GMIT
Strategic Planning Session

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The Socio-economic Profile of the Western Region

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Outline

- The Western Development Commission (WDC) – What we do
- The Western Region – Profile
- The Western Region – Labour Market profile
- Western Region – Economic sectors, Growth Sectors
- Education – Census 2016
- Futures – Some Issues to consider: Brexit, Accessibility, types of work,
- Ireland 2040 NPF vision
- Further information
Western Development Commission (WDC)

- 7 county Western Region

- State body – Department of Rural and Community Development (DRD)

- WDC Act 1998
  ‘….foster and promote the economic and social development of the Western Region’
WDC – What we do

- Inform policy-making through analysis of Region’s issues & needs (e.g. infrastructure, labour market)
- Promotion – www.lookwest.ie
- Development of region’s resources: Creative sector, Tourism, Renewable energy
- WDC Investment Fund – Risk capital to SMEs
Policy team – What we do

- Inform **policy**-making through **analysis** of region’s issues & needs (e.g. labour market, infrastructure)

- Focus on:
  - Socio-economic Analysis
    - Census, employment, income, output, sectoral
  - Infrastructure
    - Transport: Rail, aviation, road
    - Energy: Electricity, Natural Gas, Renewables
    - Broadband
  - Engaging with policy formulation/ monitoring
  - Policy Recommendations – NPF, Capital Plan, Sectors
Policies for Regional Growth – Levers of Regional Development

- Infrastructure,
- The ‘3Es’ (Enterprise, Employment & Education) and
- Innovation are the key levers for effective regional development. When they work together they drive regional growth.
The Western Region – 2016 Profile

- 828,697 people (2016)
- Share of national population
  - 1841: 30.7%
  - 2016: 17.4%
- Population change 2011-2016
  - 0.95% in WR v 3.8% in State
  - Home to only 2 counties in Ireland with pop decline
- 64.7% live in rural areas v 37% in State
- Urban centres: 1 city; 5 towns 10,000+; 34 towns 1,500-9,999
# WR Region Profile – Census 2016: Population Change

<table>
<thead>
<tr>
<th></th>
<th>Population 2016</th>
<th>Actual Change (2011-2016) (No.)</th>
<th>Percentage Change (2011-2016) (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Galway City</td>
<td>78,668</td>
<td>3,139</td>
<td>4.2</td>
</tr>
<tr>
<td>Galway County</td>
<td>179,390</td>
<td>4,266</td>
<td>2.4</td>
</tr>
<tr>
<td>Mayo</td>
<td>130,507</td>
<td>-131</td>
<td>-0.1</td>
</tr>
<tr>
<td>Roscommon</td>
<td>64,544</td>
<td>479</td>
<td>0.7</td>
</tr>
<tr>
<td>West Region</td>
<td>453,109</td>
<td>7,753</td>
<td>1.7</td>
</tr>
<tr>
<td>State</td>
<td>4,761,865</td>
<td>173,613</td>
<td>3.8</td>
</tr>
</tbody>
</table>
WR Profile – Aspects of Population Change

Pop change
Galway city 4.2%
Co. Galway 2.4%
Co. Roscommon 0.7%
Mayo -0.1%
Donegal -1.2%

Age Profile: State average age = 37.4 years
Galway – 38 years
Mayo – 40.2 yrs
Roscommon – 39.7 yrs
• Dependency: Age (0-14) + (65+)/ (15-64)
  • State – 52.7%
  • Galway city – 39% (lowest nationally)
  • Galway county – 59.2%
  • Mayo – 61.1% (one of the highest)
  • Roscommon – 60.8%

• Dependency ratios also reflect movement of young people to 3rd level and people 65 yrs+ continuing to work
% Living in rural areas in Western counties (2016)

- Clare: 60.7%
- Galway: 54.0%
- Leitrim: 89.3%
- Mayo: 71.4%
- Roscommon: 73.2%
- Sligo: 60.2%
- Donegal: 72.7%
- Western Region: 64.7%
- State: 37.0%

Percentage of people living in rural areas in the Western counties of Ireland (2016).
The Western Region Profile – Key Statistics

- **Income**
  - Household disposable Income Western Region is €16,963 (2014) 88.5% of state avg

- **Output**
  - West Gross value added (GVA) is 71.3% of state avg (2014)
  - Border GVA is 48.2% of state avg (2014)

- **Labour Market**
  - 333,919 people ‘at work’ (2016)
  - 53,811 unemployed (2016)
Western Region – Labour Market Profile

- Population of Working Age (15yrs+)
- Labour Force (economically active) – Employed + Unemployed
- Economically Inactive
  - Retired
  - Students
  - Looking after family, home duties
  - Illness/disability
Population of Western Region aged 15 years and over by principal and labour force status, 2016

- In Labour Force: 387,730 (59.3%) State 61.9%
  - Persons at work: 333,919 (51.1%) State 53.4%
    - Employer/own account worker: 61,107 (9.3%) State 8.3%
    - Employee: 271,787 (41.6%) State 45.0%
    - Assisting relative: 1,025 (0.2%) State 0.1%
  - Unemployed: 53,811 (8.2%) State 7.9%
    - Unemployed having lost/given up job: 48,593 (7.4%) State 7.7%
    - Unemployed looking for first job: 5,218 (0.8%) State 0.8%
- Not in Labour Force: 266,019 (40.7%) State 38.1%
  - Retired: 108,464 (16.6%) State 14.5%
  - Student/Pupil: 74,003 (11.3%) State 11.4%
  - Looking after home/family: 52,090 (8.0%) State 8.1%
  - Unable to work due to illness/disability: 28,632 (4.4%) State 4.2%
  - Others not in Labour Force: 2,830 (0.4%) State 0.4%

Source: CSO, Census 2016 Summary Results – Part 2. Table EZ011. Analysis by Western Development Commission (WDC)
Western Region Labour market profile - Summary

- Western Region compared to State average

- **Lower % in labour force – workers and unemployed**
  - Lower % at work, Higher % unemployed
  - Lower share of employees, higher share of self-employed

- **Higher % Not in Labour Force – retirees mainly**

- But Galway city broadly more similar to State average, rest of region higher % not in LF, share of retirees much higher
The Western Region – Enterprise & Employment

- **Active Enterprises**
  - -0.8% in WR v 3.3% in State (2011-2015)
    - Clare only WR county with increase
- **No. in employment**
  - Growth of 7.5% in WR v 11% in State (2011-2016)
  - 5 of 6 lowest growing counties in State
- **Employment Sectors**
  - More reliant on traditional sectors, public & local services
  - Industry performing very strongly
  - Small but growing knowledge services

% Change in no. employed:
- Clare: 9.2%
- Galway: 4.8%
- Mayo: 9.5%
- Sligo: 6.3%
- Roscommon: 5.9%
- Donegal: 8.6%
Western Region Employment Profile - % of employment by sector (2016)
% of employment by sector in Western Region and Rest of State (2016)

- Industry
- Wholesale & retail
- Health & social work
- Education
- Accommodation & food
- Agri, forestry & fishing
- Public Admin
- Construction
- Prof., scientific & tech.
- Other
- Transport & storage
- Info. & comms
- Fin., insurance & real estate
- Administrative services

Rest of State
Western Region
% of employment by sector in Western Region and Rest of State (2016)

Industry
Wholesale & retail
Health & social work
Education
Accommodation & food
Agri, forestry & fishing
Public Admin
Construction
Prof., scientific & tech.
Other
Transport & storage
Info. & comms
Fin., insurance & real estate
Administrative services

Rest of State
Western Region

Providing insights on key issues for the Western Region of Ireland
Western Region Profile – Regional Growth Sectors

- Renewable energy:
- Creative industries: many creative entrepreneurs attracted to the Western Region by its high quality of life.
- Tourism e.g. a very significant employer
- Agri-food - opportunities especially in value-added
- Medical technology
- Marine
- & others!
Education – Third level – Census 2016

- Dún Laoghaire-Rathdown 61.1%
- Galway City 2nd – 55.2%
- Co. Longford, Wexford lowest 32.5%
- Co Galway 41.3%
- Mayo 34.8%
- Roscommon 35.7%
- Sligo 40.7%
- Leitrim 37.7%
- Donegal 33.4%
- Clare 40.9%
Education –Census 2016- No formal or Primary only

One in five persons (21.9%) in Donegal, aged 15+ had not been educated beyond primary level, the highest for any county.

- Dún Laoghaire-Rathdown - lowest 6.6%
- Galway City 8.6%
- Co. Galway 14.9%
- Mayo 17.4%
- Roscommon 15.5%
- Sligo 14.2%
- Leitrim 15.7%
- Donegal 21.9%
- Clare 12.1%

But this Education profile reflects Jobs profile!
Increase in time travelled

• In 2016, 58.7% of WR students had journey time less than ½ hour, (61.9% in 2011)

• 17% of 3rd level students nationally have a commute of over an hour: Over 16% in Dublin compared to 2.7% in Galway city and suburbs

• Increase in travel by public transport Roscommon by 32.1%, Clare 30.8% (2011-2016)
In Galway almost 2/3 of students walked or cycled to college (66.7%), Cork city 50.1% Limerick 47.2 %, Waterford 43.7 %, Dublin 34.8%

77% of Galway students have a commute of under half an hour, compared with Dublin (39.2%).

Compared to national avg. third level students from WR have shorter travel times - live closer to college?

BUT data on usual place of residence not clear – 10% recorded at different address to usual residence (family home) - latter is CSO guidance!
Some issues to consider – Trends/ Futures

- Western Region Assets
- Brexit impacts – on North West especially
- Education – Accessibility/ Accomodation
- Technology, Work and the changing nature of work
- NPF 2040 vision
Western Region: Key Regional Assets

- Quality of life
- Attractive natural environment
- Tourism potential
- Strength in manufacturing
- Strength and vibrancy of Galway city
- Abundant renewable energy potential
- World-leading medical technology cluster
- Two international airports
- Extensive and ‘green’ food production system and marine resource
- High level of self-employment and self-motivation
- Strong creative sector including links with arts, culture and heritage
Providing insights on key issues for the Western Region of Ireland

Cross border commuting: Border crossings

Donegal - NI Border – highest level of cross border crossings

- Students at school or college – 899 (commuting) (19 years+)
- Secondary School - 707 pupils (aged 13-18)
- Primary School - 693 pupils (aged 5-12)

CSO, Census 2016
## Commuting: Top six origin and destination of cross border workers and students (CSO Census 2016)

<table>
<thead>
<tr>
<th>County</th>
<th>Armagh</th>
<th>Antrim</th>
<th>Down</th>
<th>Derry</th>
<th>Fermanagh</th>
<th>Tyrone</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Donegal</td>
<td>21</td>
<td>252</td>
<td>33</td>
<td>4,256</td>
<td>131</td>
<td>915</td>
<td><strong>5,608</strong></td>
</tr>
<tr>
<td>Monaghan</td>
<td>533</td>
<td>97</td>
<td>89</td>
<td>21</td>
<td>154</td>
<td>218</td>
<td><strong>1,112</strong></td>
</tr>
<tr>
<td>Louth</td>
<td>410</td>
<td>128</td>
<td>350</td>
<td>15</td>
<td>2</td>
<td>21</td>
<td><strong>926</strong></td>
</tr>
<tr>
<td>Cavan</td>
<td>33</td>
<td>19</td>
<td>12</td>
<td>9</td>
<td>396</td>
<td>24</td>
<td><strong>493</strong></td>
</tr>
<tr>
<td>Dublin City</td>
<td>23</td>
<td>81</td>
<td>37</td>
<td>15</td>
<td>2</td>
<td>19</td>
<td><strong>177</strong></td>
</tr>
<tr>
<td>Leitrim</td>
<td>3</td>
<td>10</td>
<td>1</td>
<td>4</td>
<td>113</td>
<td>17</td>
<td><strong>148</strong></td>
</tr>
<tr>
<td>All other counties</td>
<td>123</td>
<td>345</td>
<td>153</td>
<td>87</td>
<td>79</td>
<td>85</td>
<td><strong>872</strong></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1,146</strong></td>
<td><strong>932</strong></td>
<td><strong>675</strong></td>
<td><strong>4,407</strong></td>
<td><strong>877</strong></td>
<td><strong>1,299</strong></td>
<td><strong>9,336</strong></td>
</tr>
</tbody>
</table>
Issues/Trends contd. Access & Accommodation

- Accessibility e.g. new motorway access, improved journey times to key centres & to education services (bus & car especially)

- Accommodation - costs driving student access and choice – over 30% increase in travel to 3rd level by public transport Roscommon & Clare

- Reduced access for those living further from education facilities

- But online access to counteract this trend?
Broader definition of work needed

- Narrow definitions of ‘job’, ‘work’, ‘employer’ – a FT permanent employee travelling every day to specific work location - does not recognise either the current reality or the patterns likely to emerge

- Self-employment – 1 in 5!, e-Working, the ‘gig’ or ‘sharing’ economy, contract work, freelancing, multiple income streams, online business, trends that are dramatically redefining the concept of work, enterprise, and their physical location

- More effective intra-regional transport links e.g. M18 extending labour catchments & open new opportunities
Futures – NPF 2040 Vision?

- Plan to move from ‘Business as Usual’
- Really?

- But focus on 5 cities and importance of Capital!
- Implementation – the importance of sectoral policy as an instrument of change – both capital & current spending
- Little evidence of this in Draft NPF
Policy Implications I – National Planning Framework (NPF)

- Draft NPF – Overall WDC welcomes regional population targets but feels there is little specific to help deliver.
- Move from ‘business as usual’. But focus on 5 cities. North of Galway – what about the North west?
- Potential of regional centres but needs better links and investment.
- State Investment needs to be evaluated in context of supporting better regional balance – (appraisal methodologies).
- Effective implementation.
What about the North West?

- Donegal & Mayo: only counties with population decline 2011-2016
- Roscommon & Mayo: highest decline in enterprise numbers 2011-2015
- Sligo, Leitrim, Donegal & Mayo: highest commercial vacancy rates
- Sligo, Leitrim, Roscommon & Donegal: highest shares working in Public Services

**North West needs a stronger urban centre**

  - With effective linkages to other urban centres throughout region, Sligo can become a more effective regional driver
  - Letterkenny has particular role in North west
  - Towns important too
More on NPF 2040 – Third Level Education

- **National Policy Objective 32**
  - The expansion and consolidation of third level facilities at locations where this will contribute to regional development.
- Welcome but vague! No specifics
- Though the role of third level in supporting regional development is acknowledged, along with the potential of TUs, the only facility mentioned is Grangegeorman in Dublin. The Institutes of Technology in the West and North and proposed TU are important drivers – need to be named.
Alignment with NPF objectives - If you are not in you can’t win!!

Infrastructure

- Communications: National Broadband Plan
- Transport, Roads – Inter-regional links; Atlantic Corridor Limerick to Letterkenny, N6- Galway City by-pass, (N4&N5), Secondary, regional & local roads, Air – Ireland West & Shannon, Rail & bus Transport – accessibility for workers and residents
- Energy infrastructure

BUT Investment in Human capital – a Strong and vibrant third level sector supporting the 3 E’s: education, employment & enterprise, allied to investment in infrastructure and innovation is the recipe for Growth!
Further Information – WDC Policy team outputs

- WDC Insights papers
- WDC Insights Blog
- WDC Reports
- WDC Policy Briefings
- Submissions
- Data and Infographics
WDC Insights

- Short, 2-page analysis of key issues or data
- **19 published to date**
- Targeted at politicians and policy makers
- Published on WDC website, circulated by Mailchimp (530+), blog post & tweet
- May be summaries of longer reports
WDC Insights - the Policy team blog

- Weekly blog on variety of topics: data analysis, policy comment, news and policy issues
- 115 blog posts to date
- 40 blog followers, posts are tweeted
- Recent items: Census, income and poverty, RSES
- Follow the WDC Policy Analysis Team Blog at https://wdcinsights.wordpress.com/
WDC Reports

- Longer, more detailed reports
- Full Designed/Printed or In-house style
- 29 (approx) published to date
- Sectoral Issues, Infrastructure, Data Analysis
- Published on WDC website, circulated by Mailchimp (530+), blog post & tweet
- Previously hard copy posting, but rare now
WDC Policy Briefings

1. Why care about regions?
2. How is the Western Region doing?
3. Air access and the Western Region
4. Education, Enterprise & Employment
5. Why invest in gas?
6. Commuting to Work
7. e-Working in the Western Region: A Review of the Evidence

Published on WDC website, hard copy print run, circulated by Mailchimp (530+), selected hard copy posting, blog post & tweet
National Policy Submissions (examples)

- **Infrastructure**
  - Mid-Term Review of Capital Plan 2016 – 2021
  - Rail Review 2016
  - National Broadband Plan Strategy Intervention
  - Gas Networks Ireland 2016 Ten Year Network Development Plan
  - Draft EirGrid Transmission Development Plan
  - Aviation Policy

- **Regional & Spatial Development**
  - Ireland 2040 – Our Plan: National Planning Framework
  - Census of Population 2021

- **Sectoral**
  - Renewable Heat Incentive
  - Bioenergy Strategy
  - Energy White paper
  - Ocean Wealth
  - Framework for Sustainable Development
Infographics

This is the Western Region

Population in the Region

The Western Region

Western Region: 828,124
State: 4,757,395

Change in Population

Population Change: +0.9%

The Western Region Has

17% urban, 18% suburban, 23% rural

Education: 16%

Energy: 28%

Employment: 34%

Healthcare: 28%

Transport: 15%

Retail: 3/4

Tourism: 9,000

The Western Region Has...

Population in the Region

Western Region: 828,697
State: 4,757,395

Demographics:

49.6% male, 50.4% female

Age Dependency

Children under 15: 23.5%

Working Age: 57.6%

Retired: 17.4%

The Western Region Has

Economic:

GDP: €3.8 billion

Incomes:

Average Income: €28.3k

Unemployment: 7.7%

Migration:

Inflows: 65.5%

Outflows: 21,185

WDC Insights

providing insights on key issues for the Western Region of Ireland
Thank You

Q&A

All publications at www.wdc.ie/publications/

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