WDC Presentation to Galway Chamber of Commerce

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Western Development Commission

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Western Development Commission (WDC)

- 7 county Western Region
- State body – Department of Rural and Community Development (DRCD)
- WDC Act 1998
  ‘....foster and promote the economic and social development of the Western Region’

Regional Promotion
- Lookwest.ie
- Community & Diaspora engagement

Regional Leadership
- Policy analysis
- AEC
- Creative Economy

Sustainable Enterprise
- Western Investment Fund
- Social Enterprise
- Emerging Sectors

providing insights on key issues for the Western Region of Ireland
Overview/Outline

1. The Western Development Commission (WDC) – What we do
2. Western Region – Census 2016
3. Galway – which Galway?!
4. Trends and policy implications
5. Ireland 2040 NPF & Draft RSES for Northern & Western Region/ Southern Region
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
WR profile – Census 2016: Age structure

- **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
Which Galway?

- Which measure for Galway?
- Depends on function/role...
- Urban workers/rural dwellers
- WDC Galway city TTWA (roughly equal to Galway county)
- Galway Metropolitan Areas - MASP

- Data dependent..(Census, IDA, EI data..)
Galway TTWA 2006
providing insights on key issues for the Western Region of Ireland
Rural Dwellers, Urban Jobs - Inward commuters

- WDC Policy Briefing No.6
- Of the 16,700 rural dwellers commuting to Galway gateway (map), 25% work in IDA case study area
- (Rural= living in centres of less than 1,500 and open countryside)
# Outward commuters – to Dublin city

<table>
<thead>
<tr>
<th>Travelling to work in Dublin city</th>
<th>2006</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>N</td>
<td>Total</td>
</tr>
<tr>
<td>Galway</td>
<td>411</td>
<td>64,455</td>
</tr>
<tr>
<td>Sligo</td>
<td>141</td>
<td>20,321</td>
</tr>
<tr>
<td>Ennis</td>
<td>95</td>
<td>21,333</td>
</tr>
</tbody>
</table>
Factors influencing the trends

- Both time periods are similar - strong employment and economic growth
- A considerable increase in the numbers travelling to work in Dublin city - doubled or in some cases nearly trebled (for example Ennis and Roscommon)
- Improved transport between Dublin and the regions
- Better job opportunities
- Some of these positions may allow for some degree of flexibility and working from home for a day or two during the week
- Evidence - a range of data attempting to measure the incidence of e-working or teleworking and most suggest that it is on the increase – e-working policy brief, the gig economy & home-working
Some policy implications for Galway

- Improved transport links important
- People will commute for good work opportunities
- More effective intra-regional transport links e.g. M18 extending labour catchments & open new opportunities e.g. to Limerick, Shannon, Ennis – will support Chambers city regions initiative
- Numbers travelling from Galway to Ennis and Shannon to work has doubled in the 10 yrs (06-16)
- Residence more stable than employment location
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
- Overall WDC welcomes regional population targets but feels there is little specific to help deliver.
- Need for better links, investment and IMPLEMENTATION!

WDC Comment
- Need review of policies e.g. National Ports & Aviation policy to move away from ‘business as usual’.
- Delivering Atlantic Corridor road projects (N17/15/13) should be prioritised earlier (no commitment in NDP to begin construction before 2027).
- All rail routes in region need improved capacity & services, electrification should be considered for rail routes to NWRA.
Capital Investment – 10 year plan

- Alignment with NPF objectives – But much investment to happen later

- 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!
## Population Targets for Urban Centres in Western Region – NWRA RSES

<table>
<thead>
<tr>
<th>Plan</th>
<th>2016 pop.</th>
<th>% increase by 2040</th>
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<tbody>
<tr>
<td><strong>Metropolitan Area Strategic Plan</strong></td>
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<tr>
<td>Galway City</td>
<td>79,900</td>
<td>55%</td>
</tr>
<tr>
<td><strong>Regional Growth Centre Strategic Plan</strong></td>
<td></td>
<td></td>
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<tr>
<td>Sligo</td>
<td>19,200</td>
<td>40%</td>
</tr>
<tr>
<td>Letterkenny (North West City Region MASP)</td>
<td>19,300</td>
<td>40%</td>
</tr>
<tr>
<td>Athlone (mainly in EMRA)</td>
<td>25,000</td>
<td>40%</td>
</tr>
<tr>
<td><strong>Key Towns</strong></td>
<td></td>
<td></td>
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<tr>
<td>Ballina</td>
<td>10,200</td>
<td>30%</td>
</tr>
<tr>
<td>Castlebar</td>
<td>12,100</td>
<td>30%</td>
</tr>
<tr>
<td>Cavan</td>
<td>10,900</td>
<td>30%</td>
</tr>
<tr>
<td>Ballinasloe</td>
<td>6,700</td>
<td>30%</td>
</tr>
<tr>
<td>Carrick-on-Shannon</td>
<td>4,100</td>
<td>30%</td>
</tr>
<tr>
<td>Monaghan</td>
<td>7,700</td>
<td>30%</td>
</tr>
<tr>
<td>Roscommon</td>
<td>5,900</td>
<td>30%</td>
</tr>
<tr>
<td>Tuam</td>
<td>8,800</td>
<td>30%</td>
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Strengths & weaknesses

- Galway city appeal – to visit & live in
- Strong industrial base
- Centre of excellence with large extensive hinterland esp to north.
- Good transport links to south & improving northwards

- Accessibility
- Need to continue to diversify enterprise base – new sectors
Opportunities & Threats

- City regions – Chambers, NPF & AEC GESL, NWRA/SRA
- Regional growth sectors
- Quality of life & congestion elsewhere
- Galway Chamber priorities need to be reflected in Govt Policy – in NPF 2040, RSES, AEC Infrastructure priorities

- Lack of implementation of NPF/ RSES
- Competition - Not other regional cities!
- Need to work with regional cities - GESL to act as counterbalance
Further Information – 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
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 & Submissions

- 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
Infographics

**THIS IS THE WESTERN REGION**

Population in the Region:
- Western Region: 828,124 (Increase: +0.9%)
- State: 4,757,976 (Increase: +0.7%)

**The Western Region Has...**
- Employment: 17%
- Unemployment: 18%
- Self-Employed: 23%
- Manufacturing: 16%
- Retail: 92%

Wind Energy: 28%
Broadband: 34%
Tourism: 28%
Vehicles: 15%
Passenger Freight: 3/4
9,000

**Age Dependency**
- Population in Age 0-14: 33.2%
- Population in Age 65+: 24.2%

**The Western Region Has...**
- Population: 828,697
- Exports: €30,330
- Imports: €55,727
- Exports: €29.3
- Imports: €63.8
- Exports: €52,570
- Imports: €21,189

Source: Central Statistics Office of Ireland, 2016