass is fuel developed from organic materials and renewable and sustainable sources of energy, from forestry debris, scrap lumber, certain crops, manure etc

<sup>xvii</sup> 48% of all broadleaf in Donegal.

<sup>xviii</sup> 28% of all broadleaf in State

<sup>xix</sup> [http://www.sfpa.ie/Sea-](http://www.sfpa.ie/Sea-FisheriesConservation/FisheriesStatisticsandQuotaUptake/AnnualLandingStatistics.aspx)

[FisheriesConservation/FisheriesStatisticsandQuotaUptake/AnnualLandingStatistics.aspx](http://www.sfpa.ie/Sea-FisheriesConservation/FisheriesStatisticsandQuotaUptake/AnnualLandingStatistics.aspx)

<sup>xx</sup> For example Gola, Aranmore, Tory, Inch, Inishboffin etc

<sup>xxi</sup> For example Tullan Strand, Rossnowlagh, Fintra Bay, Marble Hill etc

<sup>xxii</sup> Located in Ballyliffen, Muragh, Stranorlar, Bunrana etc

<sup>xxiii</sup> Ards Forest Park; Glenveagh National Park; Swan Park, Ballymacool Town Park; Barrack Hill etc

<sup>xxiv</sup> Donegal Castle, Inch Castle, the Ring Fort at Grianan an Aileach, The standing stone circle at Beltany, Kildonney Dolmen etc

<sup>xxv</sup> Register of Accommodation, 2015 Fáilte Ireland