



WDC Insights

*providing insights on key issues for
the Western Region of Ireland*

Preliminary Results Census 2016

Analysis of results for the Western Region

Deirdre Frost, Helen McHenry and Pauline White, WDC Policy Team
10/6/2016

This report was written by the Policy Team of the Western Development Commission (WDC). It is based on the [Preliminary Results of the Census of Population 2016](#) published by the Central Statistics Office.

If you have any queries please contact:

- Ms Deirdre Frost, Policy Analyst deirdrefrost@wdc.ie
- Dr Helen McHenry, Policy Analyst helenmchenry@wdc.ie
- Ms Pauline White, Policy Analyst paulinewhite@wdc.ie

Follow the [WDC Insights Blog](#)

Follow us on Twitter [@WDCInsights](#)

Contents

- Key Findings..... 5
 - 1.0 Introduction..... 6
 - 2.0 Geographical Population Change 7
 - 2.1 What is the population of the Western Region and how has it changed since 2011? 7
 - 2.2 Was there a difference in population growth by gender? 10
 - 2.3 How does the population in 2016 compare with previous periods? 11
 - 2.4 How did population change at a sub-county level? 14
 - 3.0 Components of Population Change 17
 - 3.1 What caused population change in western counties during 2011-2016?..... 17
 - 3.2 Natural Increase 18
 - 3.3 Net Migration 23
 - 4.0 Housing..... 29
 - 4.1 What is the housing stock in the Western Region? 29
 - 4.2 What were the vacancy rates in 2016? 31
 - 5.0 Conclusion 36

Key Findings

Geographical Population Change

- The preliminary results of Census 2016 show that the Western Region population was 828,124 people in April 2016. The population of the region increased by 7,244 people since 2011 (0.9%).
- The state population was 4,757,976. It increased by 169,724 persons (3.7%) between 2011 and 2016.
- In all counties (and in the Western Region, and the state) there was higher growth in the female population than the male population. In the Western Region there was a 1.5% increase in the female population and 0.2% in the male population. For the rest of the state the difference was not so pronounced (males 4.2%; females 4.4%).
- Donegal was the only county in the state that had a decline in the female population (-0.9%), while five counties, all in the Western Region, had declines in the male population. Decline in the male population was due to greater out-migration among men.
- More EDs in the Western Region experienced population decline (533) than showed population growth (433). Of those that declined, 262 EDs had a population decrease of more than 5%.

Components of Population Change

- Every administrative area in Ireland had a positive natural increase (more births than deaths) during 2011-2016. Donegal, Sligo and Mayo were the only counties in Ireland where the scale of their negative net migration (difference between people moving into and out of the county) was enough to cancel this out and lead to population decline.
- All western counties, except for Galway County (14.8 per 1,000 population), had average annual birth rates below the state average (14.8). Donegal (12.4), Roscommon (12.9) and Mayo (13) had among the lowest in the country.
- Except for Galway city (4 per 1,000 population), all western counties had higher average death rates than the state average (6.3). Galway city is quite unique among Irish cities in having such a low death rate. Leitrim (8.5) and Mayo (8.3) have the third and fourth highest nationally.
- All western counties, and all but six areas nationally, had negative net migration between 2011 and 2016. Donegal (-8.4 per 1,000 population) and Sligo (-6.2) had the two highest rates of negative net migration nationally.

Housing

- In 2016 the Western Region had a housing stock of 404,494, an increase of 0.8% or 3,183 on 2011. Nationally the increase was 0.9% over this period.
- There was a decline in housing stock in three of the western counties – Roscommon -0.5% (-173), Sligo -0.2% (-51) and Leitrim -0.2% (-36), indicating some houses being taken out of the housing stock.
- Even with the limited growth in housing stock between 2011 and 2016, the growth in the housing stock in the Western Region during the decade 2006 to 2016 of 16.4% is still nearly double the population growth in the region over the same period (8.6%).
- The average vacancy rate in the Western Region in 2016 was 21.7%, marginally lower than that in 2006 (22.8%). Nationally, the average vacancy rate in 2016 was 19.9%.
- The Western Region accounts for just under half (48%, 29,418 housing units) of all holiday homes in the state, an increase of 7.1% since 2011.

1.0 Introduction

In April 2016 the Central Statistics Office of Ireland (CSO) conducted a Census of Population. The full results of Census 2016 will be published over the course of 2017 in a series of thematic demographic and socio-economic reports e.g. age, education, housing, economic status.

In July of this year, the CSO published preliminary results of the Census. These are very initial results for a small number of indicators based on the forms completed by the Census Enumerators, and not on the actual Census forms. These results will be subject to revision when the full results are published next year.

It is nevertheless useful to examine the preliminary results as the period 2011-2016 was one of considerable fluctuation and uncertainty in population trends, nationally and in the Western Region, and these results can shed some light on what has occurred.

This Western Development Commission (WDC) report analyses the preliminary results for the seven county Western Region (Clare, Donegal, Galway, Leitrim, Mayo, Roscommon and Sligo). The indicators examined are:

1. Geographical Population Change
2. Components of Population Change
3. Housing

All data was downloaded from the CSO Statbank, Main Data Dissemination Service
<http://www.cso.ie/px/pxeirestat/statire/SelectTable/Omrade0.asp?Planguage=0>

2.0 Geographical Population Change

2.1 What is the population of the Western Region and how has it changed since 2011?

The preliminary results of Census 2016 show that the Western Region population was 828,124 people in April 2016 and the state population was 4,757,976. The total population of the state increased by 169,724 persons (3.7%) between 2011 and 2016 (Table 1). The population of the Western Region increased by 7,244 people in that period (0.9%) which was significantly lower than the percentage increase in the state. In contrast, between 2006 and 2011 there was an increase of 57,516 persons or 7.5% in the population of the Western Region.

Three counties in Ireland, all in the Western Region, experienced population decline over the period: Donegal (-1.5%); Mayo (-0.2%) and Sligo (-0.1%). The highest population growth in the Western Region was in Galway City (5.3%) while Galway County also grew (2.2%). Clare had the next highest population growth (1.2%) and Leitrim and Roscommon had very small population growth (both 0.6%)

Table 1: Population in 2011 and 2016 of western counties, Western Region and rest of state¹

	Population 2011	Population 2016	Actual Change (2011-2016) (No.)	Percentage Change (2011-2016) (%)
Clare	117,196	118,627	1,431	1.2%
Donegal	161,137	158,755	-2,382	-1.5%
Galway City	75,529	79,504	3,975	5.3%
Galway County	175,124	179,048	3,924	2.2%
Leitrim	31,798	31,972	174	0.6%
Mayo	130,638	130,425	-213	-0.2%
Roscommon	64,065	64,436	371	0.6%
Sligo	65,393	65,357	-36	-0.1%
Western Region	820,880	828,124	7,244	0.9%
State	4,588,252	4,757,976	169,724	3.7%
Rest of State	3,767,372	3,929,852	162,480	4.3%

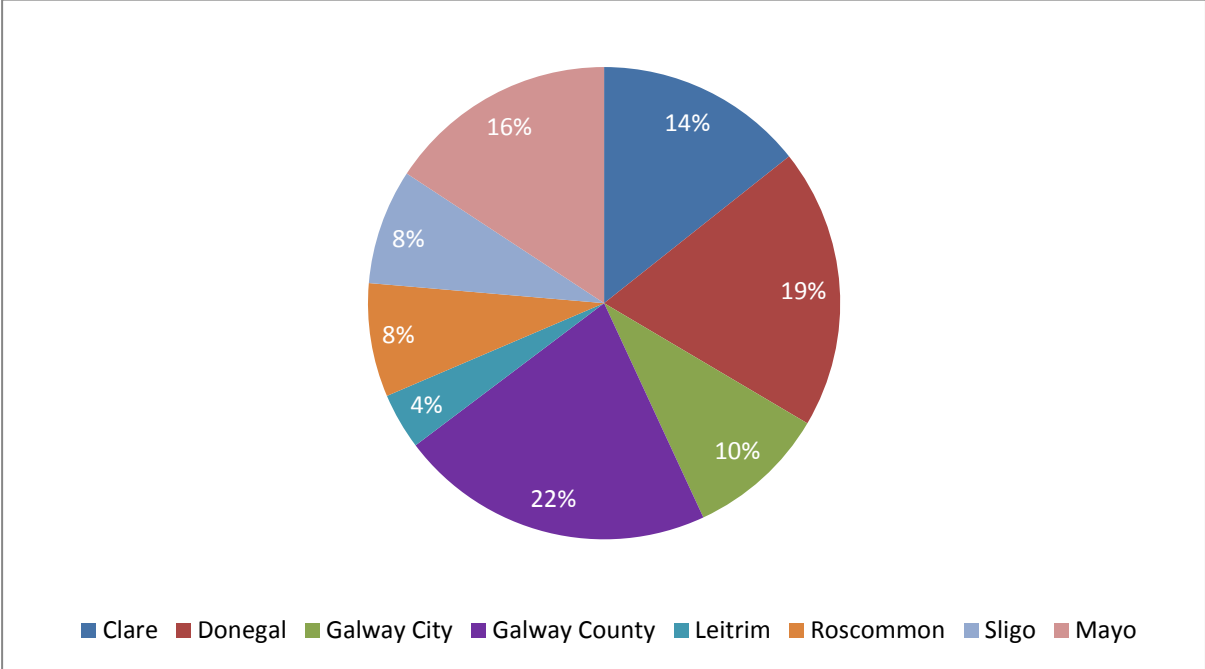
Source: CSO, Census of Population 2016: Preliminary Results, Table 1

The increase in population in Galway City and County together (7,899) is greater than the actual increase in the Western Region as a whole.

The share of population among the Western Region counties is shown in Fig. 1 below.

¹ Rest of state refers to all the counties in the state except for the seven counties of the Western Region.

Fig. 1: Composition of population of the Western Region, 2016

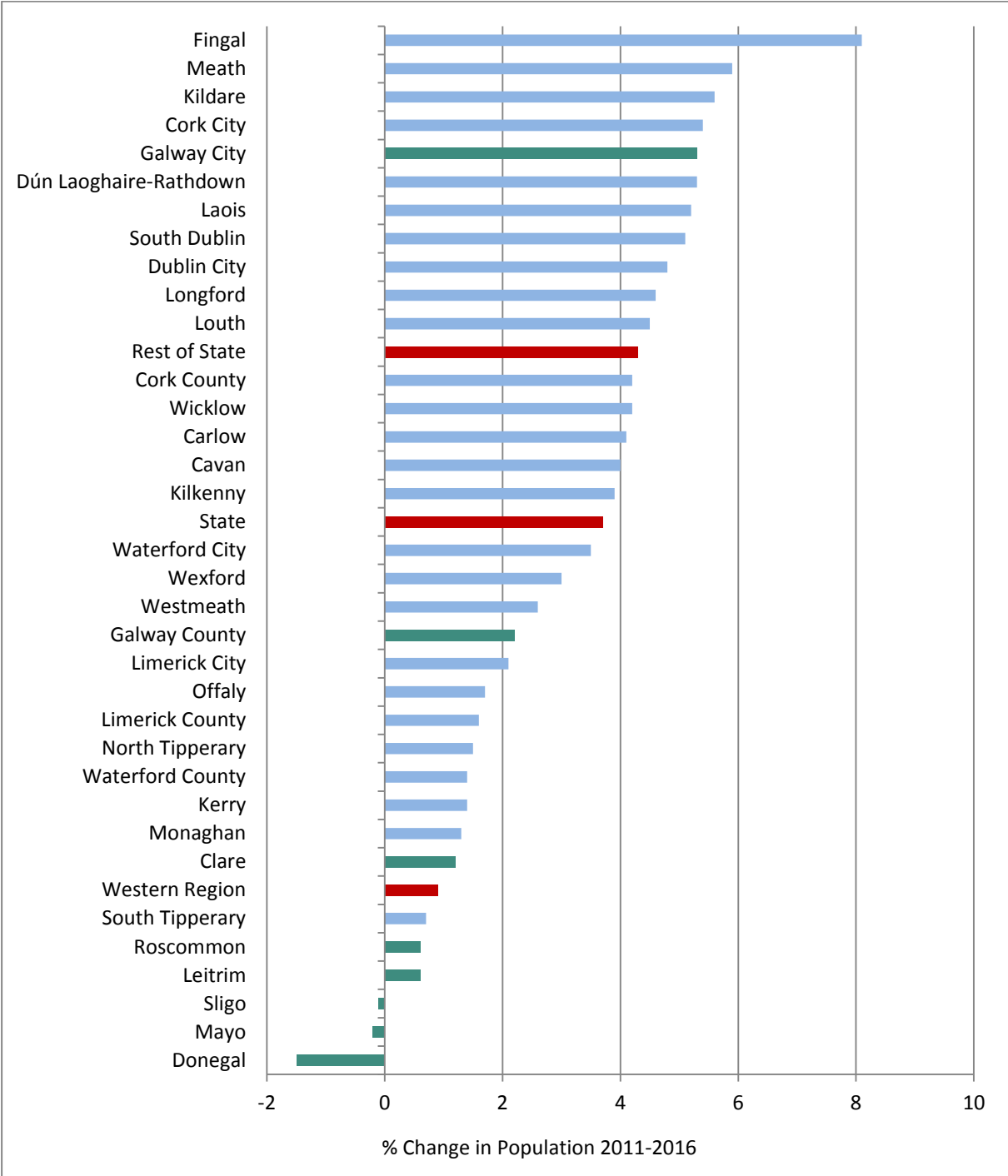


Source: CSO, Census of Population 2016: Preliminary Results, Table 1

Fig. 2 below shows population growth in all the administrative areas in the state. The Western Region counties are each marked in green, while the state, Western Region and the rest of state are in red. Fingal, Meath and Kildare had the highest percentage growth rates in the state, while five of the seven Western Region counties had the lowest growth rates or experienced population decline.

Of all the cities in the state, Cork city had the highest population growth, with both Galway city and Dublin city having the next highest percentage increase. Unlike the previous intercensal period, all cities experienced population growth.

Fig. 2: Percentage change in population in each administrative area, 2011-2016



Source: CSO, Census of Population 2011: Preliminary Results, Table 1

The percentage population change (as shown in Fig. 2) is influenced by the size of each area’s population. Therefore Table 2 sets out the population of each administrative area and the actual and percentage change since the last Census (in descending order of its percentage population change). Dublin City, Fingal and Cork City had the largest actual population increases in the state over the period.

Table 2: Population, actual and percentage change in population in all administrative areas in the state, 2011-2016

	Population 2016 (No.)	Actual Change in Population (2011-2016) (No.)	Percentage Change in Population (2011-2016) (%)
Fingal	296,214	22,223	8.1
Meath	194,942	10,807	5.9
Kildare	222,130	11,818	5.6
Cork City	125,622	6,392	5.4
Dún Laoghaire-Rathdown	217,274	11,013	5.3
Galway City	79,504	3,975	5.3
Laois	84,732	4,173	5.2
South Dublin	278,749	13,544	5.1
Dublin City	553,165	25,553	4.8
Longford	40,810	1,810	4.6
Louth	128,375	5,478	4.5
Wicklow	142,332	5,692	4.2
Cork County	416,574	16,772	4.2
Carlow	56,875	2,263	4.1
Cavan	76,092	2,909	4
Kilkenny	99,118	3,699	3.9
Waterford City	48,369	1,637	3.5
Wexford	149,605	4,285	3
Westmeath	88,396	2,232	2.6
Galway County	179,048	3,924	2.2
Limerick City	58,319	1,213	2.1
Offaly	78,003	1,316	1.7
Limerick County	136,856	2,153	1.6
North Tipperary	71,370	1,048	1.5
Kerry	147,554	2,052	1.4
Waterford County	68,032	969	1.4
Monaghan	61,273	790	1.3
Clare	118,627	1,431	1.2
South Tipperary	89,071	639	0.7
Leitrim	31,972	174	0.6
Roscommon	64,436	371	0.6
Sligo	65,357	-36	-0.1
Mayo	130,425	-213	-0.2
Donegal	158,755	-2,382	-1.5

Source: CSO, Census of Population 2016: Preliminary Results, Table 1

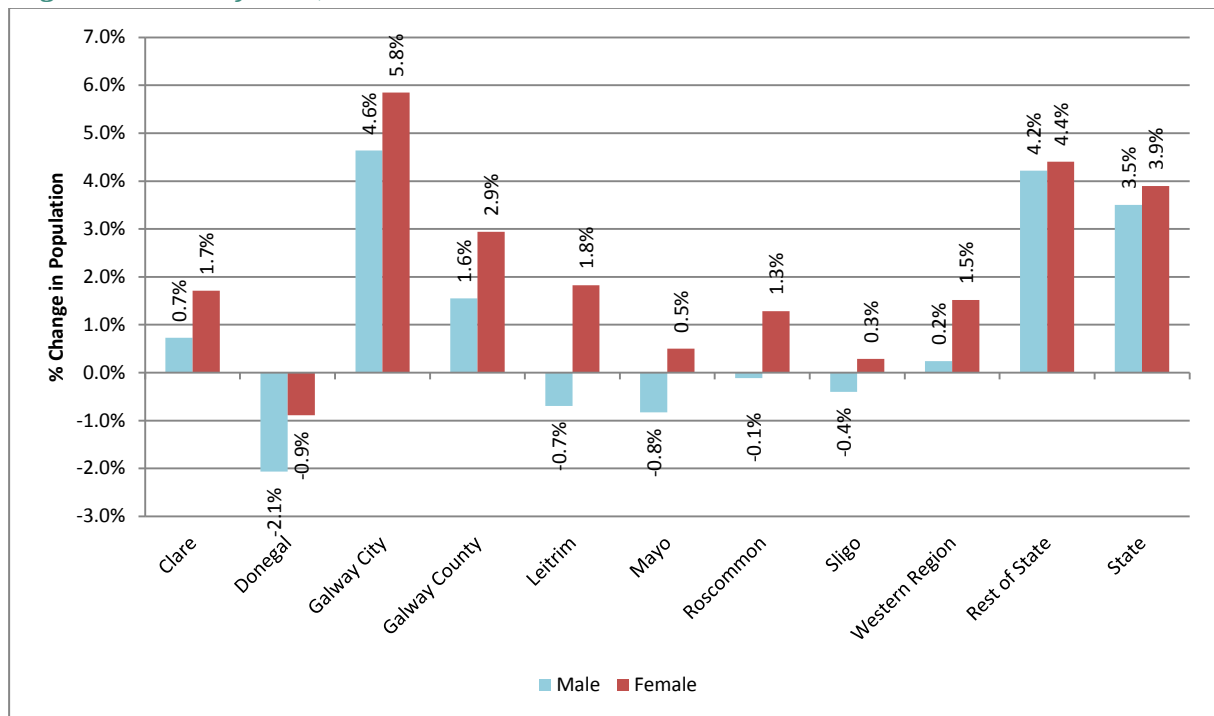
2.2 Was there a difference in population growth by gender?

The difference in population growth rates for males and females was quite pronounced in the 2011-2016 period. In all counties (and in the Western Region, and the State) there was higher growth in the female population than the male population. In the Western Region there was a 1.5% increase in the female population and 0.2% in the male population. For the rest of the state the difference was

not so pronounced (males 4.2%; females 4.4%).

This pattern is also true for all western counties. The male population fell in Leitrim (-0.7%), Mayo (-0.8%), Roscommon (-0.1%), Sligo (-0.4%) and Donegal had the largest decline in the number of males (-2.1%). This difference was due to the pattern of migration, given that natural increase is relatively similar for the two sexes (see section 3.3.1). Donegal was the only county in the state that had a decline in the female population also (-0.9%), while five counties, all in the Western Region had declines in the male population.

Fig. 3: Percentage change in male and female population in western counties, Western Region and rest of state, 2011-2016

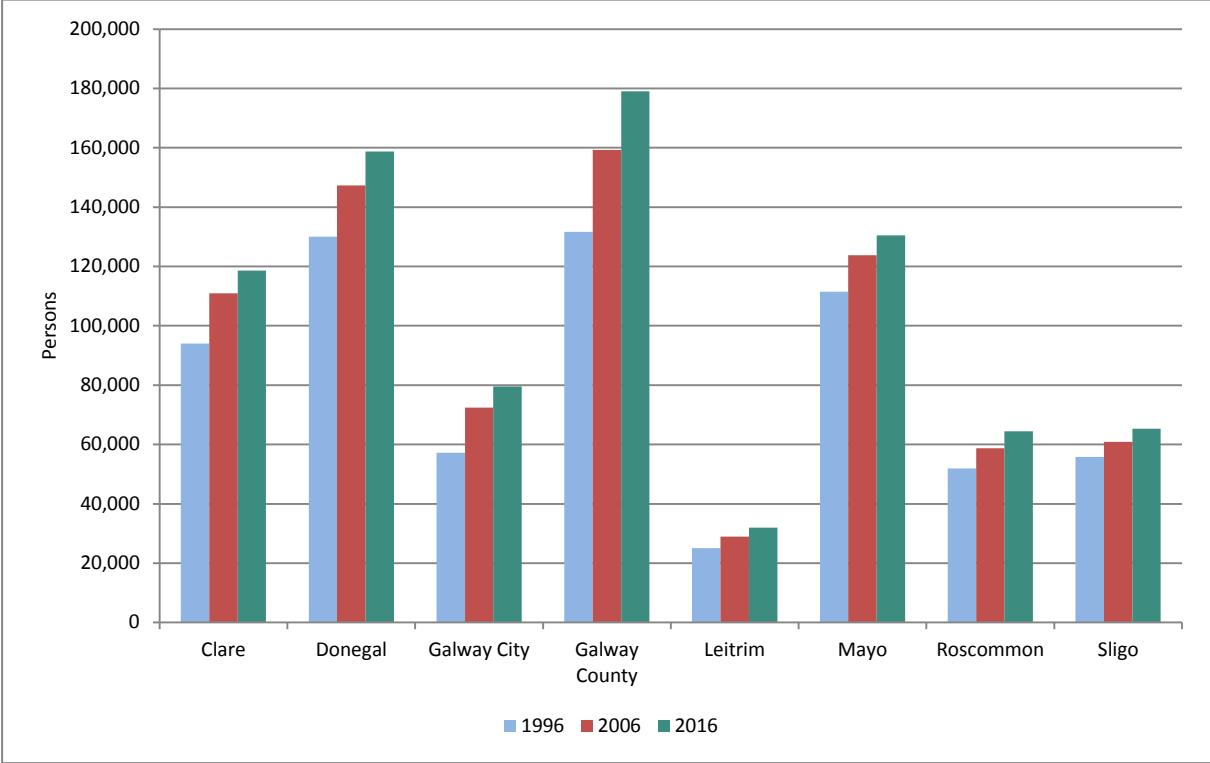


Source: CSO, Census of Population 2016: Preliminary Results, Table 1

2.3 How does the population in 2016 compare with previous periods?

The population of each western county has increased in the previous two censuses but preliminary results for 2016 show that three of the western counties had a decline, which is a striking change to the trend of population growth in the last decades. Taking this longer term view it is useful to look at changes in population over the last two decades looking at 1996, before the ‘Celtic Tiger’ growth in population, 2006 which coincided with the first phase of the ‘Celtic Tiger’ economic boom, and the decade to 2016 which included several years of growth peaking of that boom (2006-early 2008) followed by the recession. Despite the slowdown in population growth (and decline in three counties in the most recent intercensal period (2011-2016)) the growth in population in all counties since 1996 is evident (Fig. 4).

Fig. 4: Population of western counties, 1996, 2006, 2016

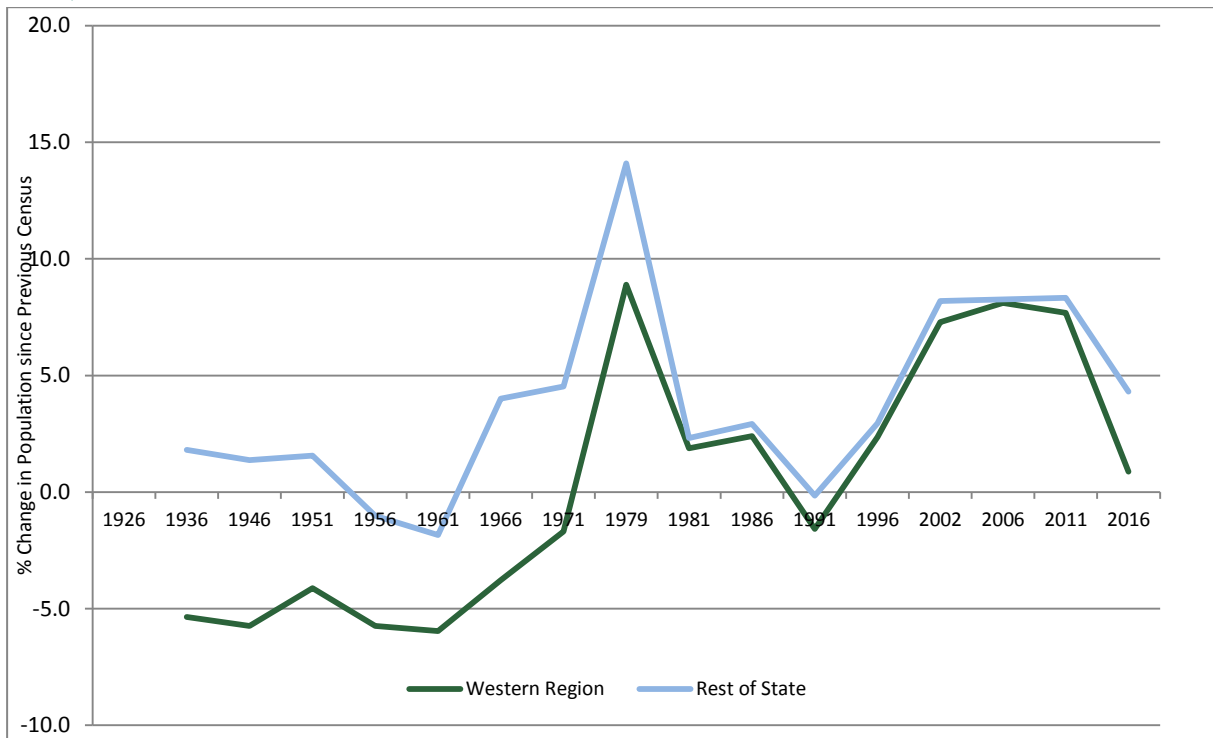


Source: CSO, Census of Population 2016: Preliminary Results, Table 1

The population growth in Galway County in the last two decades (since 1996) is particularly noticeable (from 131,613 to 179,048 an increase of 15%), while Galway city (12%), Leitrim (12%) and Roscommon (11%) all showed very significant increases. The population of Donegal increased by 9% in that period, Clare and Sligo populations both increased by 8% and Mayo had the lowest growth over the twenty year period (6%).

Over the longer term, the Western Region experienced rates of population change between censuses which were considerably below those in the rest of the state from 1936 to 1981 (Fig. 5). In each intercensal period from 1936 to 1951 the Western Region experienced population decline while the rest of the state had population growth. At that point (1951-1956) the rest of the state also lost population. Then again during 1961-1971 the region had population decline while the rest of the state had population growth.

Fig. 5: Percentage change in population since previous Census in Western Region and rest of state, 1936-2016

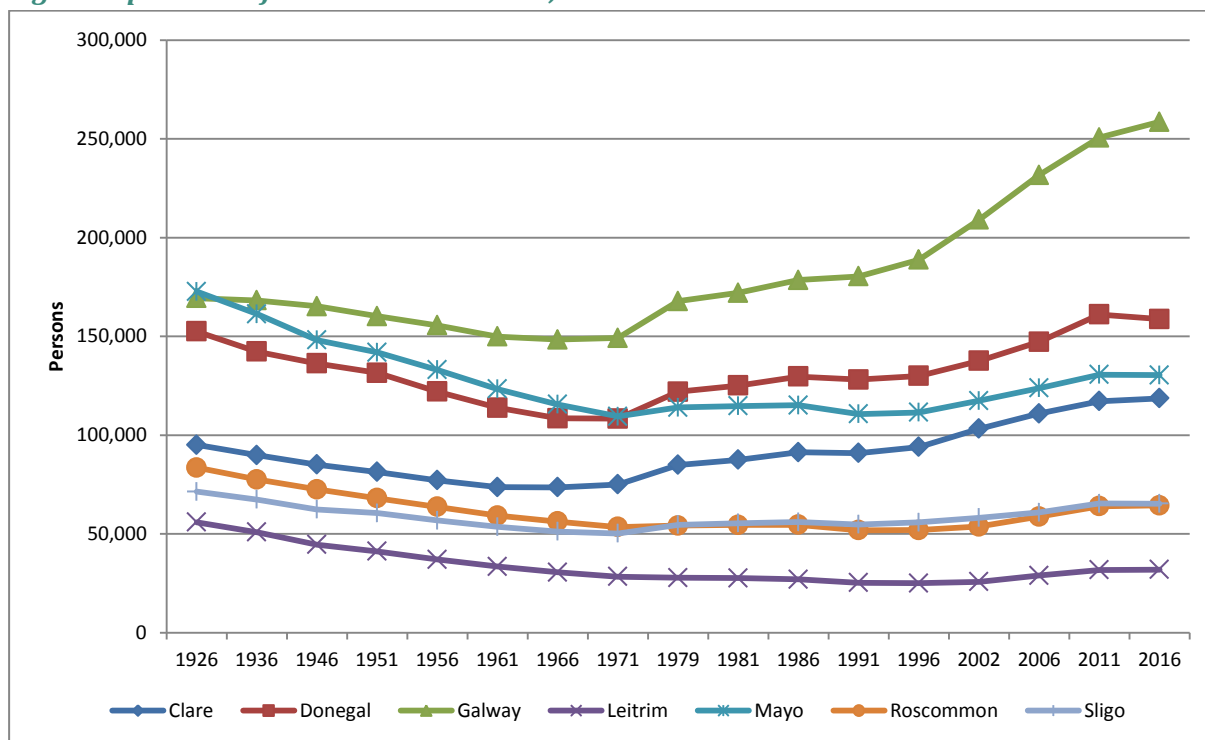


Source: CSO, Census of Population 2016: Preliminary Results, and Census of Population 2011: Preliminary results Table 2A

Since 1981 population growth rates in the Western Region have remained below those in the rest of the state but the gap has narrowed considerably. It widened slightly between 2002-2006 and 2006-2011, but this divergence was most significant in 2016.

Considering individual counties over this period, there was a fairly consistent decline in the population of the western counties in each Census between 1926 and 1971 (Fig. 6). Since then there has been some variation in how individual counties have performed.

Fig. 6: Population of the western counties, 1926-2016



Source: CSO, *Census of Population 2016: Preliminary Results*, and *Census of Population 2011: Preliminary results Table 2A*

Galway (city plus county) has experienced population growth in each intercensal period since 1971. Leitrim on the other hand experienced population decline in each period until 2002. All of the other counties of the region, as well as the Western Region as a whole, experienced population growth since 1971 with the exception of the 1986-1991 period when there was a drop in population. Donegal, Mayo and Sligo have all experienced a decline between 2011 and 2016.

2.4 How did population change at a sub-county level?

The preliminary Census results also contain population data at the electoral division (ED) level. There are almost one thousand EDs in the Western Region and it is not possible to examine these data in great detail in this report so an overview is provided here.

Of the 983 EDs in the region, 433 of them experienced population growth between 2011 and 2016 and 533 EDs experienced population decline (17 showed no population change).

Of those that experienced population growth, 180 had population growth greater than 5% and 66 had growth of over 10%. In contrast, 262 EDs had a population decline of more than 5% and of these 82 had a population decline of more than 10%.

In terms of the actual increase in their population the ten EDs in the Western Region with the greatest population growth are shown in Table 3 below. In general it can be seen that many of the EDs with the strongest population growth are on the edges or within easy commuting distance to the larger urban centres in the region.

It should be noted that as actual population increase is being considered, these are often among the largest EDs in the region. Where percentage population increase in the Western Region is considered (see Map 1) it is often the smallest EDs which show the largest percentage increase.

These are usually in the most rural EDs where populations are sparse and the population of the ED is so small that a change of only a few persons will show as a large percentage rise.

Table 3: Ten EDs in the Western Region showing the highest actual population increase in Census 2016 (preliminary results).

Electoral Division (ED)	Population 2016	Actual Population Increase (2011-2016)	Percentage Population Increase (2011-2016)
003 Bearnna, Galway City	15,199	815	5.7
001 Ballybaan, Galway City	13,053	755	6.1
018 Paróiste San Nicoláis, Galway City	3,265	667	25.7
101 Athenry, Co. Galway	5,469	641	13.3
215 Tuam Rural, Co. Galway	6,033	513	9.3
001 Athlone West Rural, Co. Roscommon	4,960	510	11.5
021 Taylors Hill, Galway City	2,960	503	20.5
089 Claremorris, Co. Mayo	4,487	500	12.5
128 Loughrea Urban, Co. Galway	5,542	480	9.5
006 Dangan, Galway City	4,130	444	12.0

Source: CSO, 2016, Census of Population, Preliminary Results EP008

In contrast, Table 4 below shows the ten EDs in the Western Region which have had the largest actual population decrease and while the largest population increases were in and close to urban areas, the places with the largest actual population decreases are among the most rural in the Western Region.

Table 4: Ten EDs in the Western Region showing the highest actual population decrease in Census 2016 (preliminary results).

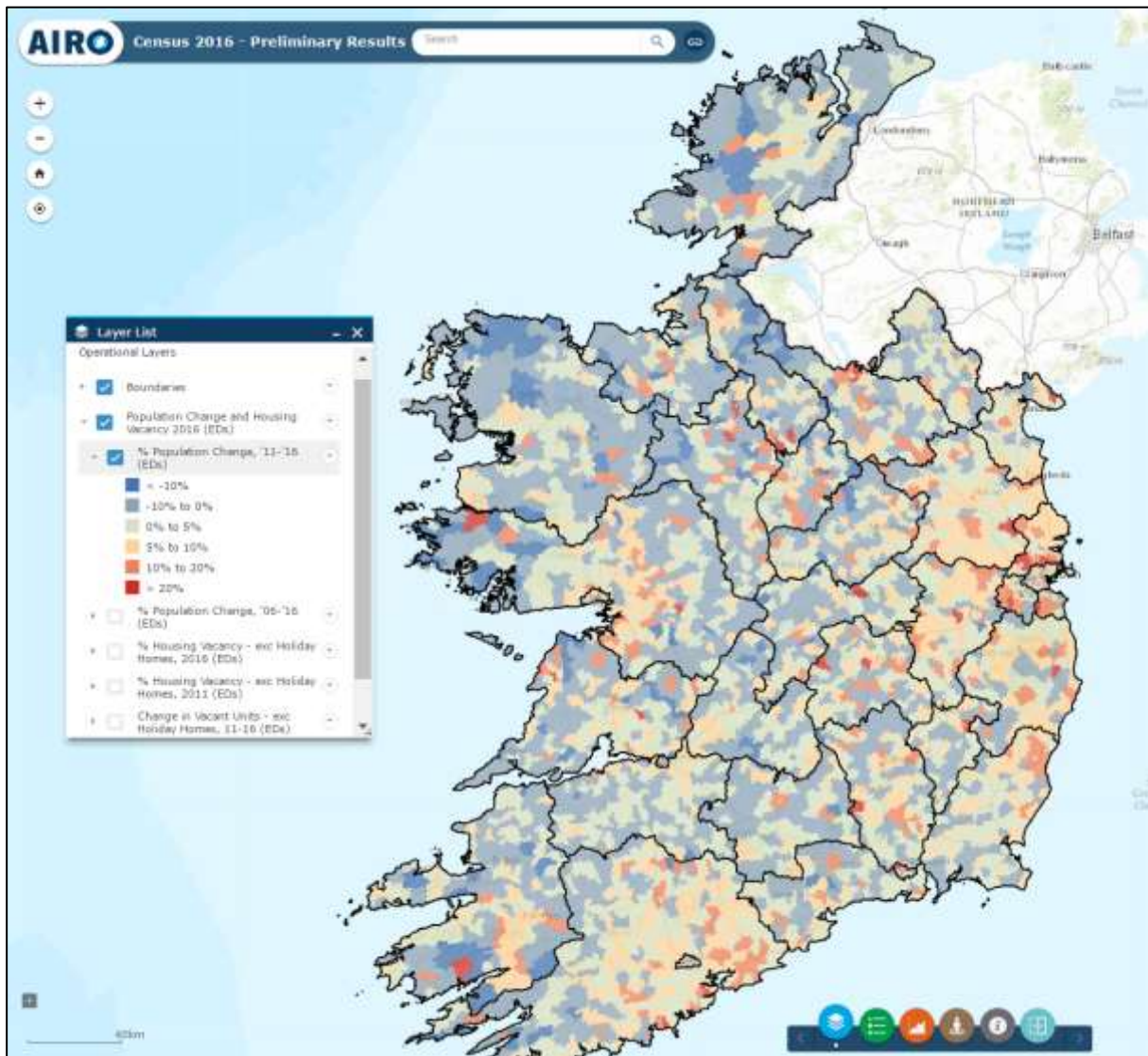
Electoral Division (ED)	Population 2016	Actual Population Decline (2011-2016)	Percentage Population Decline (2011-2016)
064 Inis Mhic an Doirn, Co. Donegal	1,431	-151	-9.5
039 Anagaire, Co. Donegal	2,197	-157	-6.7
070 Burt, Co. Donegal	1,259	-163	-11.5
021 Ballynakill, Co. Galway	425	-168	-28.3
022 Wellpark, Galway City	1,655	-188	-10.2
107 Cappavilla, Co. Clare	847	-191	-18.4
032 Na Croisbhealaí, Co. Donegal	1,952	-197	-9.2
002 Sligo North, Co. Sligo	5,168	-334	-6.1
007 Eyre Square, Galway City	4,102	-359	-8.0
025 Clifden, Co. Galway	2,145	-468	-17.9

Source: CSO, 2016, Census of Population, Preliminary Results EP008

While the two tables above show the largest increases and decreases in the population of EDs, Map 1 shows the percentage change in the population of the EDs. The areas showing the strongest pattern

of decline and low growth are concentrated in the Western Region and down the western seaboard while the areas of highest growth are concentrated in the east of the state.

Map 1: Percentage change in the population of Electoral Divisions, 2006-2011



Source: All-Island Research Observatory <http://airomaps.nuim.ie/id/Census2016/> based on CSO, 2016, Census of Population 2016: Preliminary Results

3.0 Components of Population Change

Population change is driven by two factors:

1. **Natural Increase:** the difference between the number of births and deaths.
2. **Net Migration:** the difference between the number of people who move into an area and the number who move out. This results from both 'internal migration' (movements within the country) and 'external migration' (movements into and out of the country). The preliminary results do not distinguish between internal and external migration but the full Census results will.

Population change within any given area results from the combination of both these factors, either of which can lead to population increase or decrease.

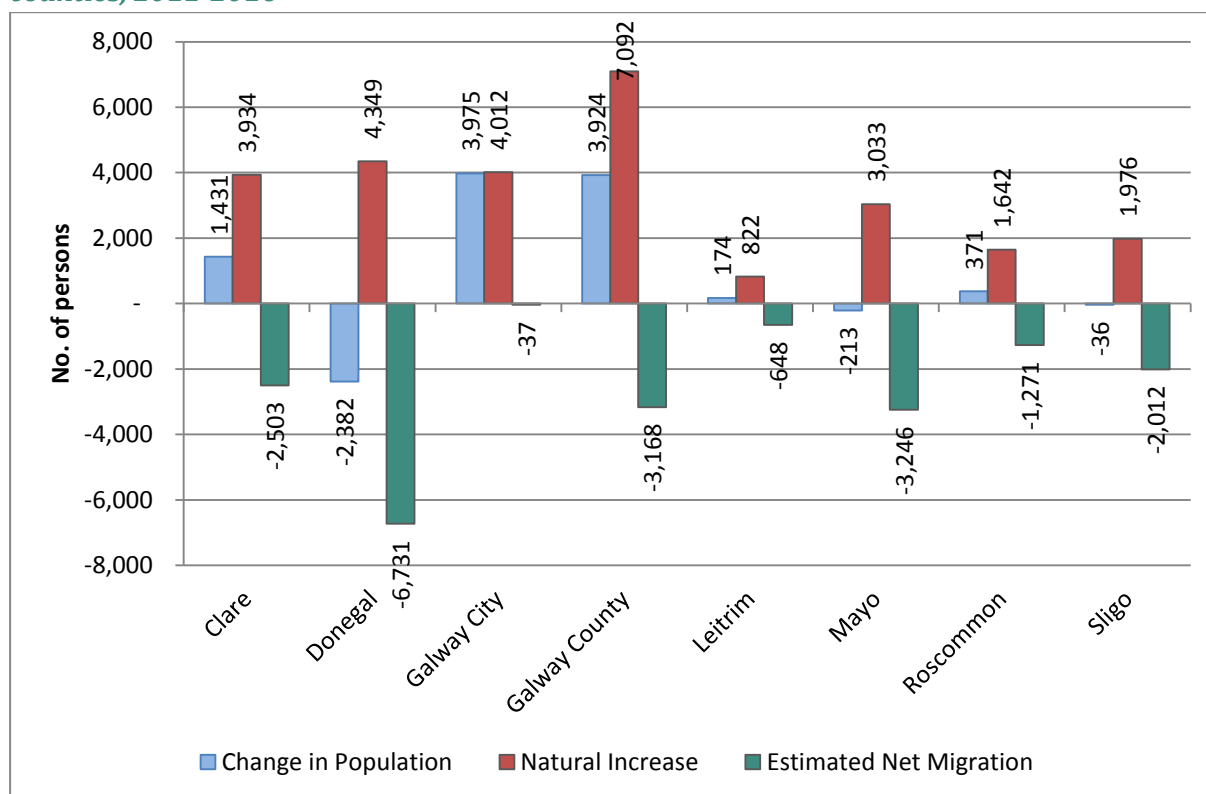
3.1 What caused population change in western counties during 2011-2016?

As noted above, Donegal, Sligo and Mayo were the only counties in Ireland which had an overall decline in their population. From Fig. 7 we can see that all three had a natural increase in their population over the 2011-2016 period, with more births than deaths. All other western counties, and indeed all counties nationally, also had positive natural increase.

All western counties had negative net migration, more people moved out of the county (to another Irish county or outside the country) than moved into the county. This was the common pattern across Ireland with only Fingal, Dún Laoghaire-Rathdown, Dublin city, Cork city, Kilkenny, Laois and Longford having positive migration.

In the case of Donegal, Mayo and Sligo, the population loss caused by migration cancelled out their gains from natural increase. In particular Donegal experienced very substantial population loss due to migration. In contrast Galway city only had a very marginal loss of population through migration.

Fig. 7: Population change, estimated net migration and natural increase in western counties, 2011-2016



Source: CSO (2016), Preliminary Census Results, Table EP005

<http://www.cso.ie/px/pxeirestat/Statire/SelectVarVal/Define.asp?maintable=EP005&PLanguage=0>

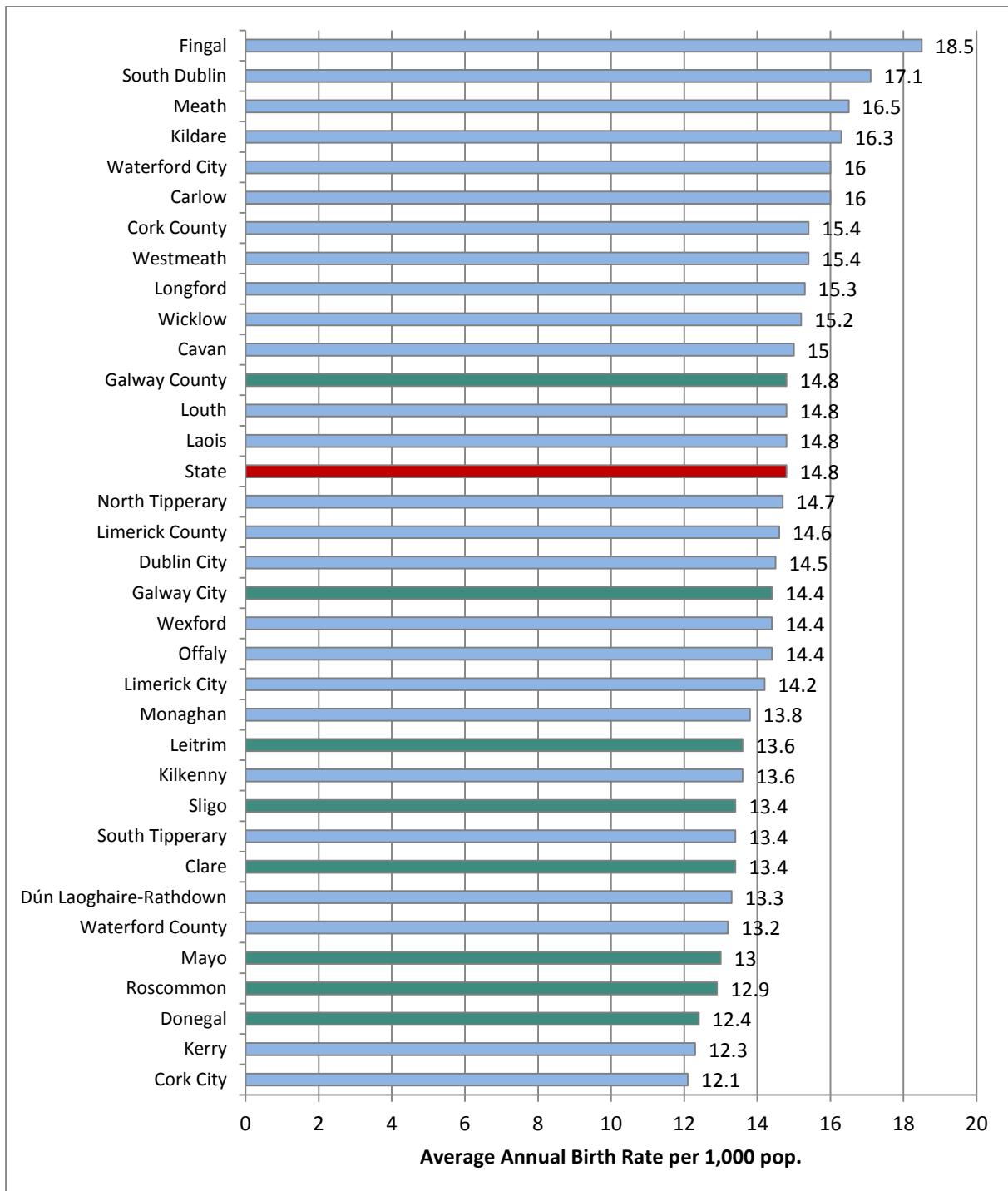
3.2 Natural Increase

Natural increase is the difference between the number of births and deaths. Therefore the extent of natural increase depends on the birth and death rates in an area.

3.2.1 What were the birth rates by county during 2011-2016?

All western counties, except for Galway County, had average annual birth rates below the state average between 2011 and 2016 (Fig. 8). Donegal, Roscommon and Mayo had among the lowest annual birth rates nationally at fewer than 13 births per 1,000 population each year, compared with 17.1 and 18.5 in South Dublin and Fingal.

Fig. 8: Average annual birth rates per 1,000 population in all administrative areas, 2011-2016



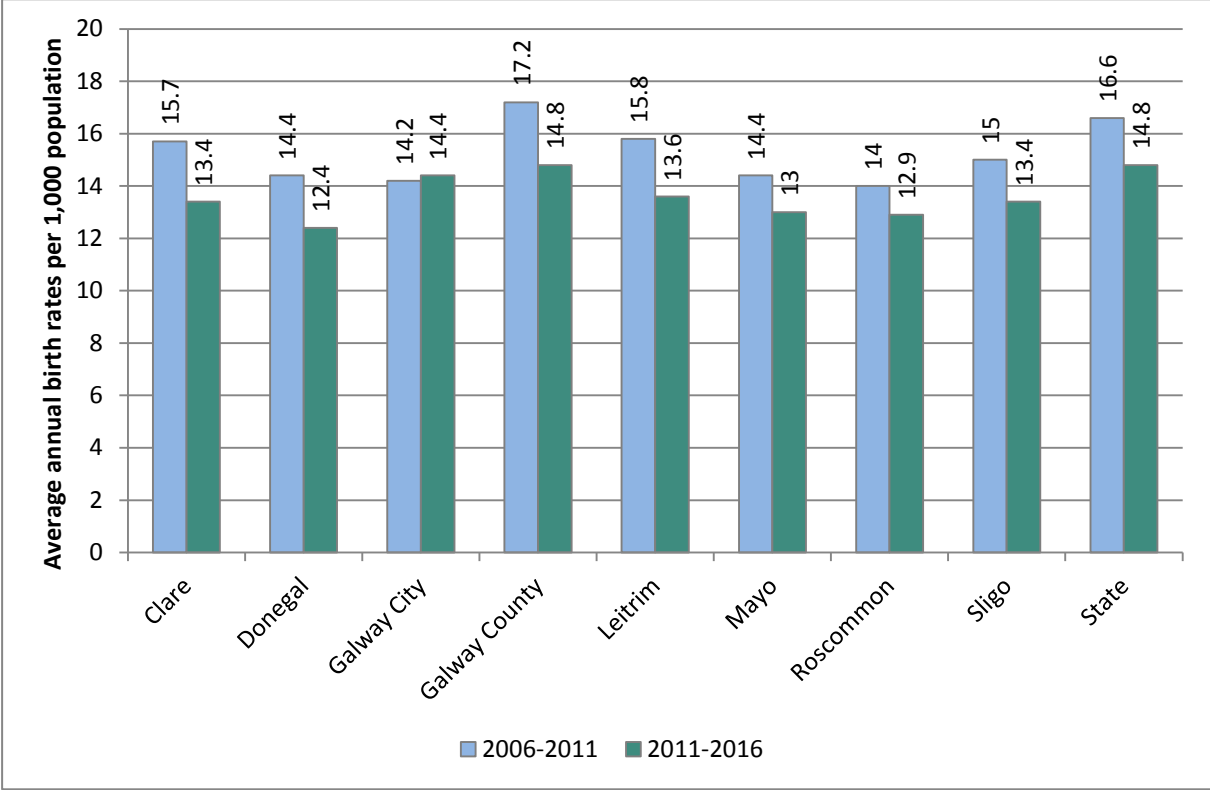
Source: CSO (2016), Preliminary Census Results, Table EP005

<http://www.cso.ie/px/pxeirestat/Statire/SelectVarVal/Define.asp?maintable=EP005&PLanguage=0>

All of the western counties, except Galway city, had a decline in average annual birth rates between the two intercensal periods of 2006-2011 and 2011-2016 (Fig. 9). Though again it should be noted that the 2016 figures are preliminary. We can see that even though Galway county continues to have the highest birth rate in the region, there was a quite substantial fall from 17.2 down to 14.8 between the two periods, a fall of 14%. Among the western counties Clare had the biggest decline,

down 14.6%, while both Leitrim and Donegal had falls of 13.9%. The average annual birth rate in these four counties declined by more than the state average (10.8%).

Fig. 9: Average annual birth rates per 1,000 population in western counties, 2006-2011 and 2011-2016



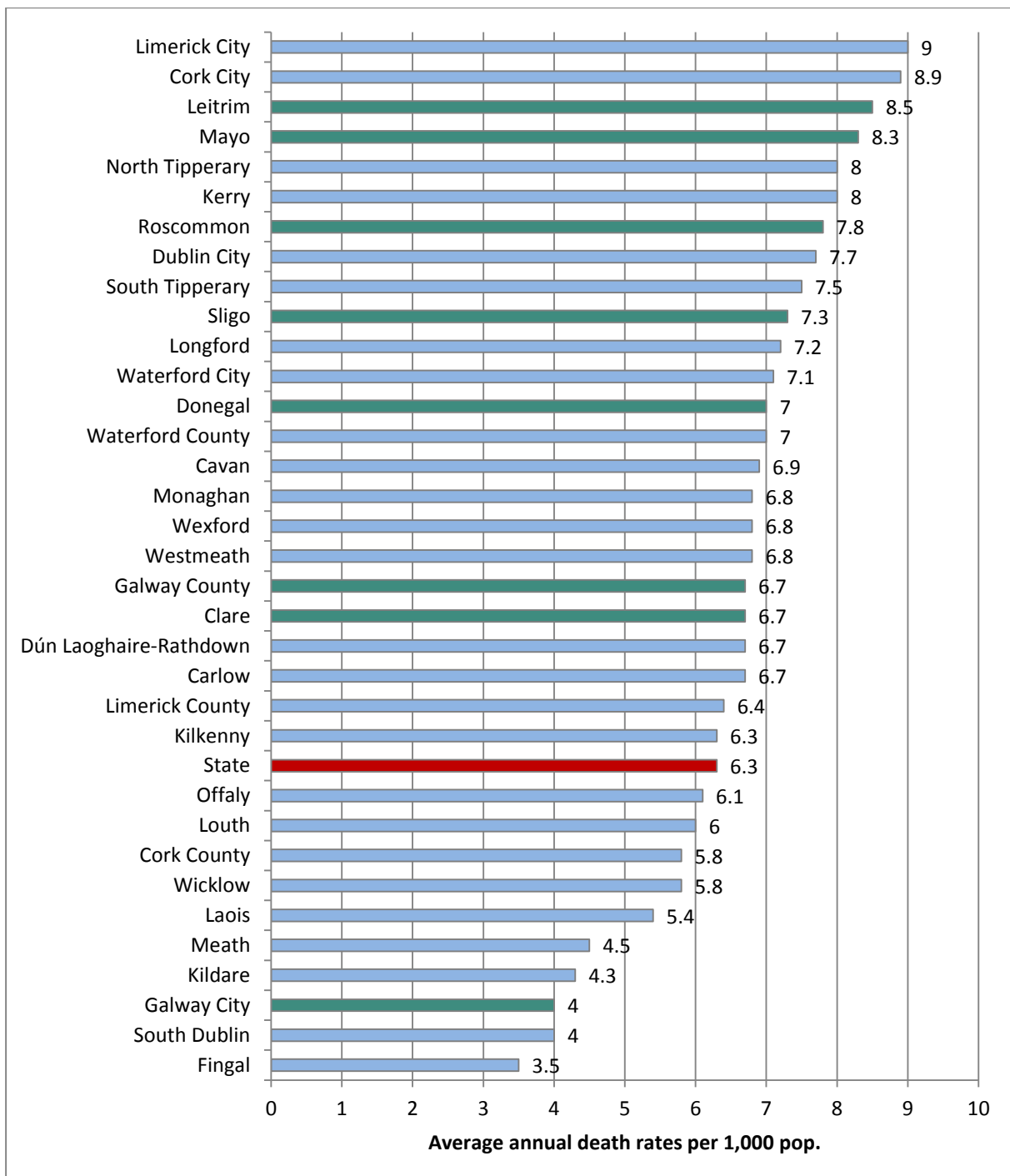
Source: CSO (2016), Preliminary Census Results, Table EP005
<http://www.cso.ie/px/pxeirestat/Statire/SelectVarVal/Define.asp?maintable=EP005&PLanguage=0>

3.2.2 What were the death rates by county during 2011-2016?

The other aspect of natural increase is death rates. A quite different pattern emerges here (Fig. 10). Except for Galway city, all western counties have higher average death rates than the state average. We can see that Galway city is quite unique among Irish cities in having such a low death rate at 4 per 1,000 population. Limerick city and Cork city have the highest rates nationally at more than double that. City centres are often characterised by an older age profile. Among Irish cities Galway clearly has a uniquely young age profile.

The pattern in general is that, in addition to city centres, it is the most rural counties which have the highest death rates. For example Leitrim and Mayo have the third and fourth highest nationally. This, combined with lower birth rates, means that in more rural counties the positive impact of natural increase is reduced. An older age profile means there are fewer in the child bearing age groups and a greater share in the older age groups, increasing death rates and lowering birth rates. This has clear implications for age dependency ratios.

Fig. 10: Average annual death rates per 1,000 population in all administrative areas, 2011-2016



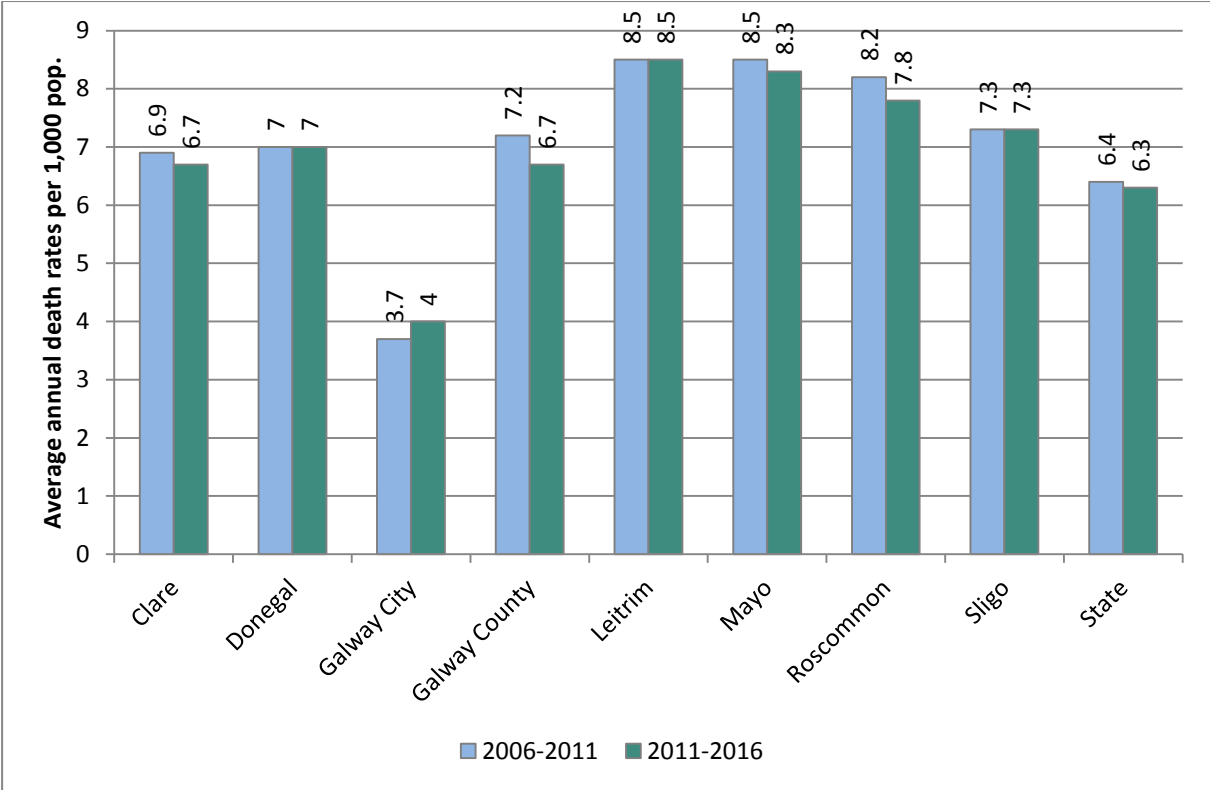
Source: CSO (2016), Preliminary Census Results, Table EP005

<http://www.cso.ie/px/pxeirestat/Statire/SelectVarVal/Define.asp?maintable=EP005&PLanguage=0>

Death rates change far more gradually over time than birth rates. The average annual death rates declined marginally or stayed the same in most western counties over the past decade (Fig. 11). Galway county and Roscommon were the counties which had the largest declines. Galway city has by far the lowest death rate, but was the only area to have a higher average death rate between 2011-2016 than in the previous intercensal period. Leitrim and Mayo continued to have the highest

average death rates in both periods.

Fig. 11: Average annual death rates per 1,000 population in western counties, 2006-2011 and 2011-2016

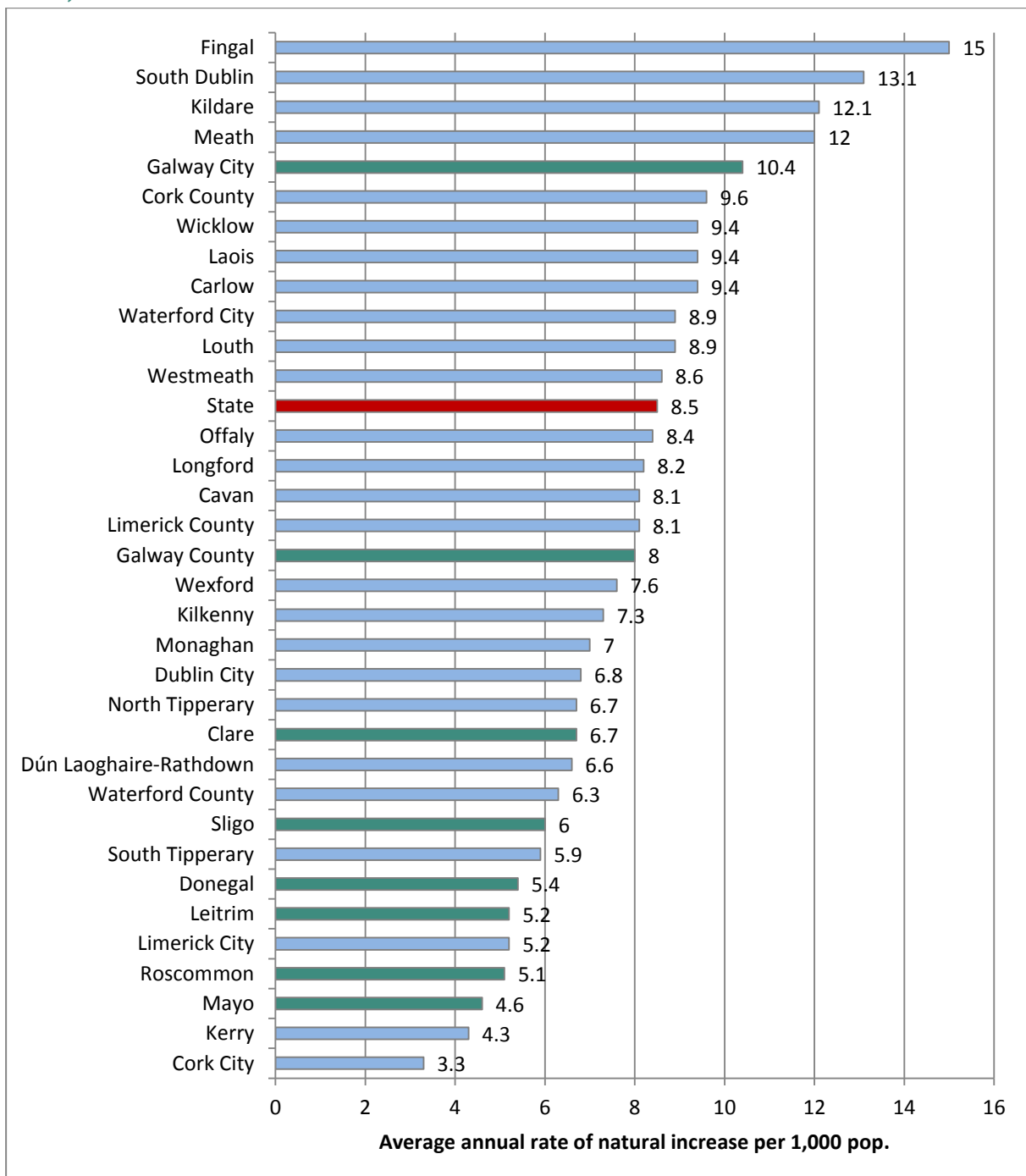


Source: CSO (2016), Preliminary Census Results, Table EP005
<http://www.cso.ie/px/pxeirestat/Statire/SelectVarVal/Define.asp?maintable=EP005&PLanguage=0>

3.2.3 What was the rate of natural increase by county during 2011-2016?

Low birth rates and high death rates result in the most rural counties having low annual rates of natural increase (Fig. 12). Mayo, Roscommon, Leitrim and Donegal all had annual rates of natural increase of fewer than 6 persons per 1,000 population annually between 2011 and 2016. In contrast, in Galway city, natural increase added 10.4 persons for every 1,000 population annually during the period, the only area within the region above the state average. Fingal was a striking outlier in the data with a rate of natural increase of 15 persons per 1,000 population.

Fig. 12: Average annual rates of natural increase per 1,000 population in all administrative areas, 2011-2016



Source: CSO (2016), Preliminary Census Results, Table EP005

<http://www.cso.ie/px/pxeirestat/Statire/SelectVarVal/Define.asp?maintable=EP005&PLanguage=0>

3.3 Net Migration

The second source of population change is net migration – the difference between the number moving into an area and the number moving out. As noted above, all western counties and the vast majority of counties nationally,² had negative net migration between 2011 and 2016.

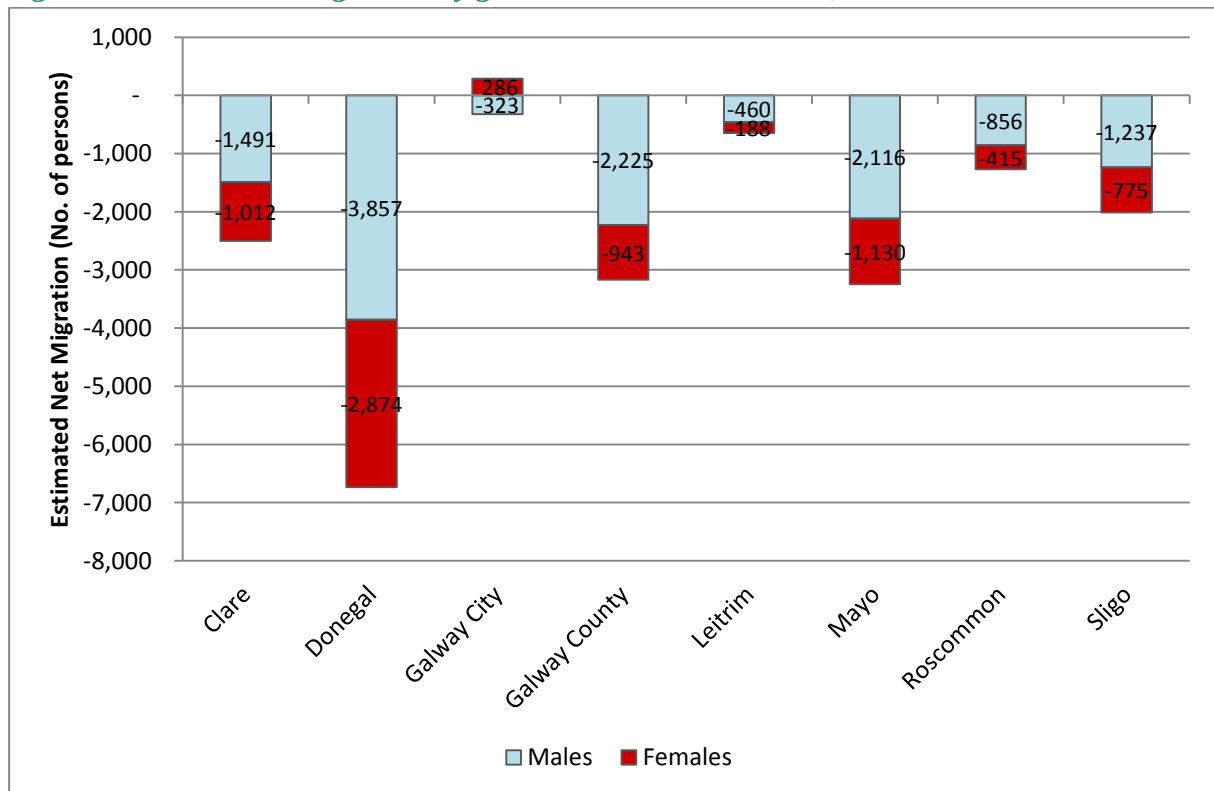
² Fingal, Dún Laoghaire-Rathdown, Dublin city, Cork city, Kilkenny, Laois and Longford had positive net migration.

3.3.1 What was the level of net migration by gender in western counties?

From Fig. 13 we can see that all counties experienced a far greater loss of men than women to migration. This is the reason for the lower male population growth noted in section 2.2. Indeed, females in Galway city was the only example of a population group in the Western Region which grew due to positive migration (greater number moving in than moving out) over the period (up by 286). In the case of Galway County and Leitrim, over 70% of their population loss due to migration, was male. The county (excluding Galway city) where population loss due to migration was most balanced between the sexes was Donegal where 57.3% was male.

The direct connection between job losses in construction and related traditional manufacturing sectors, highly male dominated, and the greater share of out-migration by men is clear. Only five administrative areas nationally had positive migration for men.³ On the other hand, 12 administrative areas nationally, including Galway city, had positive female net migration.

Fig. 13: Estimated net migration by gender in western counties, 2011-2016



Source: CSO (2016), Preliminary Census Results, Table EP005

<http://www.cso.ie/px/pxeirestat/Statire/SelectVarVal/Define.asp?maintable=EP005&PLanguage=0>

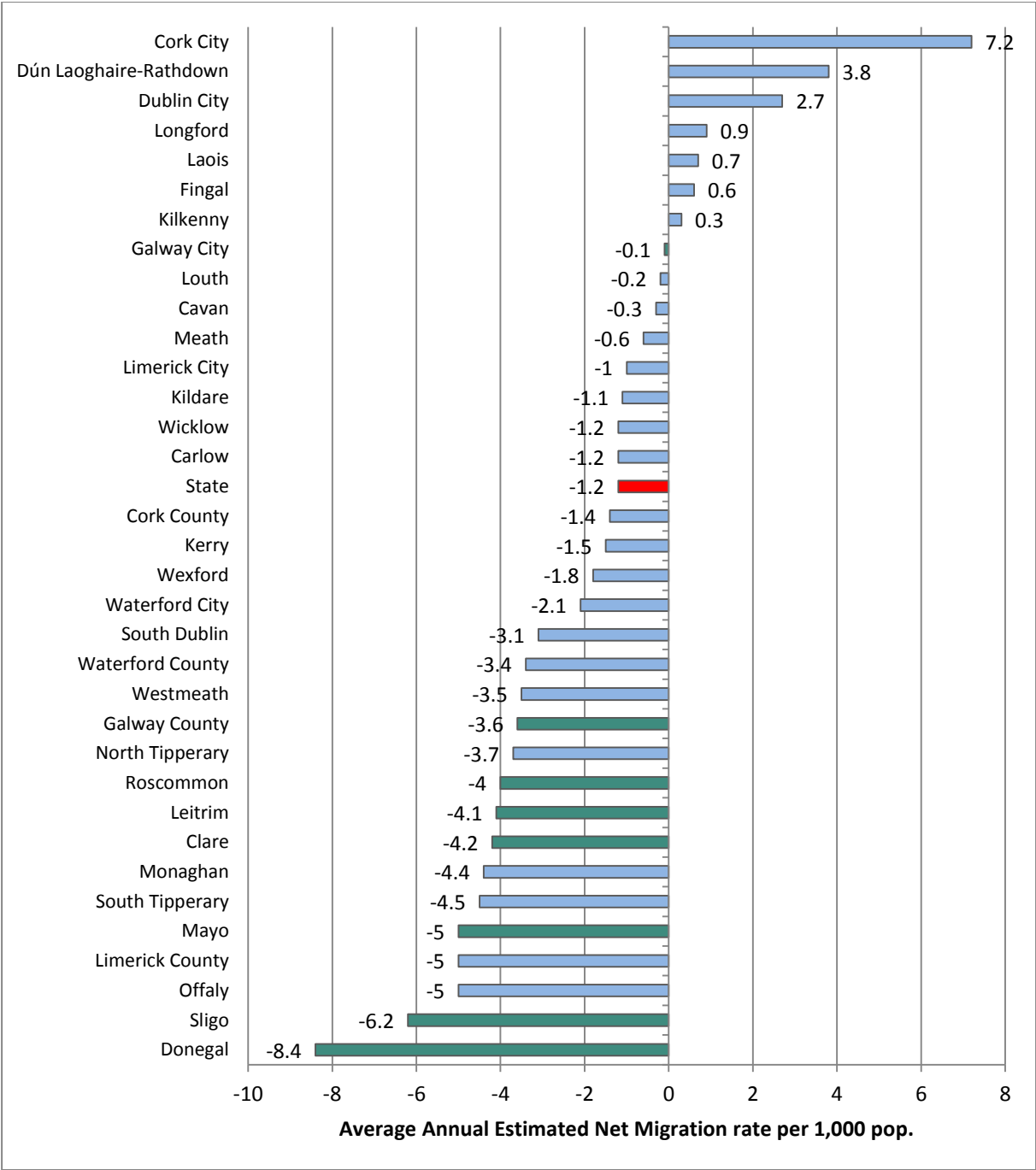
3.3.2 What were the net migration rates by county during 2011-2016?

The average annual estimated net migration rate per 1,000 of the population for every county in Ireland is set out in Fig. 14. This shows that on average, in each year between 2011 and 2016, for every 1,000 people living in Cork City, the number of people moving into Cork City exceeded the number moving out by 7.2 people. In county Donegal on the other hand, in each year between 2011 and 2016, for every 1,000 people living in the county, the number of people moving out exceeded the number moving in by 8.4 people. These two areas are at the extreme ends of the scale.

³ Dún Laoghaire-Rathdown, Dublin city, Cork city, Laois and Longford had positive net migration for males.

We can see that Sligo (-6.2) and Mayo (-5), the only other two counties in Ireland to experience population decline, had among the most negative migration rates nationally. While Offaly and Limerick County had similar rates of population loss from migration, their rates of natural increase were high enough to cancel this out and lead to overall population growth. With the exception of Galway city, all other western counties had negative net migration rates below the median and well below the state average.

Fig. 14: Average annual estimated net migration rate per 1,000 population in all administrative areas, 2011-2016



Source: CSO (2016), Preliminary Census Results, Table EP005
<http://www.cso.ie/px/pxeirestat/Statire/SelectVarVal/Define.asp?maintable=EP005&PLanguage=0>

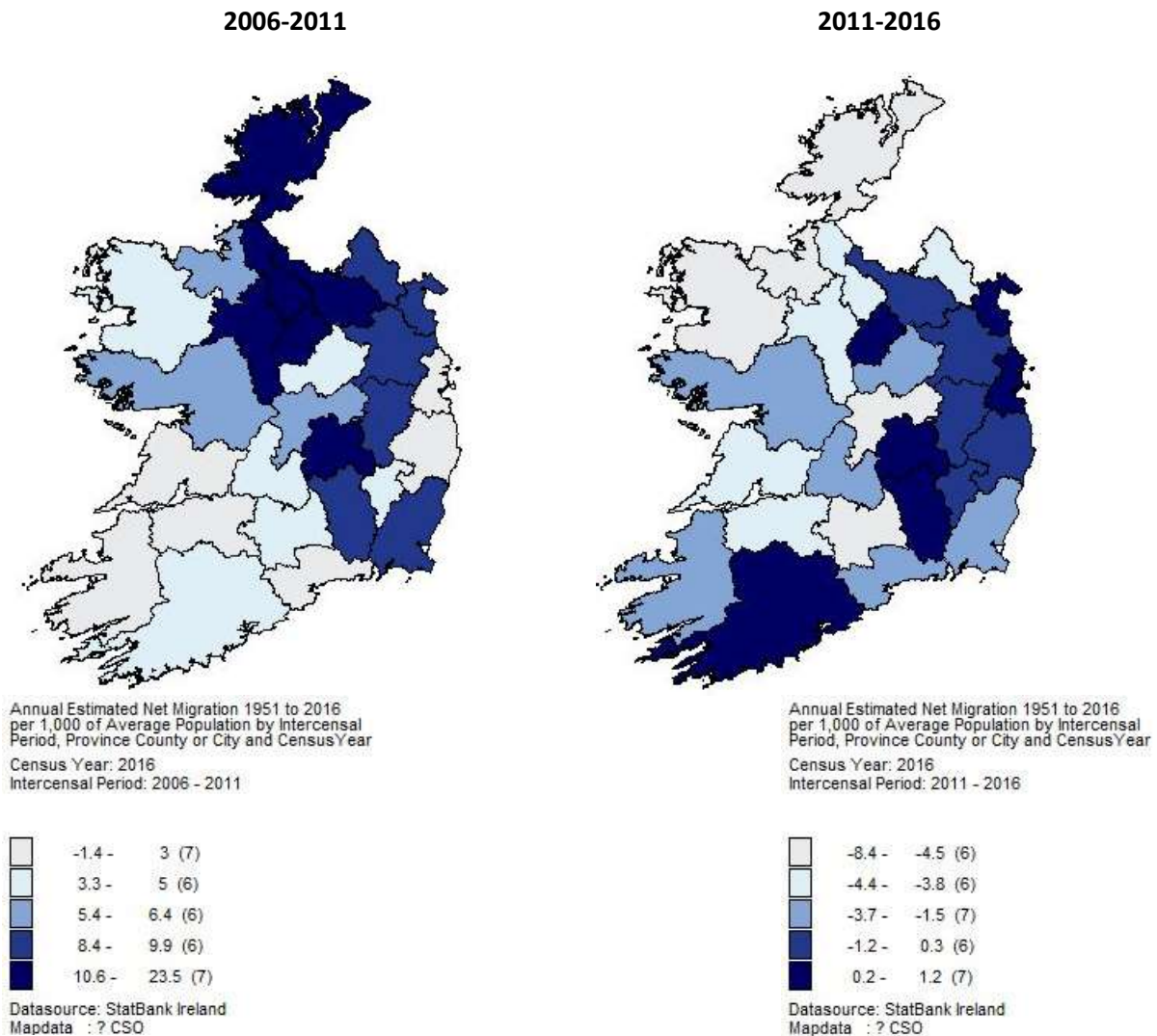
Map 2 shows two maps illustrating average annual estimated net migration rates for administrative counties in the two periods 2006-2011 and 2011-2016. It should be noted that the scale on each map is different, due to the very different migration patterns occurring during these periods, e.g. the darkest blue does not measure the same degree of net migration on both maps.⁴ However though the magnitude of the migration differs, the maps are useful to illustrate the spatial patterns.

The contrast is very stark. In the earlier period, Donegal, Leitrim and Roscommon were among the counties with the highest positive net migration rates, but by 2011-2016 they had among the highest negative migration rates. The four Dublin Local Authorities went from negative net migration rates, partly due to out-migration to surrounding counties, to positive net migration in the recent period. Indeed the map very clearly shows that Dublin and its extended commuter belt experienced positive net migration in the most recent period.

There was a pattern of positive migration in areas north of the Galway-Dublin line, as well as the more distant Dublin commuting counties, during 2006-2011. Positive net migration has now become more focused in the east coast and south-west.

⁴ In 2006-2011, the darkest blue areas experienced positive average annual net migration rates per 1,000 population in the range of 10.6–23.5. In contrast, in 2011-2016 the areas of darkest blue had rates of just 0.2-1.2.

Map 2: Average annual estimated net migration rates per 1,000 population, 2006-2011 and 2011-2016



3.3.3 What were net migration rates since 1951?

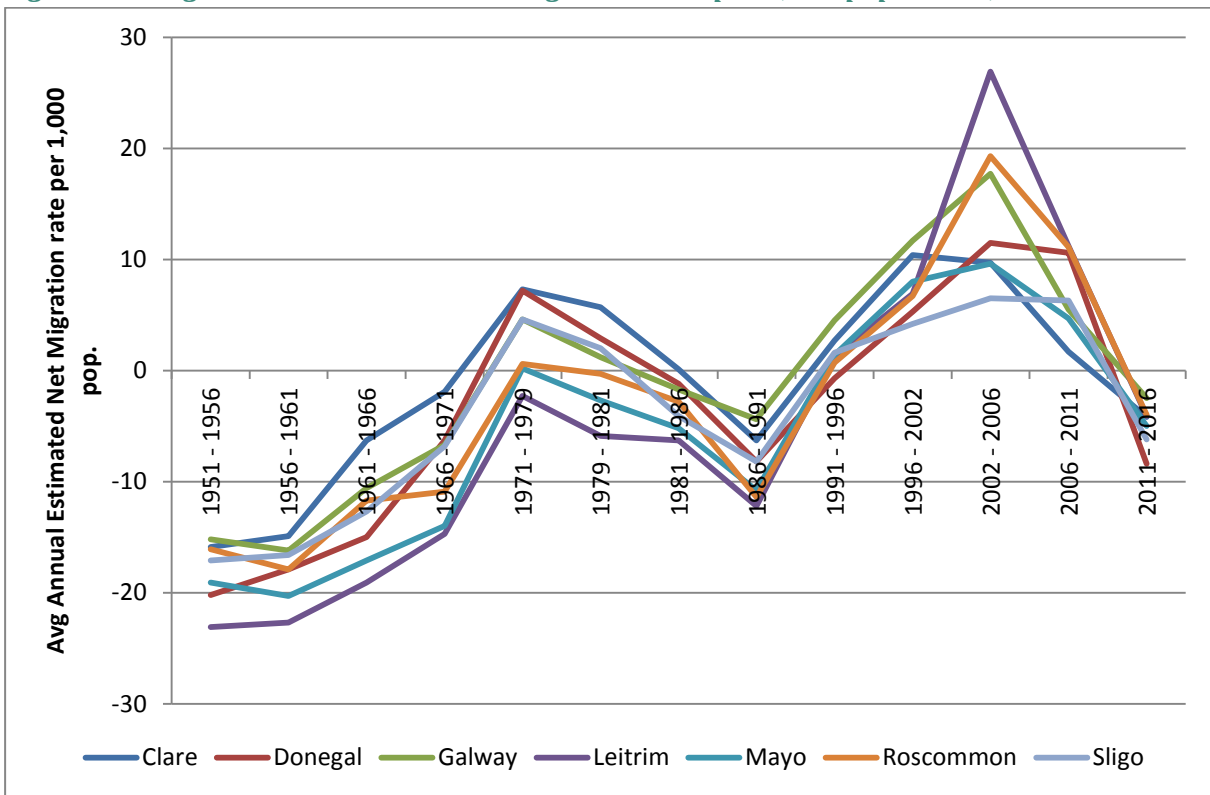
When examining migration, it is useful to take a longer term perspective. Fig. 15 shows average rates of net migration in each intercensal period since 1951. A very clear trend can be seen across all western counties. All experienced negative migration between 1951 and 1971. During the 1970s all western counties except Leitrim moved into positive migration, with greater numbers moving in than out. Negative migration began again from 1981 and continued during the 80s until 1991-1996 when every western county, except Donegal, had positive net migration. All western counties had positive migration from this time until 2011.

The rates of positive net migration during this period far exceeded what had been experienced during the 70s. Leitrim, Roscommon and Galway⁵ in particular experienced very high net inward

⁵ Galway city and county are combined due to boundary changes during this period.

migration. As noted above, all counties returned to negative migration in the most recent period. Migration closely mirrors economic and employment cycles.

Fig. 15: Average Annual Estimated Net Migration rate per 1,000 population, 1951-2016



Source: CSO (2016), Preliminary Census Results, Table EP006

<http://www.cso.ie/px/pxeirestat/Statire/SelectVarVal/Define.asp?maintable=EP006&PLanguage=0>

4.0 Housing

4.1 What is the housing stock in the Western Region?

In 2016 the Western Region had a housing stock of 404,494, an increase of 0.8% or 3,183 on 2011. Nationally the increase was 0.9% over this period (18,981). These relatively small increases are not surprising following the economic crash and the very limited house building since then. The longer term trends and differences occurring in different time periods are discussed below.

Within the region there was an actual decline in housing stock in three of the counties (see Table 5 below), Roscommon -0.5% (-173), Sligo -0.2% (-51) and Leitrim -0.2% (-36), indicating some houses being taken out of the housing stock. The data does not tell us whether these are 'ghost estates' or not. Though these are marginal changes, there were also declines in the housing stock in just a few other places, for example, Dublin and Limerick cities and Longford. In contrast, within the Western Region only Galway city recorded a significant increase in housing stock of 3.5%, the highest recorded rate increase across the State.

Table 5: Housing stock in the western counties, Western Region and rest of state, 2006-2011

	2006 (No.)	2011 (No.)	2016 (No.)	Percentage Change (2011-2016) (%)	Percentage Change (2006-2016) (%)
Clare	48,834	55,876	56,285	0.7	15.3
Donegal	70,526	84,351	84,785	0.5	20.2
Galway	98,326	111,859	113,975	1.9	15.9
<i>Galway City</i>	30,589	33,816	35,006	3.5	14.4
<i>Galway County</i>	67,737	78,043	78,969	1.2	16.6
Leitrim	15,282	18,239	18,203	-0.2	19.1
Mayo	58,717	66,063	66,547	0.7	13.3
Roscommon	26,979	31,707	31,534	-0.5	16.9
Sligo	28,751	33,216	33,165	-0.2	15.4
Western Region	347,415	401,311	404,494	0.8	16.4
Rest of State	1,422,198	1,602,603	1,618,401	0.9	13.8
State	1,769,613	2,003,914	2,022,895	0.9	14.3

Source: CSO, Census of Population 2011, Census of Population 2016, Preliminary Results.

4.1.1 How did the housing stock change over the 10 year period 2006-2016?

As the change in housing stock is so closely related to the most recent period of economic growth and decline, it is interesting to look at the figures over the 10-year period, 2006-2016. This period marks the time immediately before the peak of economic growth and growth in housing supply and the economic crash following this, culminating in the current period with the economy returning to growth.

Between 2006 and 2016, there was an increase in housing stock of 16.4% in the Western Region and this compares to 14.3% nationally (Table 5). Within the region, some counties had a very significant increase in housing stock, Donegal (20.2%), Leitrim (19.1%) and Roscommon (16.9%), highlighting the particularly strong growth rates in the Western Region. The evident contrast between the growth in supply in the earlier period and the limited growth, or even contraction, in the latter period

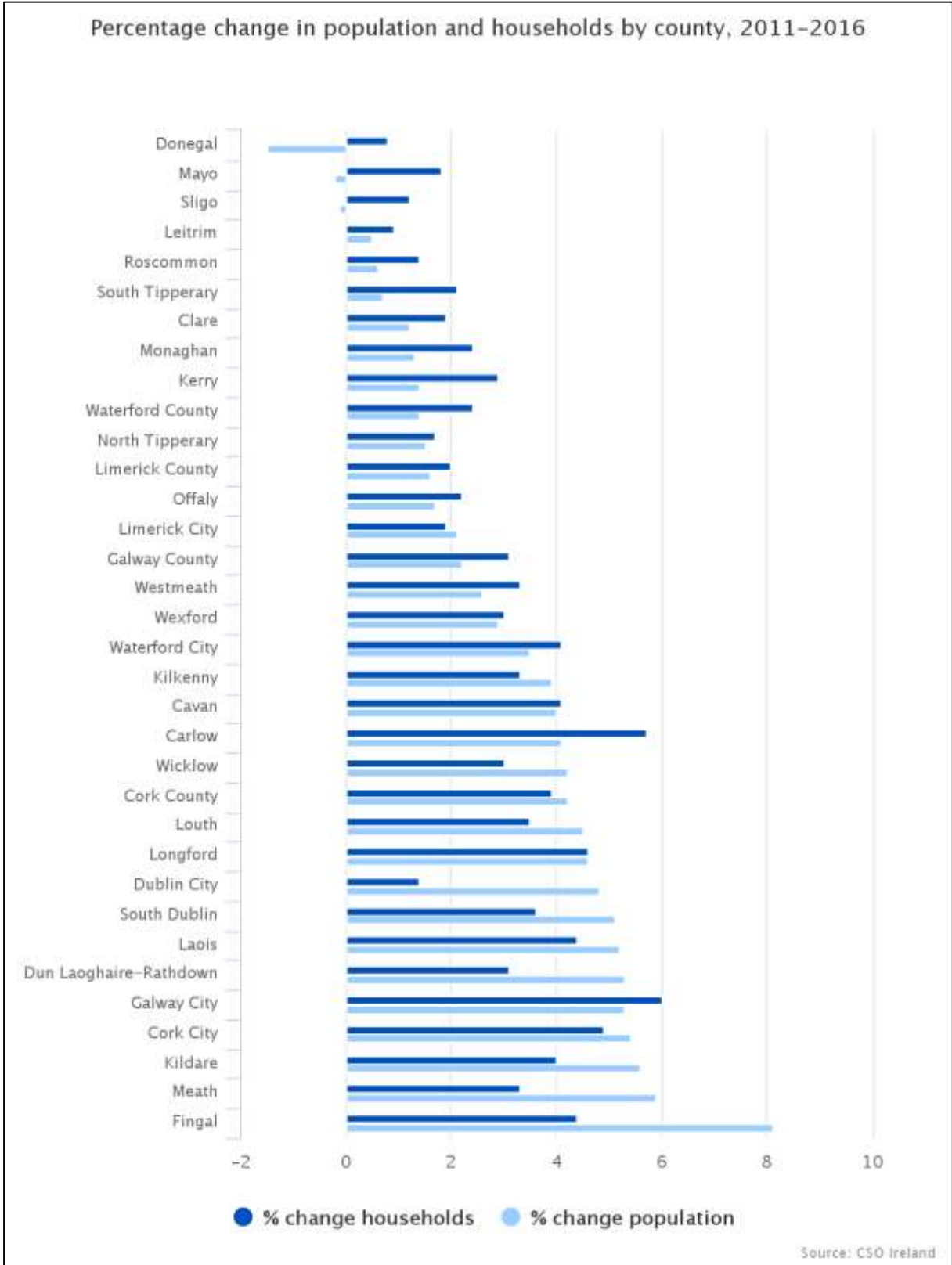
highlights the difference in house building activity over the periods.

It is worth noting that even with the limited growth in housing stock in the latter period, the growth in the Western Region between 2006 and 2016 of 16.4% is still nearly double the population growth in the region over the same period (8.6%).

4.1.2 How did changes in population and households compare during 2011-2016?

Looking at the period 2011-2016, the percentage change in both population and households by county is presented in Figure 16. While Donegal and to a lesser extent Mayo and Sligo all lost population, these counties (along with all others) experienced an increase in the number of households.

Fig. 16: Percentage change in population and households by county, 2011-2016



Source: CSO, Census of Population 2011, Census of Population 2016, Preliminary Results.

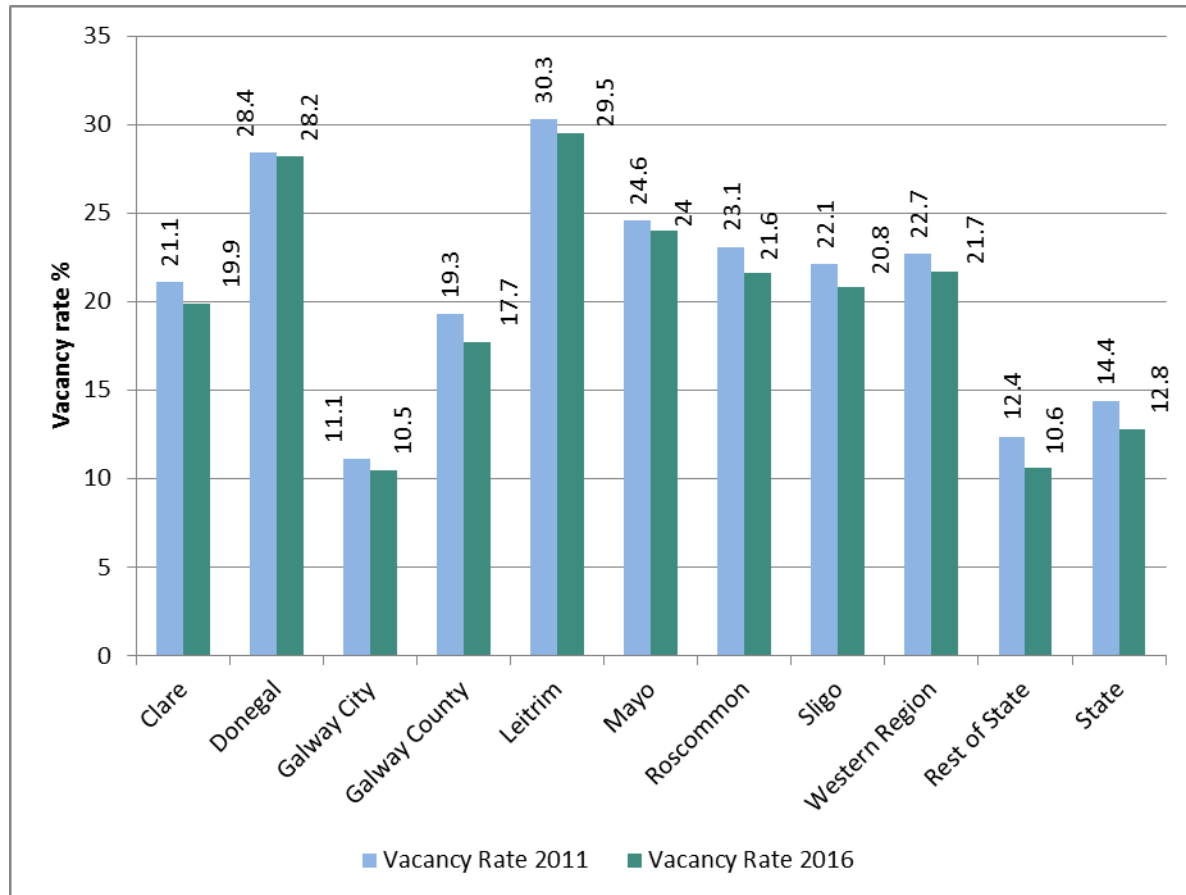
4.2 What were the vacancy rates in 2016?

The housing stock comprises occupied households, dwellings that are temporarily absent, vacant

holiday homes and other vacant dwellings.

The vacancy rate measures the share of the housing stock in each county that is recorded as a vacant dwelling by the Census enumerators. The average vacancy rate in the Western Region in 2016 was 21.7%, marginally lower than that in 2006 (22.8%) (Fig. 17).

Fig. 17: Vacancy rates in western counties, Western Region and State, 2011 and 2016

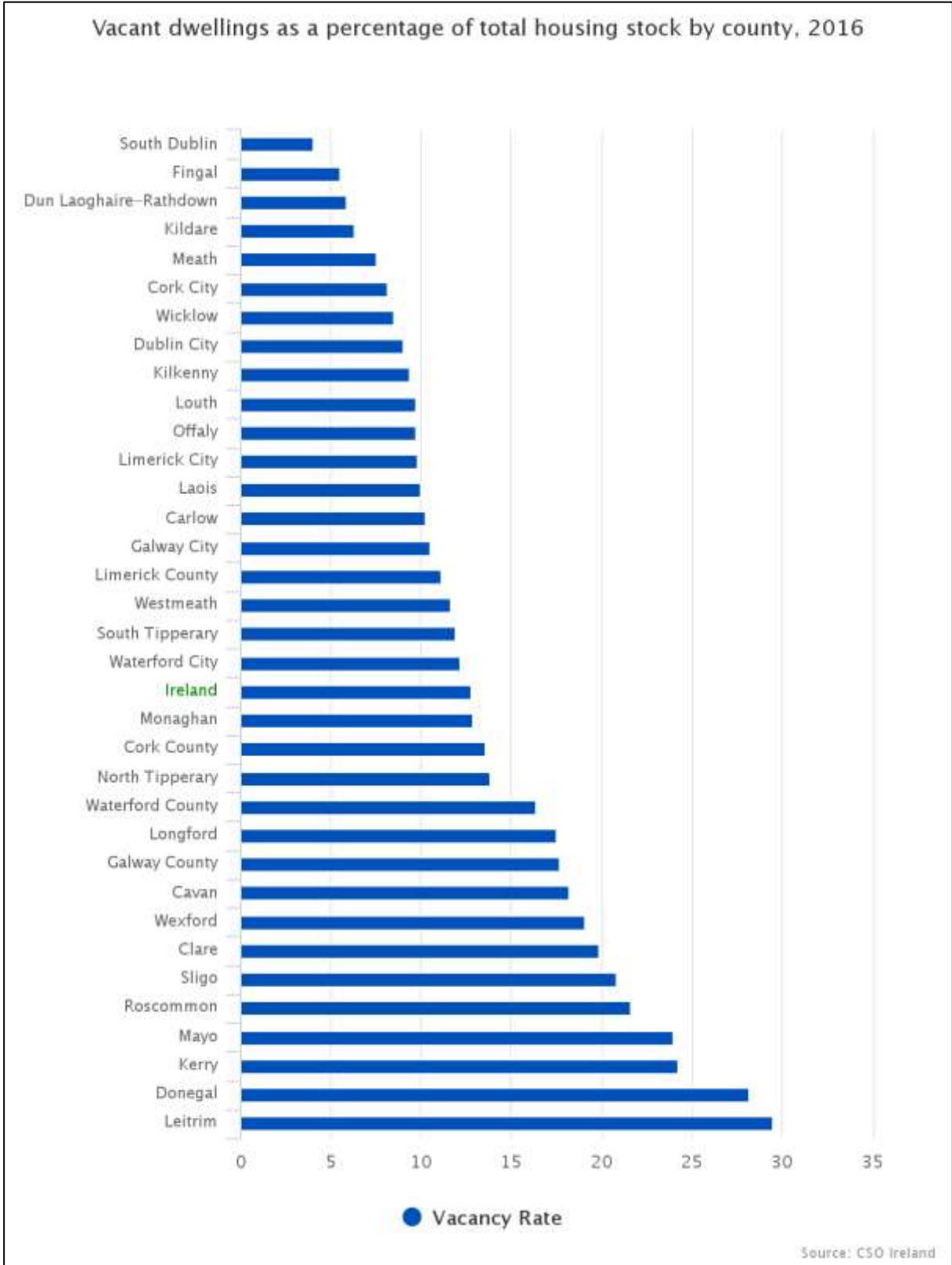


Source: CSO, Census of Population 2011, Census of Population 2016, Preliminary Results.

In total Leitrim (29.5%), Donegal (28.2%) and Mayo (24.0%) had the highest vacancy rates in the region, while Galway city (10.5%) had the lowest. All counties in the Western Region experienced a slight decrease in their vacancy rates between 2011 and 2016.

Nationally, the average vacancy rate in 2016 was 19.9%, a decrease on the 2011 rate of 22.8%. At a national level, Leitrim and Donegal have the highest vacancy rates in the country and this was also the case in 2011. Figure 18 below shows the vacancy rate by county in 2016.

Fig. 18: Vacant dwellings as a percentage of total housing stock by county, 2016



Source: CSO, Census of Population 2011, Census of Population 2016, Preliminary Results.

4.2.1 What were the vacancy rates for holiday homes?

A total of 29,418 housing units in the Western Region were classified as vacant holiday homes in 2016, an increase of 7.1% since 2011 (Table 6). The Western Region accounts for just under half

(48%) of all vacant holiday homes in the state. The region recorded an increase of 1,940 vacant holiday homes in the intercensal period, in contrast to the rest of the state where there was a decline in vacant holiday homes.

There has been some debate as to whether some housing is being reclassified as holiday homes so as to be eligible for short-term rentals through Airbnb.⁶ It is unclear from the preliminary data if this is a factor in the Western Region. Galway city recorded an increase of 61.7% in vacant holiday homes, significantly higher than the state average and other counties in the Western Region. Anecdotal evidence suggests that there are Airbnb properties across all counties in the Western Region, urban and rural.

Table 6: Vacant holiday homes in the western counties, Western Region and rest of state, 2006-2011

	2011 (No.)	2016 (No.)	Actual Change (2011-2016)	Percentage Change (2011-2016) (%)
Clare	4,610	4,739	129	2.8
Donegal	10,636	11,341	705	6.6
Galway	3,457	3,977	520	15.0
Galway City	183	296	113	61.7
Galway County	3,274	3,681	407	12.4
Leitrim	1,490	1,589	99	6.6
Mayo	4,454	4,766	312	7.0
Roscommon	1,062	1,164	102	9.6
Sligo	1,769	1,842	73	4.1
Western Region	27,478	29,418	1,940	7.1
Rest of State	31,917	31,786	-131	-0.4
State	59,395	61,204	1809	3.0

Source: CSO, Census of Population 2011, Census of Population 2016, Preliminary Results.

4.2.2 What were the vacancy rates for other vacant dwellings?

Table 7 below shows the number of 'other vacant dwellings' comprising houses and apartments, in 2011 and 2016 and the change and percentage change. All areas showed a decline over the period, though the decline in the Western Region is close to half that of the rest of the state.

County Galway has had the highest percentage decrease in other vacant dwellings over the period (-12.8%), though this is less than the state average of a decline of 13.8%. The full results will distinguish between vacant houses and vacant apartments as well as providing detail on where the vacancies are located.

⁶ <https://irelandafternama.wordpress.com/2016/07/15/displacement-in-dublin-some-thoughts-on-airbnb-vacancy-and-the-preliminary-census/>

Table 7: Other vacant dwellings in the western counties, Western Region and rest of state, 2006-2011

	2011 (No.)	2016 (No.)	Actual Change (2011-2016)	Percentage Change (2011-2016) (%)
Clare	7,172	6,480	-692	-9.6
Donegal	13,360	12,558	-802	-6.0
Galway	15,364	13,654	-1,710	-11.1
<i>Galway City</i>	3,572	3,375	-197	-5.5
<i>Galway County</i>	11,792	10,279	-1,513	-12.8
Leitrim	4,036	3,786	-250	-6.2
Mayo	11,776	11,180	-596	-5.1
Roscommon	6,270	5,658	-612	-9.8
Sligo	5,559	5,065	-494	-8.9
Western Region	63,537	58,381	-5,156	-8.1
Rest of State	166,519	139,977	-26,542	-15.9
State	230,056	198,358	-31,698	-13.8

Source: CSO, Census of Population 2011, Census of Population 2016, Preliminary Results.

5.0 Conclusion

The preliminary results of Census 2016 provide an initial snapshot of the demographic changes that have occurred over the past five years. Out-migration has been a key differentiating factor, as all counties experienced growth through natural increase, though least strongly in the most rural counties. Population loss due to migration and particularly among men, has led to three western counties (Donegal, Sligo and Mayo) losing population since 2011, a stark reversal of the long run trend of population growth since the early 90s. Counties in the north-west have shown the weakest population performance with the southern areas of the region (Galway and Clare) performing more strongly.

The housing stock has fluctuated very strongly, an overall increase of 16.4% in the housing stock in the decade 2006-2016, includes growth of just 0.8% in the most recent five years. Roscommon, Sligo and Leitrim even had decline. While vacancy rates in the region are declining, Leitrim and Donegal continue to have the highest rates of housing vacancy in the country.