

GMIT Strategic Planning Session

29 November 2017

*The Socio-economic Profile of
the Western Region*

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- 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

- 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

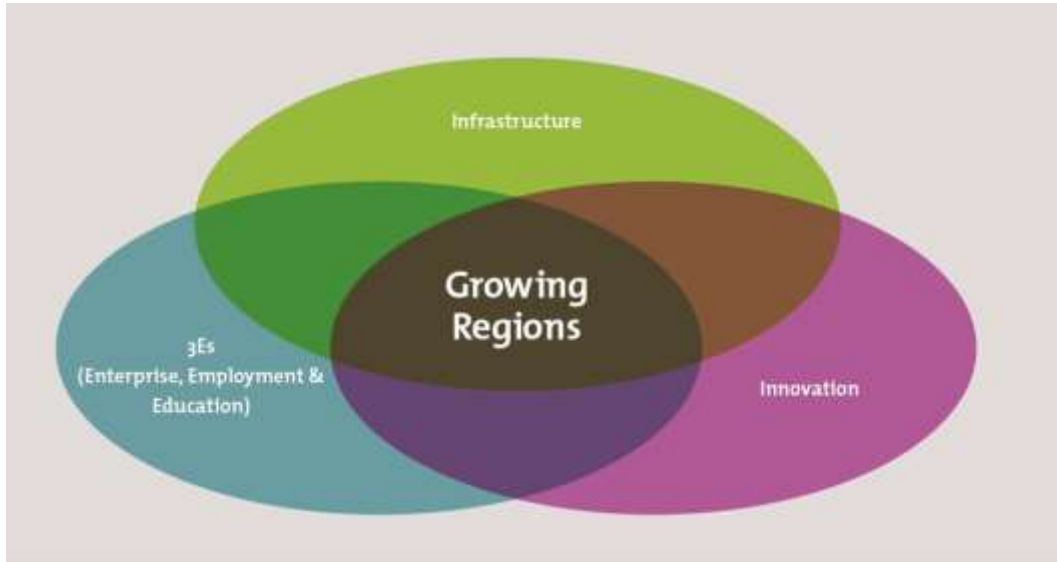


Policy team – What we do

- 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



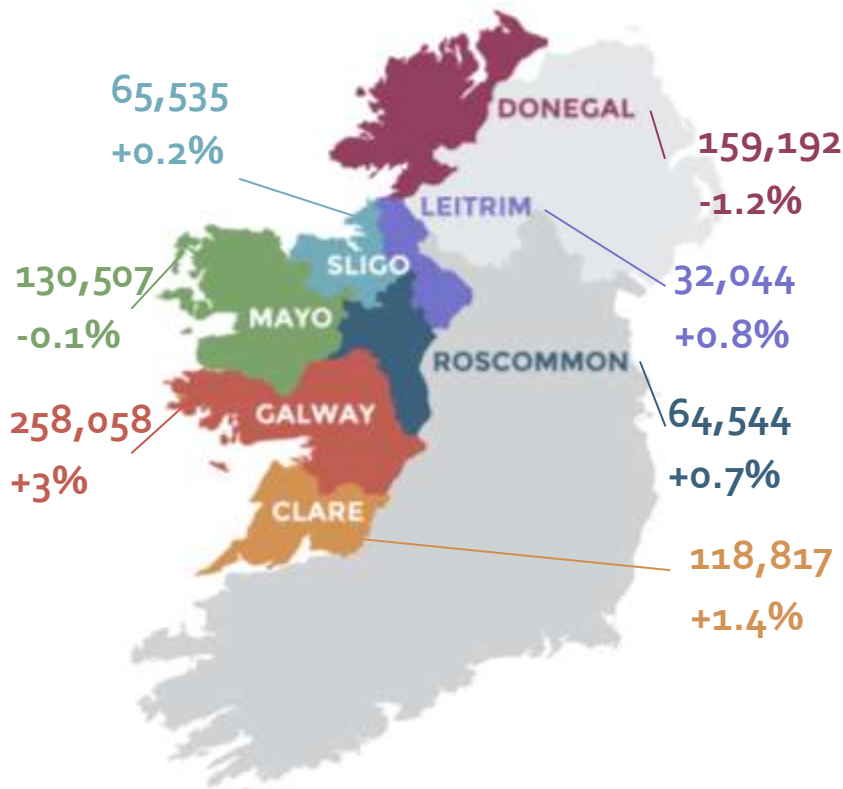
Policies for Regional Growth – Levers of Regional Development



- 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

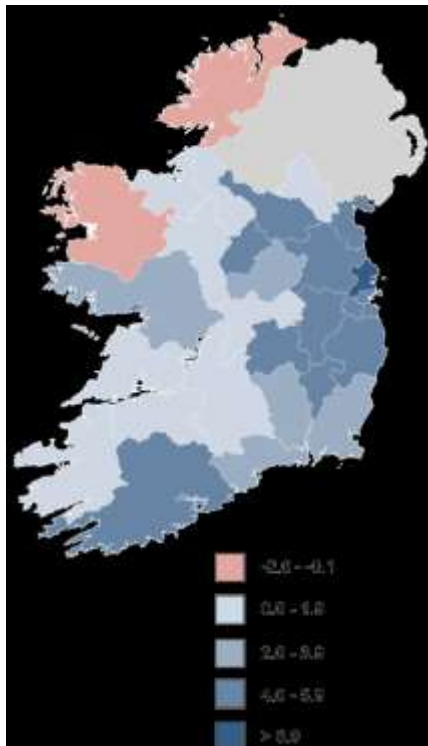


WR Region Profile – Census 2016: Population Change



	Population 2016	Actual Change (2011-2016) (No.)	Percentage Change (2011-2016) (%)
Galway City	78,668	3,139	4.2
Galway County	179,390	4,266	2.4
Mayo	130,507	-131	-0.1
Roscommon	64,544	479	0.7
West Region	453,109	7,753	1.7
State	4,761,865	173,613	3.8

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

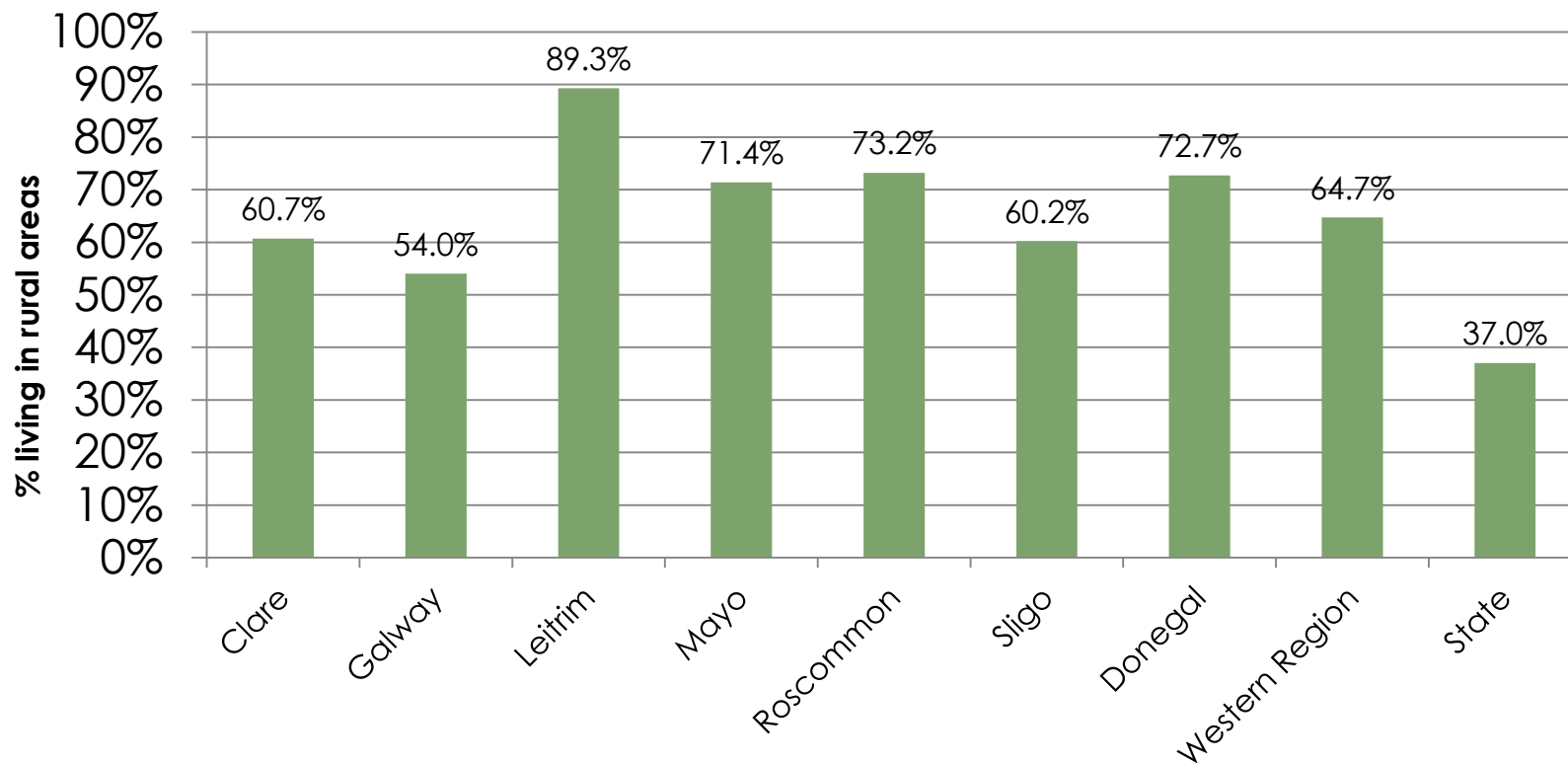
Mayo – 40.2 yrs

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

% Living in rural areas in Western counties (2016)



The Western Region Profile – Key Statistics



■ Income

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

■ Output

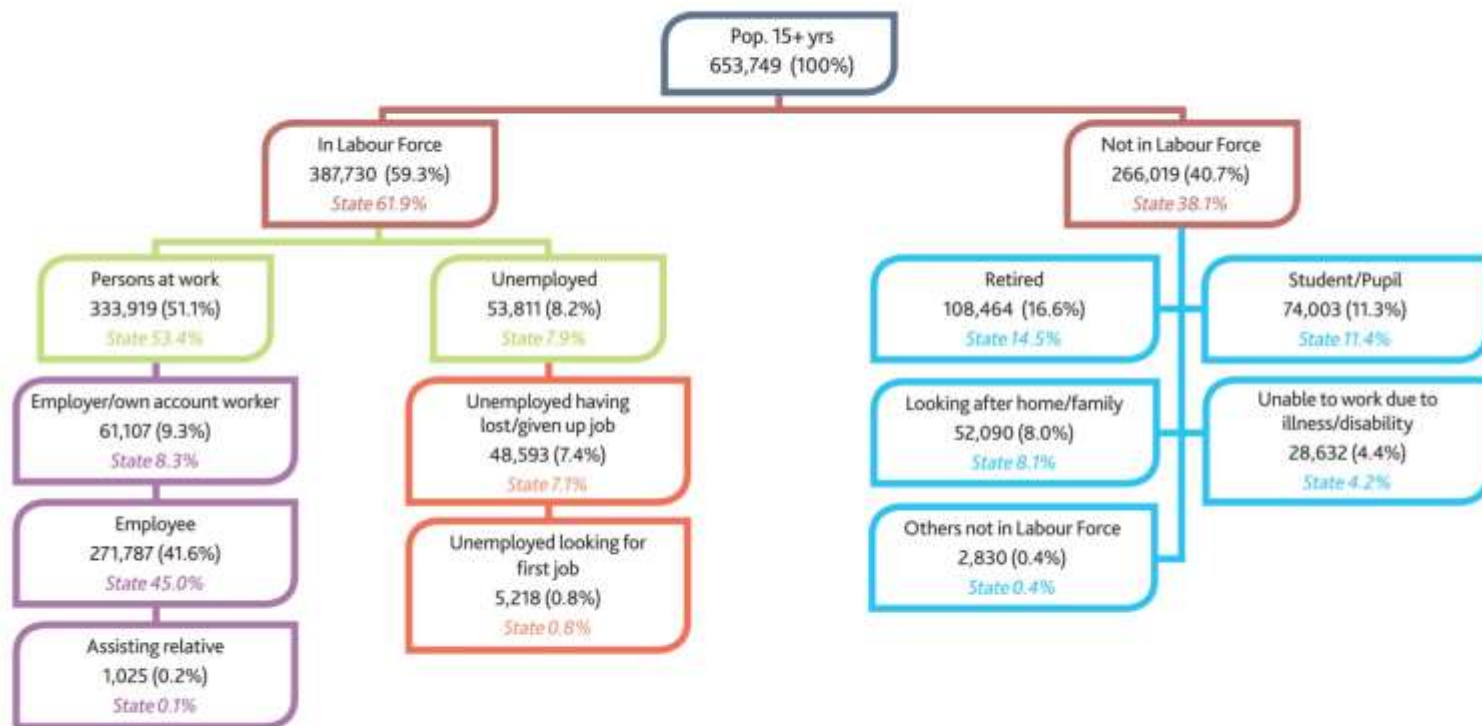
- West Gross value added (GVA) is 71.3% of state avg (2014)
- Border GVA is 48.2% of state avg (2014)

■ Labour Market

- 333,919 people 'at work' (2016)
- 53,811 unemployed (2016)

- 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

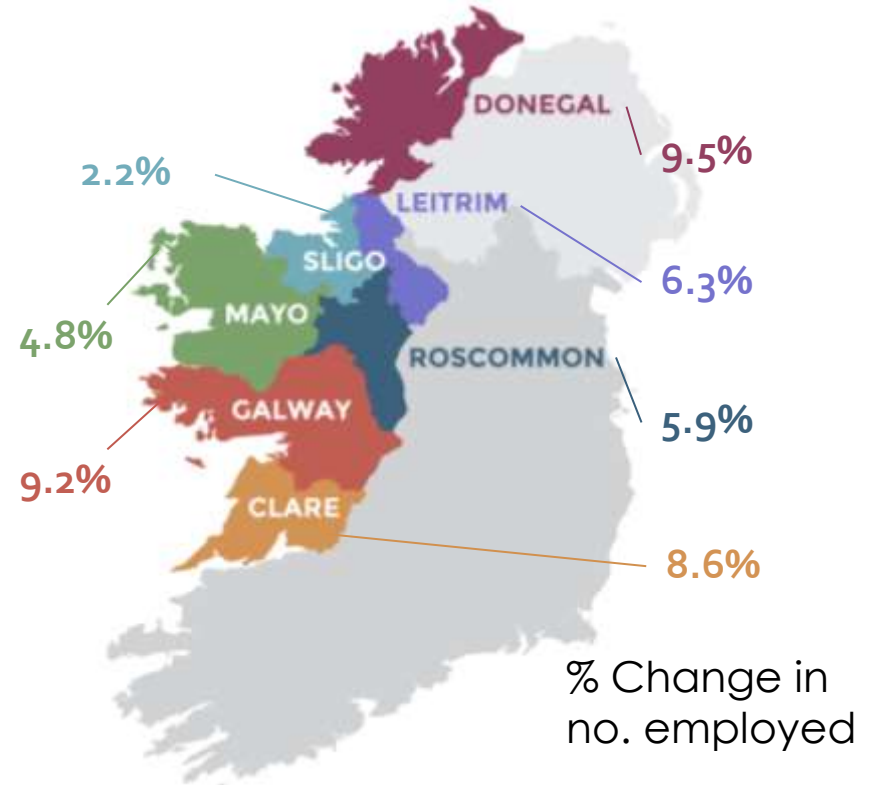


Source: CSO, Census 2016 Summary Results – Part 2. Table EZ011. Analysis by Western Development Commission (WDC)

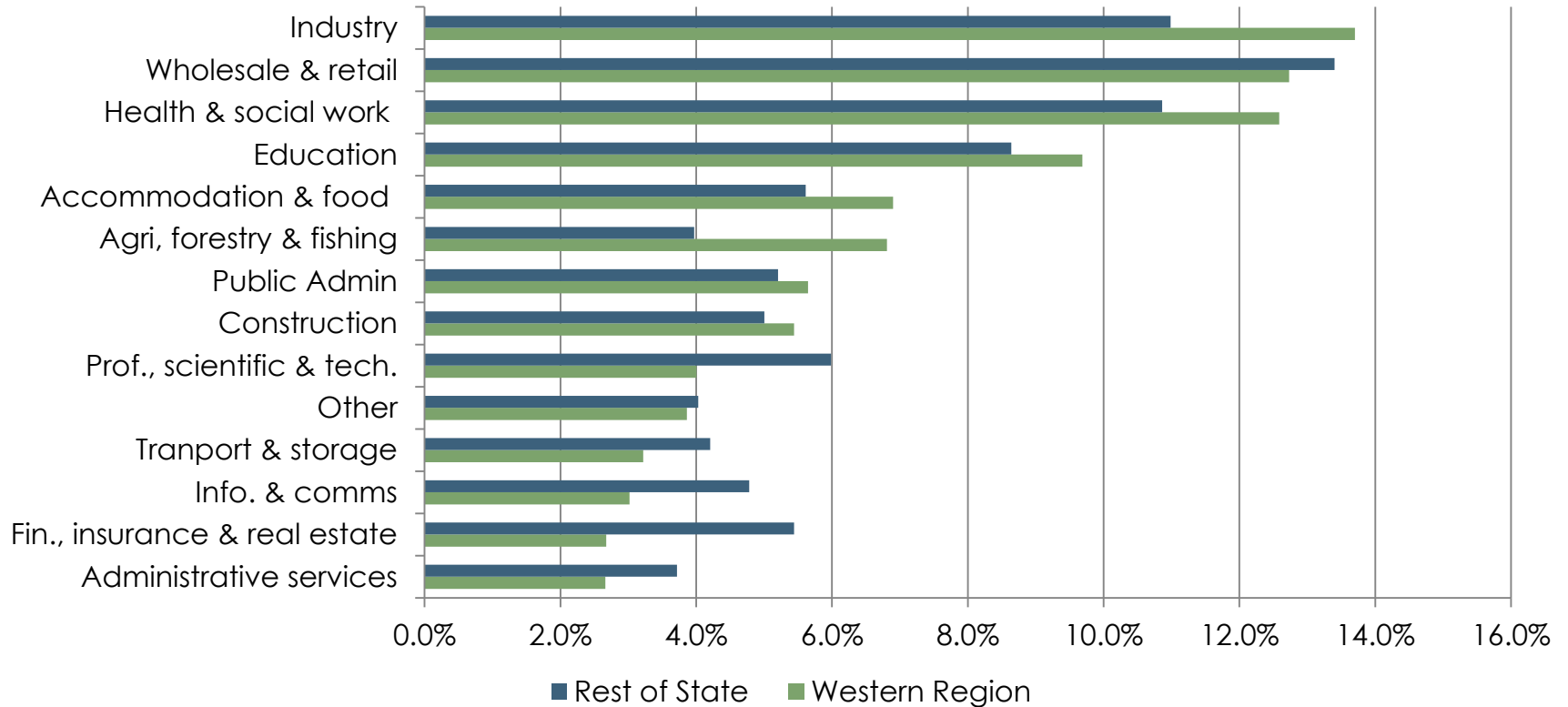
- Western Region compared to State average
- **Lower % in labour force – workers and unemployed**
- Lower % at work, Higher % unemployed
- Lower share of employees, higher share of self-employed
- **Higher % Not in Labour Force – retirees mainly**
- But Galway city broadly more similar to State average, 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



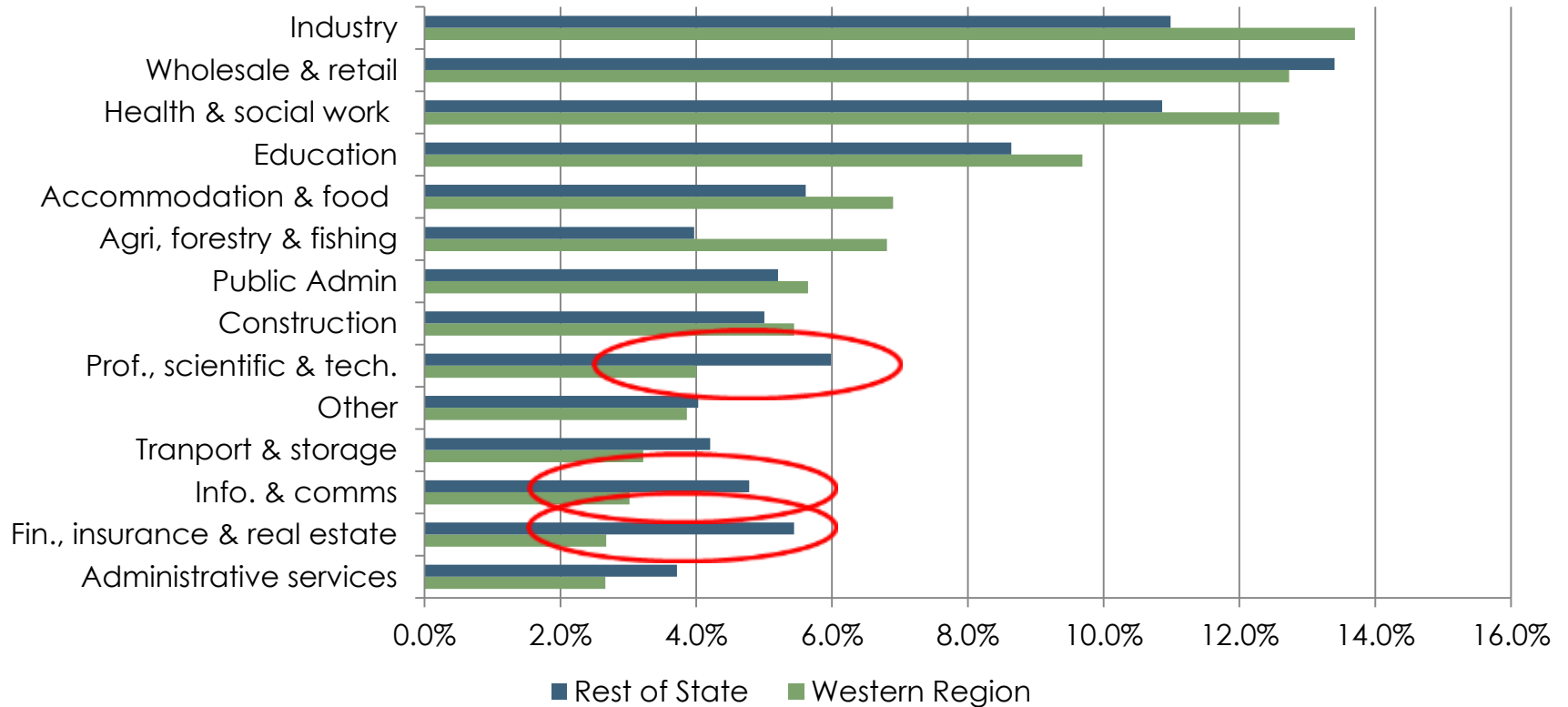
Western Region Employment Profile - % of employment by sector (2016)



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



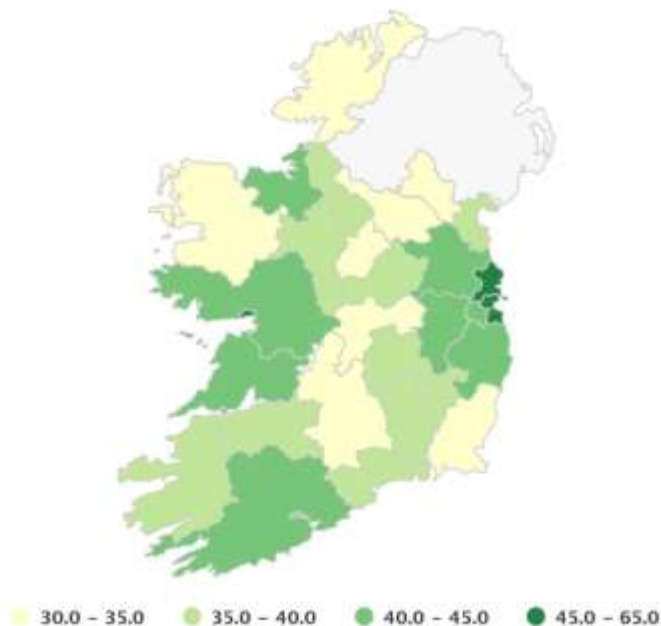
% of employment by sector in Western Region and Rest of State (2016)



- **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

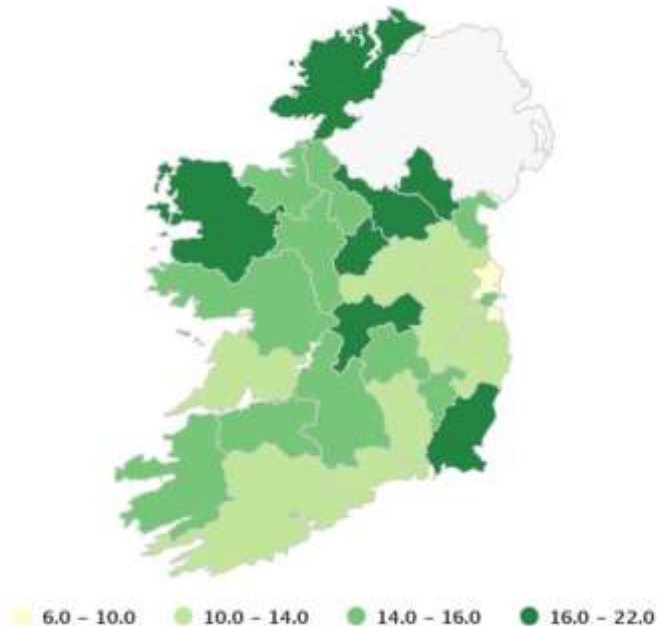
Map 1.1 Percentage of persons aged 15 years and over with third level qualifications, 2016



- 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

Map 1.2 Percentage of persons aged 15 years and over with no formal or primary only education, 2016

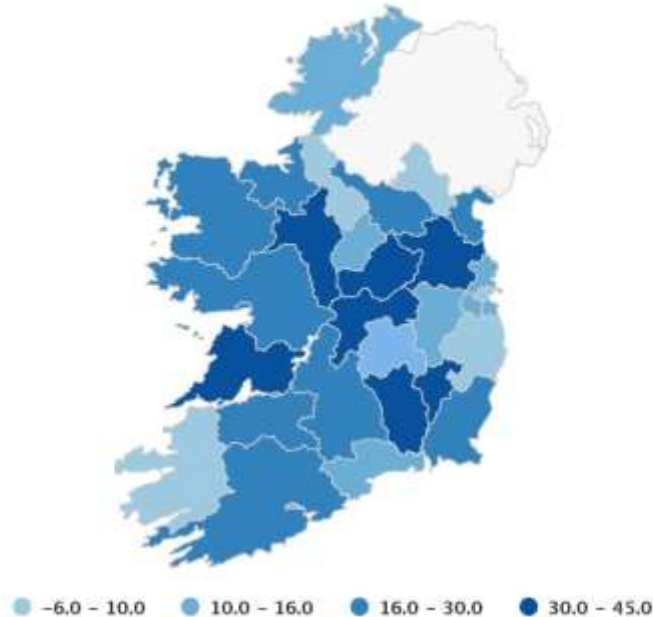


- One in five persons (21.9%) in Donegal, aged 15+ had not been educated beyond primary level, the highest for any county
- Dún Laoghaire-Rathdown- lowest 6.6%
- Galway City 8.6%
- Co. Galway 14.9%
- Mayo 17.4%
- Roscommon 15.5%
- Sligo 14.2%
- Leitrim 15.7%
- Donegal 21.9%
- Clare 12.1%

But this Education profile reflects Jobs profile!

Profile of Third Level Students - Travel patterns 2011-2016

Map 5.3 Percentage change in college students travelling on public transport to college, 2011-2016



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)

Third level - Travel Patterns contd.

- 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!

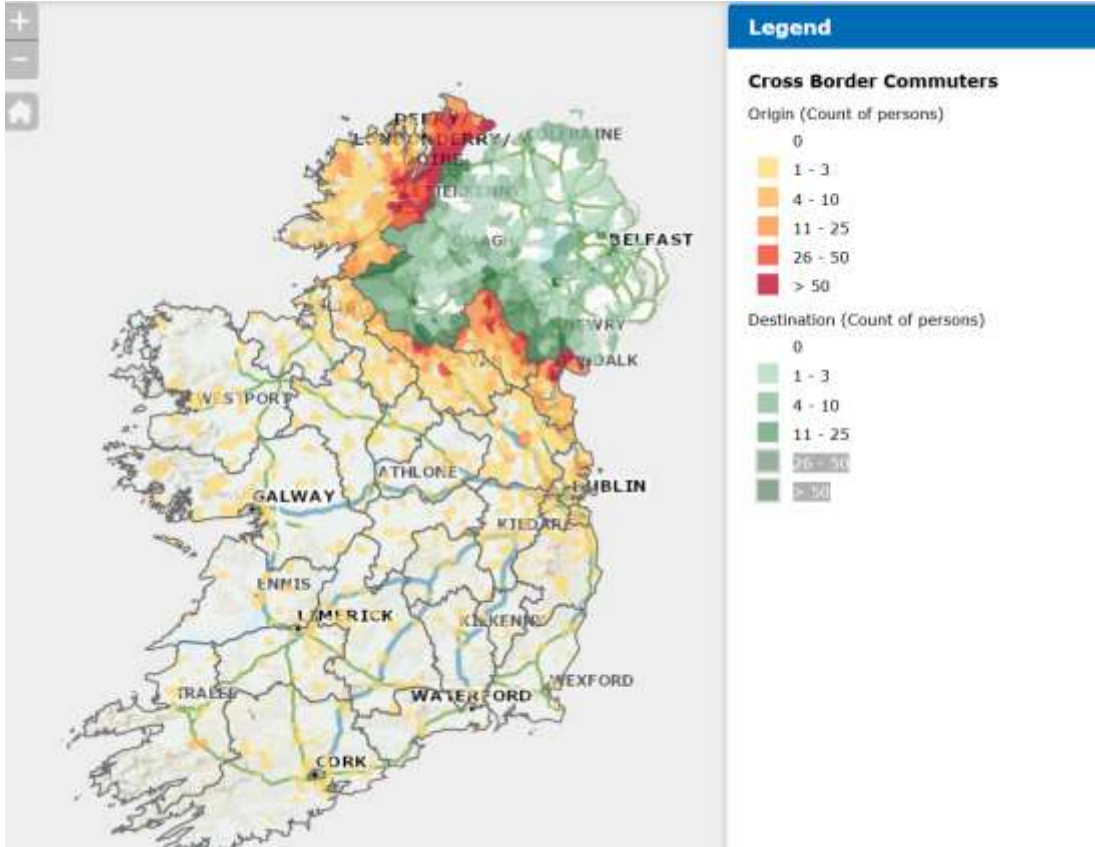
Some issues to consider – Trends/ Futures

- 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

Commuting: Origin and destinations of cross border workers and students - Census 2016



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)



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

- 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
- Sligo & Mayo: lowest growth in employment in State 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

- ***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 Grangeorman in Dublin. The Institutes of Technology in the West and North and proposed TU are important drivers – need to be named.

Capital Investment – 10 year plan

- 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

- 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



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

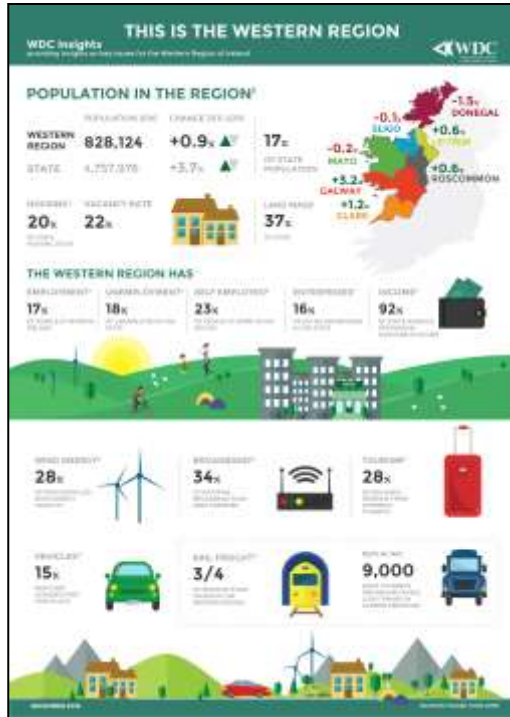
■ Regional & Spatial Development

- 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



Thank You

Q&A

All publications at www.wdc.ie/publications/

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