

The State of Competition in Ireland

Barriers to Expansion Report

December 2025



Coimisiún um
Iomaíocht agus
Cosaint Tomhaltóirí

Competition and
Consumer Protection
Commission

Executive summary

This report delivers a comprehensive, evidence-based assessment of the key factors shaping business expansion in Ireland. Drawing on over 500 survey¹ responses from commercial decision-makers across all regions and sectors, the findings provide an overview of business expansion plans and the principal barriers that must be addressed to enhance Ireland's economic potential.

Survey insights:

- **Expansion activity:** More than half of Irish businesses (54%) have not expanded in the past three years, and 56% have no plans to do so in the next three years. Satisfaction with current operations, operational constraints and demographic factors such as retirement are the main reasons cited. This inertia dampens market dynamism, reduces competitive pressure and restricts innovation and consumer choice.
- **Regional and sectoral gaps:** Expansion plans are notably higher among Dublin-based businesses (52%) than in other regions (32–36%). Manufacturing and hospitality sectors, as well as smaller businesses, face the most acute barriers, particularly around regulatory compliance, financial constraints and staffing.
- **Barriers identified:** At a basic level, the four most significant obstacles to expansion reported were:
 - Difficulty recruiting suitable employees
 - High operating costs
 - Challenges raising capital (Government supports, private investors, banks)
 - Adverse global economic conditions, especially for younger and internationally active businesses

Advanced analysis results:

Basic survey results, as set out above, only show individual challenges in isolation and can miss how barriers are connected. That's why we use advanced analysis to reveal the deeper patterns and relationships between these issues.

¹ Fieldwork conducted by Ipsos MRBI in 2025. Analysis conducted by the CCPC.

- **Principal component factor analysis**

To move beyond surface-level findings, the report applies Principal Component Factor (PCF) analysis, which distils the complex web of barriers into four core, interrelated factors affecting businesses in Ireland: (i) Competitive environment; (ii) Knowledge gaps; (iii) Financial capacity (iv) Administration & skills.

- **Cluster analysis**

Cluster analysis segments Irish businesses into four groups:

- Market leaders: Strong across all factors; policy should focus on supporting innovation leadership and ensuring fair competition.
- Financially resilient but knowledge-constrained: Need enhanced market intelligence, skills development and institutional coordination.
- Vulnerable businesses: Disadvantaged across all factors; require capacity building, advisory services and improved access to finance.
- Knowledge-driven but financially constrained: Possess innovation potential but lack resources to scale; need support for finance access and innovation commercialisation.

It is important to note that there is no significant association between clusters and business sector, size, age and operating area. The lack of demographic differentiation suggests that the commonalities that exist between businesses in a cluster are based on perceptions of expansion barriers rather than on business demographics. Policy responses should therefore focus on the underlying barrier profiles rather than targeting by sector, size or geography.

Recommended priority areas for government:

The priority areas outlined in this report are strategically anchored in the four decisive factors, representing barriers to expansion for Irish businesses, as identified by this research: (i) competitive environment, (ii) knowledge gap (iii) financial capacity, and (iv) administration &

skills. Addressing these challenges is essential to unlock Ireland’s full economic potential and ensure a fair, dynamic marketplace. This targeted approach ensures that policy responses are both evidence-based and impactful, directly supporting the competitiveness and resilience of Irish enterprises in a rapidly evolving market environment. The identification of key clusters further enables tailored solutions, maximising the effectiveness of policy measures and fostering sustainable economic progress.

Barriers to Expansion in Ireland
<p>Competitive Environment, barriers include:</p> <ul style="list-style-type: none"> • <i>Price agreements and other anti-competitive strategies by established businesses</i> • <i>Competing with established businesses</i> • <i>Achieving profitability</i> <p><i>Targets cluster group 3</i></p>
<p>Knowledge Gap, barriers include:</p> <ul style="list-style-type: none"> • <i>Lack of information on market opportunities at national level</i> • <i>Lack of information on market opportunities abroad</i> • <i>Difficulty accessing mentoring or advisory supports</i> <p><i>Targets cluster groups 2 and 3</i></p>
<p>Financial Capacity, barriers include:</p> <ul style="list-style-type: none"> • <i>Raising capital via banks (includes loans and credit)</i> • <i>Raising capital via private institutions</i> • <i>Cash flow limitation</i> • <i>Raising capital via govt supports (includes loans)</i> <p><i>Targets cluster groups 3 and 4</i></p>
<p>Administration and Skills, barriers include:</p> <ul style="list-style-type: none"> • <i>Recruiting suitable employees</i> • <i>Administration burden</i> • <i>Retraining skilled staff</i> <p><i>Targets cluster groups 2 and 3</i></p>

Ireland's future competitiveness depends on tackling these barriers with nuanced, evidence-based policies that reflect the diversity of businesses' experiences. By addressing the specific needs of different business segments and removing systemic obstacles, Ireland can unlock greater innovation, productivity and consumer benefit.

1. Business expansion trends and implications for competition in Ireland

Barriers to expansion are not just isolated challenges for individual businesses – they are fundamental determinants of Ireland’s broader economic vitality and competitiveness. These barriers, which can vary in nature, directly influence the ease with which existing businesses can grow.

Barriers to expansion can often disproportionately affect smaller businesses, which are the backbone of Ireland’s entrepreneurial ecosystem. When these businesses struggle to expand, the entire market suffers from reduced competitive pressure, less innovation, and fewer choices for consumers.

Over the past three years, more than half of businesses (54%) have not pursued expansion, and a similar proportion (56%) indicate no intention to expand in the coming three years. The most frequently reported reason for this lack of expansionary activity is satisfaction with current operations (36%), suggesting that many businesses are content with their existing market position and scale. By contrast, operational constraints (14%) are the second most offered reason for businesses not pursuing expansion over the past three years.

The third most frequently cited reason for not pursuing business expansion is retirement or age (11%), indicating that a proportion of business owners are approaching the end of their working lives or are planning to exit the market in the near future. This demographic factor is particularly relevant in the context of Ireland’s business landscape, where many businesses are small and/or family-run enterprises.

For those who did attempt to expand in the past three years, a significant majority (88%) reported that their efforts were successful. These efforts were mainly focused on: (i) scaling-up existing operations (74%); (ii) expanding workforce or recruitment (58%); (iii) launching a new product/service (56%); (iv) expanding into a new customer segment (54%).

The absence of expansionary ambition for a large share of businesses has important implications for the broader competitive landscape. When a large share of businesses chooses not to grow, it can dampen market dynamism and reduce the competitive pressure faced by incumbent businesses. This, in turn, may result in fewer new entrants, less innovation and a narrower range of choices for consumers. In highly competitive markets, the threat of new or

expanding rivals typically drives businesses to improve efficiency, invest in innovation and enhance customer offerings. Conversely, when expansion is limited, incumbents may face less incentive to innovate or lower prices, potentially leading to stagnation within the sector.

Furthermore, the presence of retirement/age as a reason for not expanding suggests that succession planning and generational renewal are challenges for Irish businesses. Without clear plans for leadership transition or incentives for younger entrepreneurs to take over or start new ventures, there is a risk that market dynamism could be further constrained. This trend, when combined with general satisfaction with current operations, may contribute to a more static competitive environment, with fewer new entrants and less pressure on incumbents to innovate or adapt.

When it comes to future expansion, there is significant regional disparity. While 52% of businesses based in Dublin plan to expand in the next three years, in the rest of Leinster (36%), Munster (36%) and Connaught/Ulster (32%), expansion plans appear more cautious.

2. Barriers to expansion

2.1 Survey analysis

Most challenging barriers to expansion	Structural
Recruiting suitable employees	2.15
Cost of operating a premises	2.59
Raising capital via govt supports	2.71
The global economic environment	2.73
Least challenging barriers to expansion	Structural
Difficulty accessing mentoring or advisory supports	3.40
Limited access to physical infrastructure or logistics	3.55
Difficulty accessing specific technologies	3.59
Issues resolving Business to Business transactions	3.63
Mean of all barriers to expansion	3.07

The most pervasive barrier to business expansion in Ireland is the difficulty in recruiting suitable employees. Nearly half of all businesses (45%) identify this as their primary challenge, with the issue being even more pronounced outside Dublin (49%) compared to within the capital (37%).

The cost of operating premises – such as utilities, commercial rates and rent – is cited by 23% of businesses as a significant barrier to growth. This is closely followed by difficulties in raising

capital, through multiple sources such as Government supports (22%), private investors (20%) and banks (17%). Smaller businesses² are disproportionately impacted: 21% report that securing bank financing is a major challenge, compared to just 7% of larger enterprises. These financial constraints are compounded by cost disadvantages relative to established market players, making it harder for new or smaller businesses to scale up and compete effectively. The impact of such constraints is reflected in the proportion of smaller businesses (19%) that view achieving profitability as a major challenge when compared with larger enterprises (12%).

The fourth most significant barrier to expansion for Irish businesses is the global economic environment, reported as a major challenge by 25% of businesses operating for less than 10 years and 21% for businesses in existence for over 10 years. Perhaps as expected, Irish businesses with operations abroad perceive the international economic context to be of particular significance (26%). Some of the barrier cited by businesses as being the least challenging included difficulty accessing technologies and issues resolving business to business transactions.

The sector in which a business operates, in addition to the size of the businesses, can also influence perceptions around barriers to expansion. This is examined in detail in Tables 2 and 3 below, where the lower the mean score the more challenging a barrier is perceived to be.

Table 2: Perceptions of barriers to expansion by sector						
	Administrative, financial & support	Other	Hotels and restaurants	Manufacturing	Professional scientific & technical	Retail and wholesale
Raising capital via private institutions.	2.79	2.94	2.56	2.88	2.83	2.92
Raising capital via banks	3.30	3.16	2.86	3.23	3.08	3.23
Raising capital via govt supports	2.64	2.62	2.55	2.57	2.60	2.90
Cash flow limitation	3.13	3.13	3.12	3.35	3.03	3.24
Cost disadvantages compared to established businesses	3.26	3.35	2.98	3.05	3.07	3.05
Achieving profitability	2.92	3.25	2.66	2.85	2.90	2.90

² With 5 or less employees

The global economic environment	3.00	2.89	2.61	2.50	2.89	2.55
Difficulty accessing new customer bases	3.31	3.07	3.33	3.12	3.10	3.17
Limited access to physical infrastructure or logistics	3.56	3.03	3.46	3.69	3.82	3.50
Difficulty building brand awareness in new markets	3.22	3.07	3.08	2.64	3.11	3.12
Difficulty accessing specific technologies	4.03	3.61	3.46	3.15	3.67	3.44
Costs associated with scaling or upgrading digital systems	2.95	3.03	3.04	2.62	2.87	3.00
Complying with industry-specific regulations	3.20	3.28	3.25	2.79	2.97	3.09
Legal fees and processes associated with expanding	3.29	3.26	3.19	3.01	3.13	3.04
Extensive advertising and promo campaigns by established businesses	3.31	3.34	3.54	3.04	3.45	2.96
Competing with established businesses	3.15	2.87	3.16	3.26	3.12	2.85
Price agreements and other anti-competitive strategies by established businesses	3.23	3.33	3.50	2.89	3.26	2.86
Spare or excess capacity allowing established businesses to lower prices	3.39	2.85	2.97	2.62	3.20	2.82
Recruiting suitable employees	2.27	1.78	2.10	1.80	2.32	2.15
Retraining skilled staff	3.16	3.03	2.88	2.84	3.18	3.07
Admin burden	2.85	2.73	3.19	3.01	2.78	2.84
Cost of operating a premises	2.71	2.78	1.96	2.76	2.99	2.49
Issues resolving Business to Business transactions	3.89	3.65	3.63	3.83	3.70	3.42
Lack of information on market opportunities at national level	3.41	3.04	3.34	3.07	3.36	3.15

Lack of information on market opportunities abroad	3.57	3.07	3.49	2.96	3.40	3.19
Difficulty accessing mentoring or advisory supports	3.29	3.24	3.70	3.41	3.52	3.31
Total mean by sector	3.19	3.05	3.06	2.96	3.13	3.01

Note: Heat map should be interpreted horizontally

Table 3: Perceptions of barriers to expansion by business size						
	1 (self-employed)	2 to 5	6 to 10	11 to 50	51 to 100	101+
Raising capital via private inst.	2.63	2.59	3.32	3.12	3.35	3.11
Raising capital via banks	2.96	3.01	3.62	3.30	3.38	3.70
Raising capital via govt supports	2.64	2.63	2.79	2.68	2.95	3.78
Cash flow limitation	2.94	3.19	3.39	3.21	2.88	3.03
Cost disadvantages compared to established businesses	3.00	3.12	2.94	3.33	3.30	3.42
Achieving profitability	2.91	2.83	3.08	2.65	3.61	3.57
The global economic environment	2.82	2.67	2.66	2.65	3.69	2.66
Difficulty accessing new customer bases	3.15	3.16	3.20	3.32	2.98	3.32
Limited access to physical infrastructure or logistics	3.54	3.48	3.74	3.66	3.40	3.70
Difficulty building brand awareness in new markets	2.98	2.97	3.15	3.33	3.87	3.72
Difficulty accessing specific technologies	3.48	3.66	3.63	3.69	2.64	3.81
Costs associated with scaling or upgrading digital systems	2.90	2.91	2.98	3.13	2.50	3.00
Complying with industry-specific regulations	3.17	3.13	3.02	2.83	3.96	2.92
Legal fees and processes associated with expanding	3.07	3.14	3.26	2.96	2.85	3.39

Extensive advertising and promo campaigns by established businesses	3.21	3.08	3.29	3.41	4.00	3.30
Competing with established businesses	2.94	3.04	2.98	2.97	2.90	3.44
Price agreements and other anti-competitive strategies by established businesses	3.08	3.04	3.08	3.41	3.59	2.74
Spare or excess capacity allowing established businesses to lower prices	2.95	2.86	2.99	3.31	3.46	3.07
Recruiting suitable employees	2.44	2.18	1.89	1.82	1.87	1.98
Retraining skilled staff	2.97	3.12	3.19	2.81	3.25	3.18
Admin burden	2.90	2.89	2.86	2.83	2.52	3.03
Cost of operating a premises	2.75	2.59	2.55	2.35	2.38	2.11
Issues resolving B2B transactions	3.72	3.59	3.73	3.45	2.98	3.37
Lack of information on market opportunities at national level	3.15	3.19	3.27	3.40	4.14	2.83
Lack of information on market opportunities abroad	3.31	3.22	3.40	3.34	3.44	3.14
Difficulty accessing mentoring or advisory supports	3.23	3.33	3.43	3.65	3.35	4.02
Totals mean by business size	3.03	3.02	3.13	3.10	3.20	3.21

[Note: Heat map should be interpreted horizontally](#)

Tables 2 and 3 above demonstrate how barriers to expansion are perceived across different sectors and business sizes. As highlighted in Table 2, businesses in the manufacturing sector report the lowest mean score and perceive barriers to expansion to be most challenging. This is particularly the case for manufacturing businesses when it comes to barriers such as the wider economic environment, but most noticeably so on barriers concerning regulatory compliance, economies of scale and the role of established enterprises. For hotels & restaurants, financial challenges including raising capital via different means, achieving profitability and the cost of operating a premises are identified as markedly difficult obstacles

to overcome. Staffing challenges are perceived as problematic for hotels & restaurants as well as manufacturing businesses.

Table 3 outlines how perceptions of barriers to expansion vary significantly by business size. For instance, smaller businesses view raising capital as a more substantial issue than larger businesses, who see the cost of operating a premises and issues resolving business-to-business transactions as more of a challenge. Additionally, for the largest businesses, information gaps on how best to pursue market opportunities domestically and internationally present as significant barriers.

2.2 Principal component factor analysis

A common problem with basic survey analysis when applied to a complex topic like barriers to expansion is that it looks at each issue – such as profitability, funding, or costs – as if they are entirely separate. In reality, these challenges are often closely linked. For example, a business struggling to make a profit may also have trouble raising money and face higher costs, all of which are part of the same financial capacity barrier.

When surveys analyse these connected problems in isolation, it can make the results confusing and less useful. It may also exaggerate the importance of some issues or hide which barriers are truly the most significant.

To provide clearer and more meaningful insights, we used a method called Principal Component Factor (PCF) analysis. This technique groups related survey responses together, showing which core challenges are most important. By doing this, we can better understand the main barriers businesses face.

Table 4: Factors describing the underlying dimensions of barriers to expansion

	<i>Factor 1</i>	<i>Factor 2</i>	<i>Factor 3</i>	<i>Factor 4</i>
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	Competitive environment	Knowledge gaps	Financial capacity	Administration & skills
Raising capital via private inst.	0.19	0.18	0.79	0.15
Raising capital via banks	0.14	0.12	0.83	0.09
Raising capital via govt supports	-0.06	0.36	0.67	0.14
Cash flow limitation	0.29	0.07	0.72	0.10
Cost disadvantages compared to established businesses	0.48	0.19	0.33	0.14
Achieving profitability	0.60	-0.09	0.33	0.21
The global economic environment	0.56	0.04	0.22	0.23
Difficulty accessing new customer bases	0.37	0.45	0.21	0.09
Limited access to physical infrastructure or logistics	0.33	0.31	0.38	0.10
Difficulty building brand awareness in new markets	0.41	0.37	0.25	0.08
Difficulty accessing specific technologies	0.20	0.45	0.42	0.26
Costs associated with scaling or upgrading digital systems	0.27	0.29	0.40	0.36
Complying with industry-specific regulations	0.34	0.09	0.11	0.59
Legal fees and processes associated with expanding	0.33	0.27	0.36	0.53
Extensive advertising and promo campaigns by established businesses	0.56	0.56	0.14	0.15
Competing with established businesses	0.66	0.42	-0.04	0.05
Price agreements and other anti-competitive strategies by established businesses	0.69	0.41	-0.01	0.16
Spare or excess capacity allowing established businesses to lower prices	0.59	0.38	0.11	0.16
Recruiting suitable employees	0.03	0.21	0.06	0.71
Retraining skilled staff	0.00	0.26	0.15	0.64
Admin burden	0.25	0.14	0.05	0.71
Cost of operating a premises	0.42	-0.01	0.26	0.47
Issues resolving B2B transactions	0.48	0.31	0.25	0.24
Lack of information on market opportunities at national level	0.14	0.76	0.19	0.25
Lack of information on market opportunities abroad	0.24	0.74	0.17	0.22
Difficulty accessing mentoring or advisory supports	0.15	0.72	0.22	0.25
% of variance explained	0.1510	0.1422	0.1382	0.1141
Cronbach's alpha	0.8226	0.8126	0.7940	0.6647
<i>Notes:</i> Extraction method: Principal component factor analysis. Number of retained factors: 4 factors. Rotation method: Varimax with Kaiser normalisation. Values in bold indicate the barriers included in the factors (≥ 0.60)				

As outlined in Table 4 above, barriers to expansion in Ireland are best understood across four factors – *competitive environment*, *knowledge gaps*, *financial capacity* and *administration &*

skills. Any barrier with a score of greater or equal to 0.60 is considered to be a significant influence and is used along with other barriers highlighted, to identify that factor's theme/title. A robust PCF analysis was used to identify these factors, which combined account for 55% of the variance in the data, playing a meaningful role in describing barriers to expansion. The reliability of these factors is underlined by strong Cronbach alpha scores³ for each of competitive environment, knowledge gaps and financial capacity, confirming that the grouped barriers genuinely reflect distinct and meaningful challenges for businesses. Although the administration & skills factor falls short of the conventional reliability threshold (i.e. Cronbach Alpha ≥ 0.70), it remains a key factor in stressing the difficulties for businesses in hiring and retraining staff as well as dealing with the administrative burden of operating an enterprise.

The first factor, referred to as the competitive environment, is characterised by expansion challenges relating to the role of incumbents, difficulty achieving profitability and the wider economic context. This factor includes: *price agreements and other anti-competitive strategies by established businesses; competing with established businesses; and achieving profitability.*

Our second factor, referred to as knowledge gaps, comprises barriers concerning businesses' ability to obtain the information required to pursue market opportunities and seek supports. The barriers highlighted here are: *lack of information on market opportunities at national level; lack of information on market opportunities abroad; and difficulty accessing mentoring or advisory supports.*

The third factor is financial capacity and comprises the following expansion barriers: *raising capital via private investors, via banks and via government supports; and cash flow limitations.*

The final factor, administration & skills, highlights three key barriers relating to recruitment namely: *recruiting suitable employees; retraining skilled staff; and admin burden.*

³ A Cronbach's alpha score is a measure of a test's internal consistency, indicating how closely related a set of items are.

2.3 Cluster analysis

Cluster analysis allows us to find hidden groupings in our data. Each cluster grouping contains businesses who provided similar responses about their perceptions of barriers to expansion. By identifying clusters in this way, we can better understand patterns in how businesses differ in their ability to overcome potential barriers to expansion. Assessing businesses based on the factors set out in Table 4 above reveals which combinations of factors create the most significant obstacles for new entrants.

The analysis below segments 504 businesses into four distinct clusters based on standardised scores for each of the factors uncovered in the PCF analysis in the previous table. The cluster means represent the average standardised score for each factor within each cluster group:

- Positive mean score: A cluster group has a stronger advantage on a factor than businesses outside of that cluster group.
- Negative mean score: A cluster group has a weaker advantage on a factor than businesses outside of that cluster group.

The greater the magnitude of a score, the further from the mean that a cluster is positioned.

Table 5: Cluster Group Analysis				
	Competitive environment	Knowledge gap	Financial capacity	Administration & skills
Group 1 Mean	1.084026	0.902604	1.001034	1.131509
Number of businesses	118	118	118	118
Group 2 Mean	0.024969	-0.1375	0.466702	-0.28915
Number of businesses	165	165	165	165
Group 3 Mean	-1.21602	-1.2121	-0.89709	-0.96943
Number of businesses	104	104	104	104
Group 4 Mean	-0.0476	0.361007	-0.87035	0.128308
Number of businesses	117	117	117	117

Our results identify the following cluster profiles:

Group 1 – Market leaders, strong financial capacity and staffing capabilities

This group hold advantages relative to other groups across all four factors – *competitive environment, knowledge gap, financial capacity and administration & skills*. They have higher levels of knowledge about market opportunities and are better placed to deal with extra recruitment and increased administration burden that comes with expansion. This combination positions them as the most competitive and resilient group, likely to lead innovation and sustain long-term growth.

Group 2 – Weak on knowledge and staffing but demonstrating relative financial resilience

This group has an advantage in financial capacity and is neutral on competitive environment issues. Although they have the capital to invest and grow, information asymmetry on growth opportunities and challenges in staff recruitment hinder their ability to expand. Their main challenge is leveraging their financial strength to build internal capacity and improve competitiveness.

Group 3 – Negative across all factors, particularly on competitive environment and knowledge gaps, making them the most vulnerable group

This group faces disadvantages relative to other groups across all factors. They face challenges in achieving profitability in competitive markets, lack the financial resources to invest in growth and suffer from gaps in knowledge and skills. These businesses are most vulnerable to market pressures and anti-competitive behaviours by dominant players. Without targeted support, their long-term survival is threatened and some risk becoming “zombie businesses” – businesses that continue to operate despite struggling for economic viability, generating little financial return and failing to invest in productivity improvements.

Group 4 – Positive in knowledge and administration & skills. Weaknesses in financial capacity could be limiting

This group has advantages relative to other groups in knowledge gaps and administration & skills but are disadvantaged in financial capacity. They are not heavily constrained by competitive pressures but lack the resources to scale. These businesses often possess

innovation potential, yet limited access to finance prevents them from commercialising ideas or expanding their market presence.

In order to see if the distribution of businesses across clusters is associated with sector, age, size and regional scope, we ran an additional analysis examining this association (see Appendix). There was no significant association between clusters and business sector, size, age and operating size. The lack of demographic differentiation suggests that barriers to expansion are not confined to specific business types or locations. The commonalities that exist between businesses in a cluster are based on perceptions of expansion barriers rather than on business demographics.

Policy responses should therefore focus on the underlying barrier profiles rather than targeting by sector, size or geography.

Appendix A: Barriers to expansion: Additional cluster analysis

The expected frequency in the chi-square table is calculated under the assumption that two variables are independent – i.e. *If cluster and sector were unrelated, how many businesses would we expect in this cell.* The chi-square (χ^2) test assesses whether the distribution of businesses across clusters is significantly associated with sector, age, size and regional scope.

For any cell the expected count is: Row total x Column total / Grand Total

If **Observed > Expected**, a variable is disproportionately common in that cluster.

If **Observed < Expected**, a variable is less common than we would predict.

Table 1: Expected frequency: Clusters by sector (effect size)

(k=4)	Administrative, financial & supports	Other	Hotels & restaurants	Manufacturing	Professional, scientific & technical	Retail & wholesale	Total	
1	28	7	14	4	26	39	118	frequency
	21.1	8.4	15.7	8.7	23.2	41	118	<i>expected frequency</i>
2	21	13	21	16	33	61	165	frequency
	29.5	11.8	21.9	12.1	32.4	57.3	165	<i>expected frequency</i>
3	14	8	15	10	14	43	104	frequency
	18.6	7.4	13.8	7.6	20.4	36.1	104	<i>expected frequency</i>
4	27	8	17	7	26	32	117	frequency
	20.9	8.4	15.6	8.6	23	40.6	117	<i>expected frequency</i>
Pearson chi2(15) = 19.5395 Pr = 0.190								
Cramer's V = .11367909								

Table 2: Expected frequency: Clusters by age (effect size)

Cluster ID	Less than 3	4-6 years	7-10 year	More than	Prefer no	Total	
1	2	2	5	108	1	118	frequency
	3	2.1	7.3	105.1	0.5	118	<i>expected frequency</i>
2	4	3	9	149	0	165	frequency
	4.3	2.9	10.1	147	0.7	165	<i>expected frequency</i>
3	4	1	11	87	1	104	frequency
	2.7	1.9	6.4	92.7	0.4	104	<i>expected frequency</i>
4	3	3	6	105	0	117	frequency
	3	2.1	7.2	104.2	0.5	117	<i>expected frequency</i>
Pearson chi2(12) = 9.1783 Pr = 0.688							
Cramer's V = .0779123							

Table 3: Expected frequency: Clusters by size (effect size)

Cluster ID	1 (self-	2 to 5	6 to 10	11 to 50	51 to 100	101+	None	Prefer no	Total	
1	20	52	20	14	0	2	10	0	118	frequency
	23.9	50.1	19.7	15.2	1.4	2.8	4.7	0.2	118	<i>expected frequency</i>
2	35	61	32	24	5	6	2	0	165	frequency
	33.4	70.1	27.5	21.3	2	3.9	6.5	0.3	165	<i>expected frequency</i>
3	22	51	13	11	0	2	5	0	104	frequency

	21	44.2	17.3	13.4	1.2	2.5	4.1	0.2	104	<i>expected frequency</i>
4	25	50	19	16	1	2	3	1	117	frequency
	23.7	49.7	19.5	15.1	1.4	2.8	4.6	0.2	117	<i>expected frequency</i>

Pearson chi2(21) = 28.2571 Pr = 0.133

Cramer's V = .13670613

Table 4: Expected frequency: Clusters by regional scope (effect size)

Cluster ID	Local area	Republic	Northern	International	Prefer no	Total	
1	79	34	0	5	0	118	frequency
	73.8	40	0.2	3.7	0.2	118	<i>expected frequency</i>
2	96	62	0	6	1	165	frequency
	103.1	56	0.3	5.2	0.3	165	<i>expected frequency</i>
3	72	29	0	3	0	104	frequency
	65	35.3	0.2	3.3	0.2	104	<i>expected frequency</i>
4	68	46	1	2	0	117	frequency
	73.1	39.7	0.2	3.7	0.2	117	<i>expected frequency</i>

Pearson chi2(12) = 12.3681 Pr = 0.417

Cramer's $V =$

.09044327