

WDC Insights on the Western Region

*Department of Social Protection
30 January 2017*

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

Western Development Commission



- 7-county Western Region
- State body under the Department of Arts, Heritage, Regional, Rural & Gaeltacht Affairs
- WDC Act 1998

'... foster and promote the economic and social development of the Western Region'

Western Development Commission

1. Inform **policy**-making through **analysis** of region's issues & needs (e.g. labour market, infrastructure)
2. Promote living, working & doing business in Western Region – **LookWest.ie**
3. Support sustainable **development** based on region's resources (e.g. renewable energy, creative industries)
4. Provide risk capital to SMEs & social enterprises through **WDC Investment Fund**



Policy Analysis

- **Socio Economic Analysis**
 - Analysis of a range of indicators for the Western Region – Demography, Rural, Labour Market, eWork, Enterprise, Income, Output, Sectoral, Regional
- **Infrastructure**
 - Broadband
 - Transport: Rail, aviation, road
 - Energy: Electricity, Natural Gas, Renewables
- **Submissions & engaging with the broad policy making process**
 - Our focus is issues affecting the Region
- **Reports, WDC Policy Briefings, *WDC Insights*, *WDC Insights Blog***

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MAKING THE CASE FOR THE WESTERN REGION



REPORT

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INFOGRAPHICS

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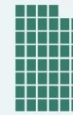
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BLOG POSTS

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ANALYSIS OF SOCIO-ECONOMIC DATA



ENGAGING WITH POLICYMAKERS



SUPPORTING LOCAL & REGIONAL STAKEHOLDERS



Why consider regional data?

- More information on the areas for which we are responsible.
- Regional development (and more broadly national development) is a multi-dimensional concept.
- To understand it better, it is important to examine information from a variety of sources to gain insights into economic & social outcomes.
- A regional perspective is necessary since changes & inequalities not only occur among individuals but also *the places where they live*.



What does the data say about the Western Region?

1. Population: Preliminary Census Results
2. Labour Market: QNHS
3. Income: County Incomes & Regional GDP
4. Enterprise: Business Demography

POPULATION

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Preliminary Census 2016 Results

- Initial results- based on enumerators forms
- Subject to revision
- Only cover a small number of indicators (population by ED, migration and housing vacancies)
- No data on towns or by age category
- 2011-2016 was a period of fluctuation and uncertainty in population trends.
- Trends for Western Region worrying



The headline figures

	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%

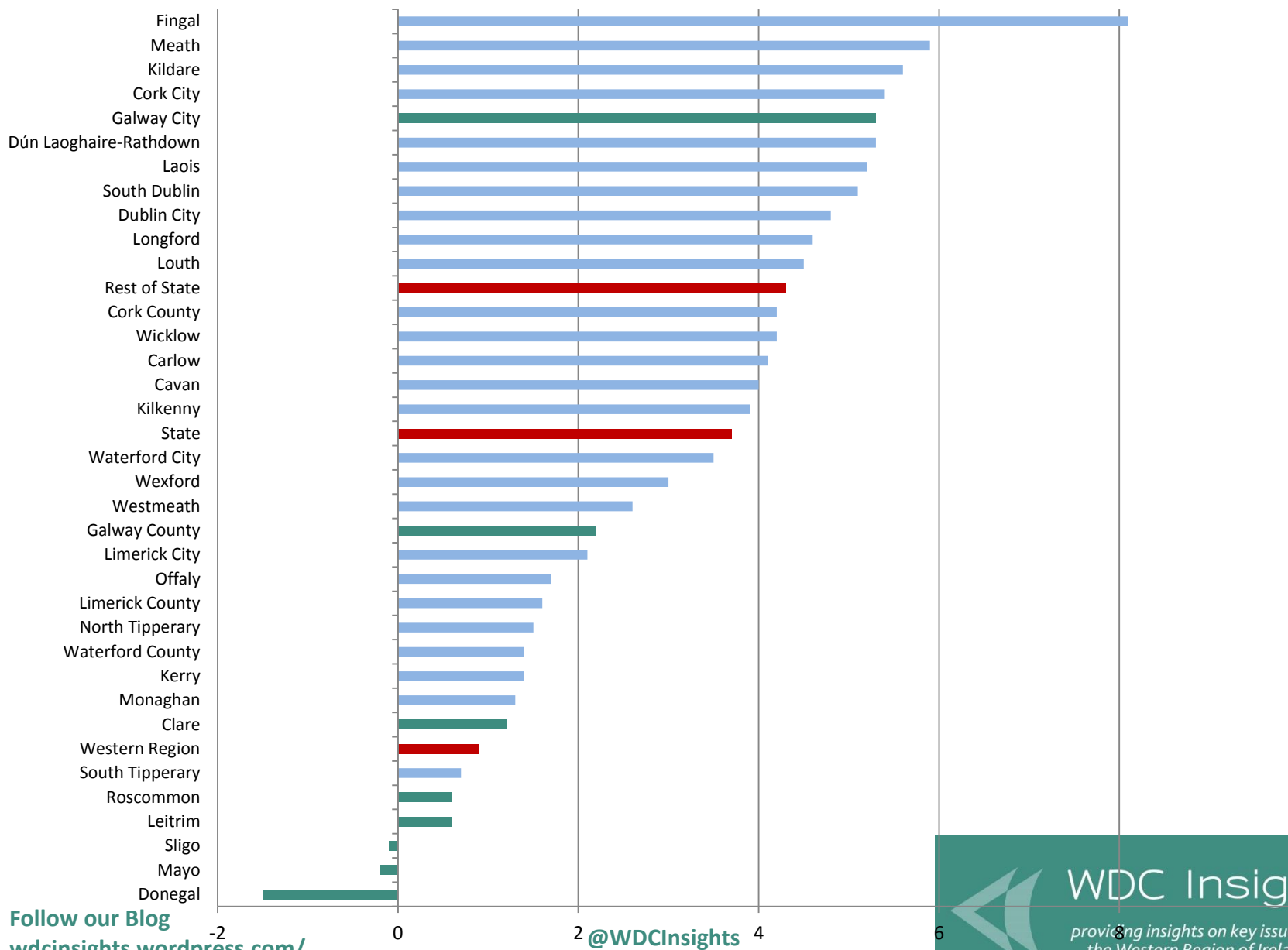


Population change

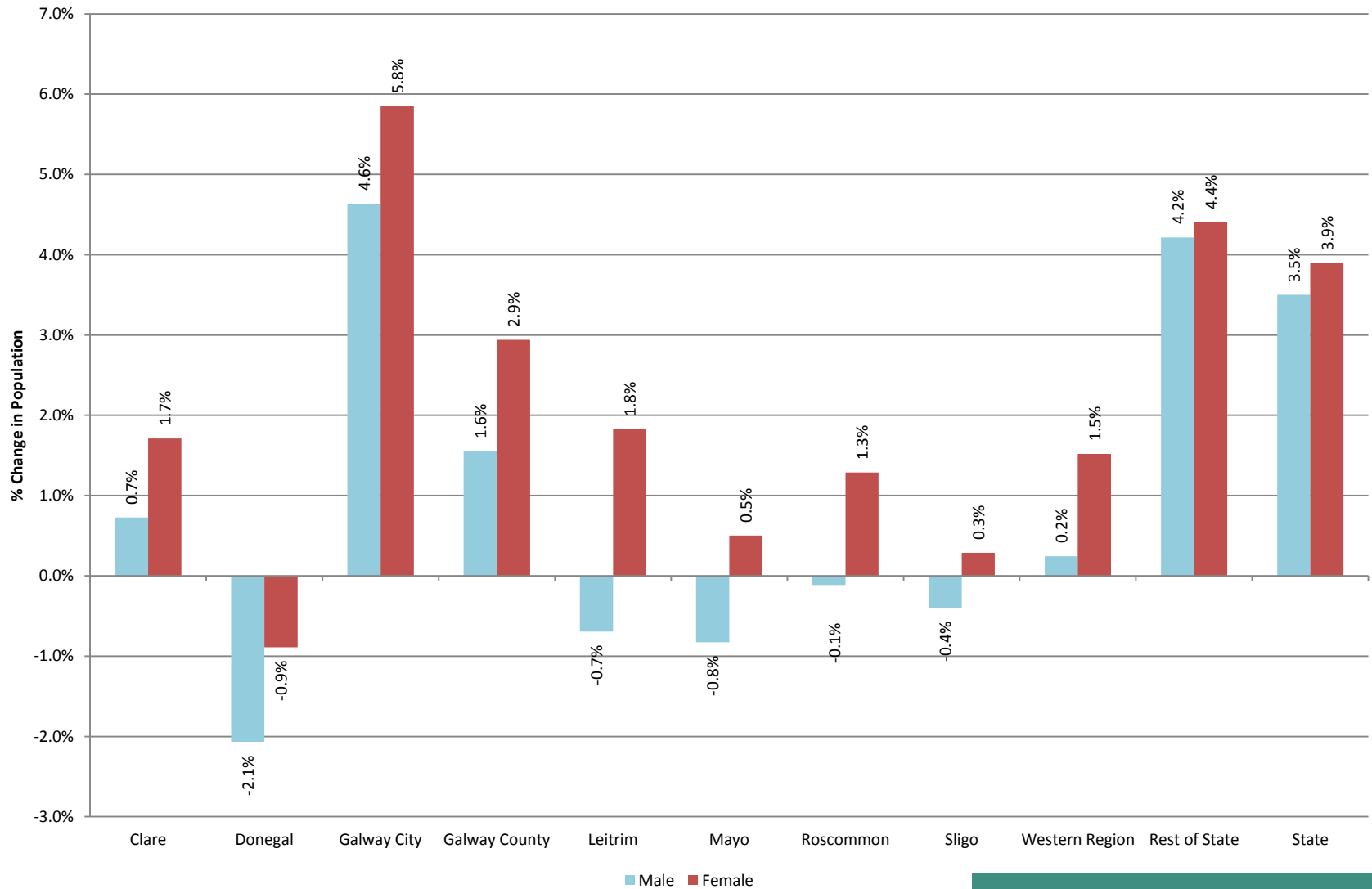
- The Western Region population was 828,124 people in April 2016. it increased by 7,244 people since 2011 (0.9%). The state population was 4,757,976. It increased by 3.7% between 2011 and 2016.
- Three counties in the Western region showed population decline (Donegal, (-1.5%) , Mayo (-0.2%) and Sligo (-0.1%)
- In all counties 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 less (males 4.2%; females 4.4%).
- More EDs in the Western Region experienced population decline (533) than showed population growth (433). 262 EDs had a population decrease of more than 5%. 16 had population decreases of more than 15%



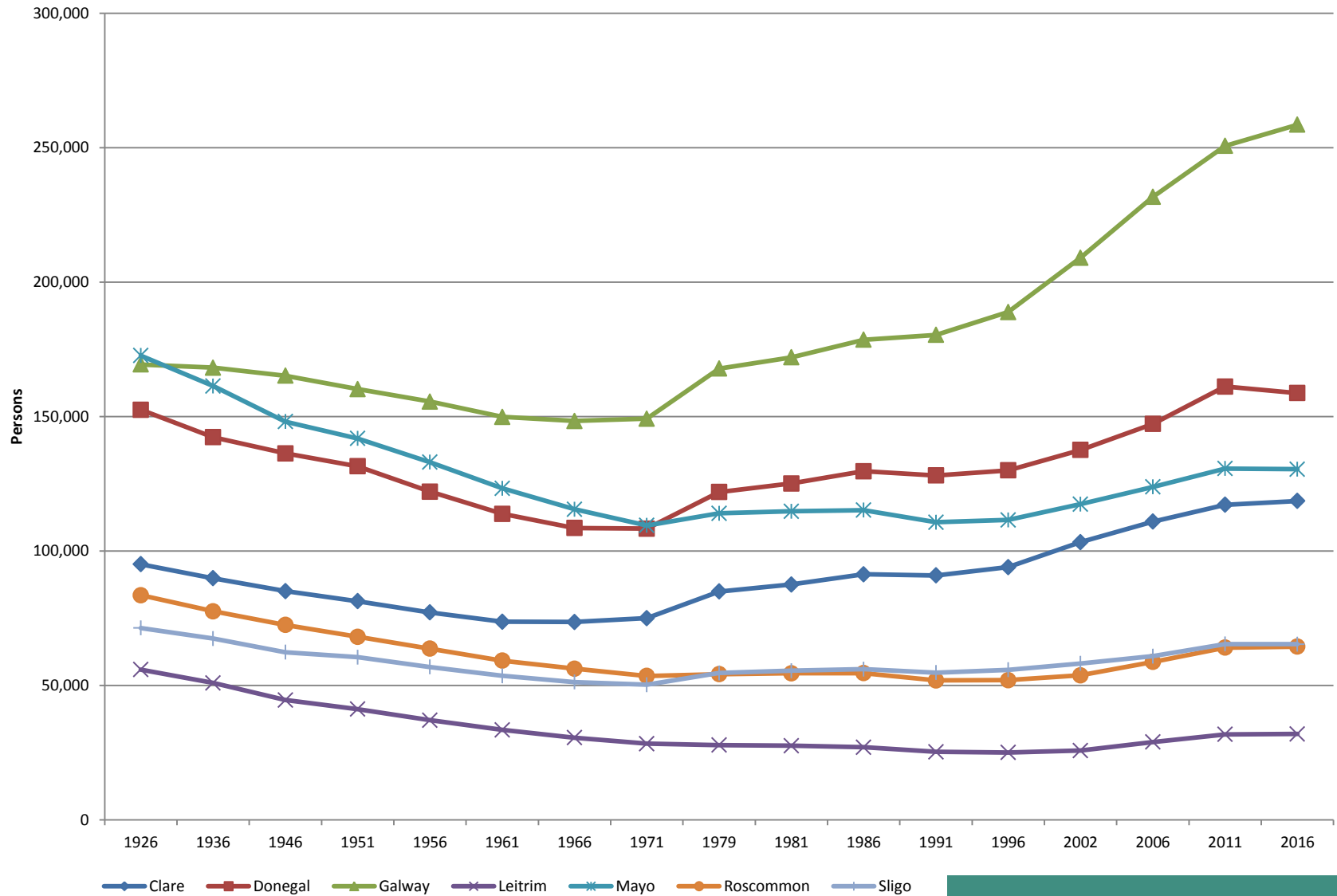
Percentage change in population 2011-2016



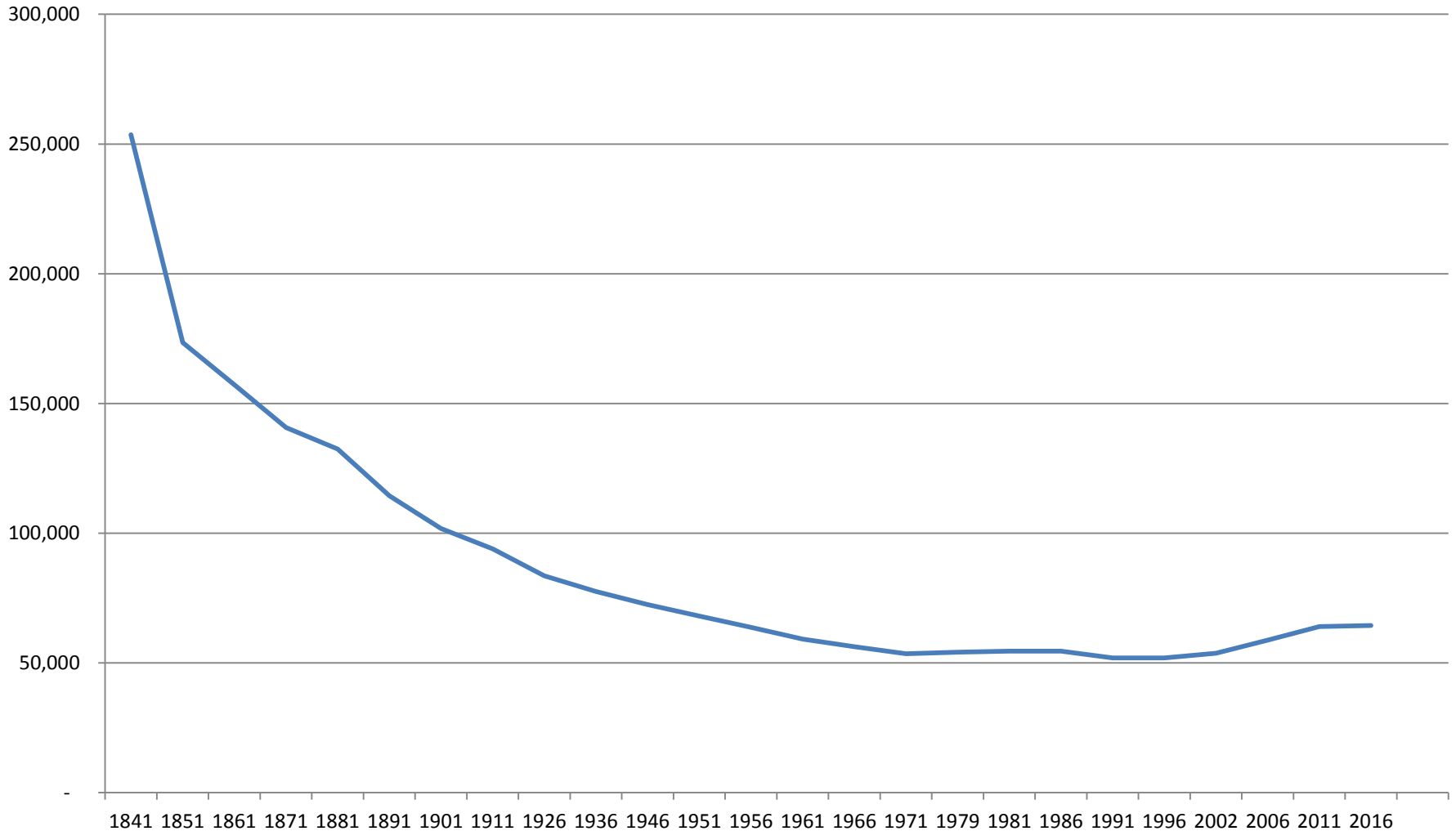
Percentage change in male and female population 2011-2016



Population of the Western Region counties, 1926-2016



Roscommon population, 1841-2016



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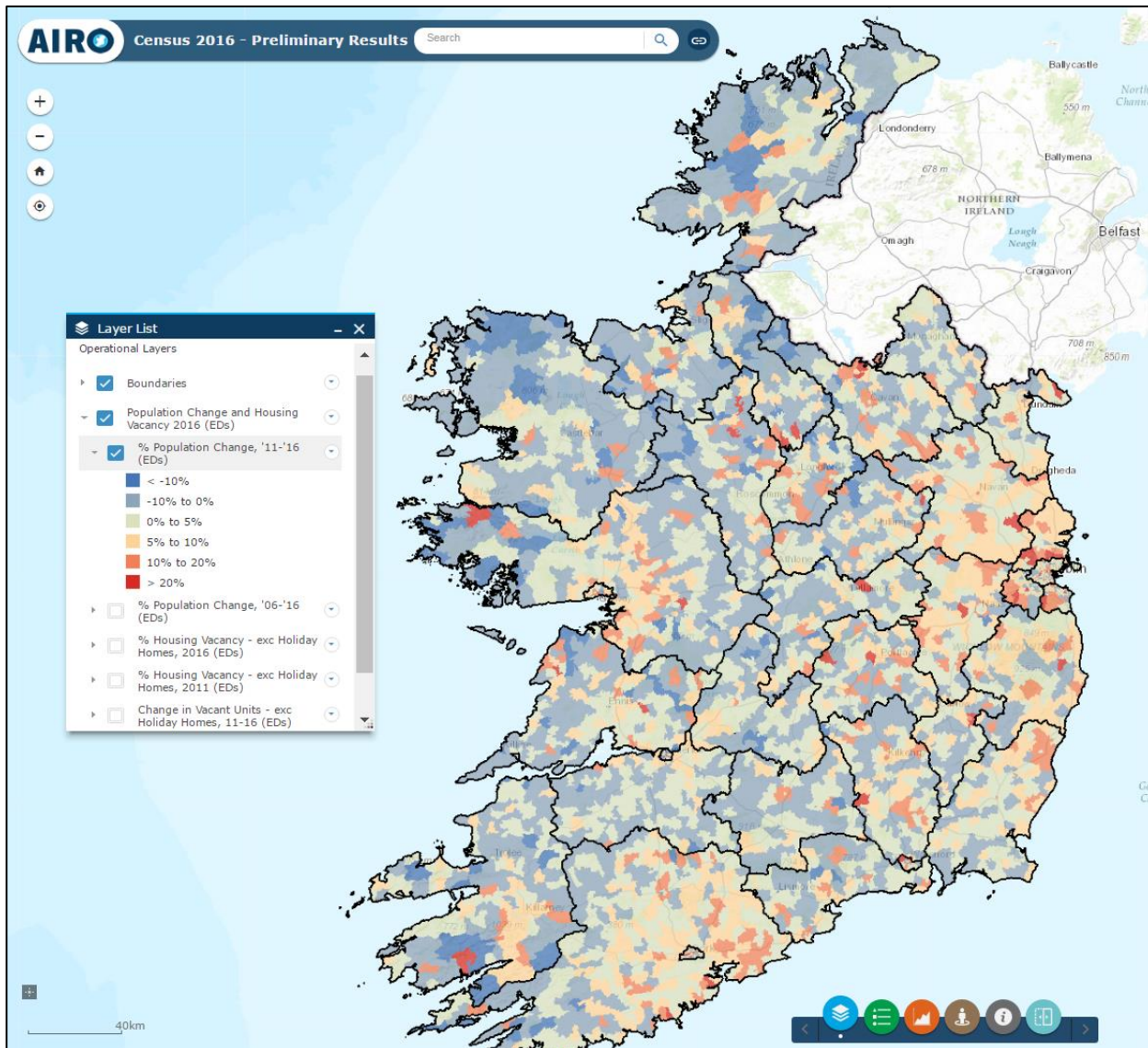
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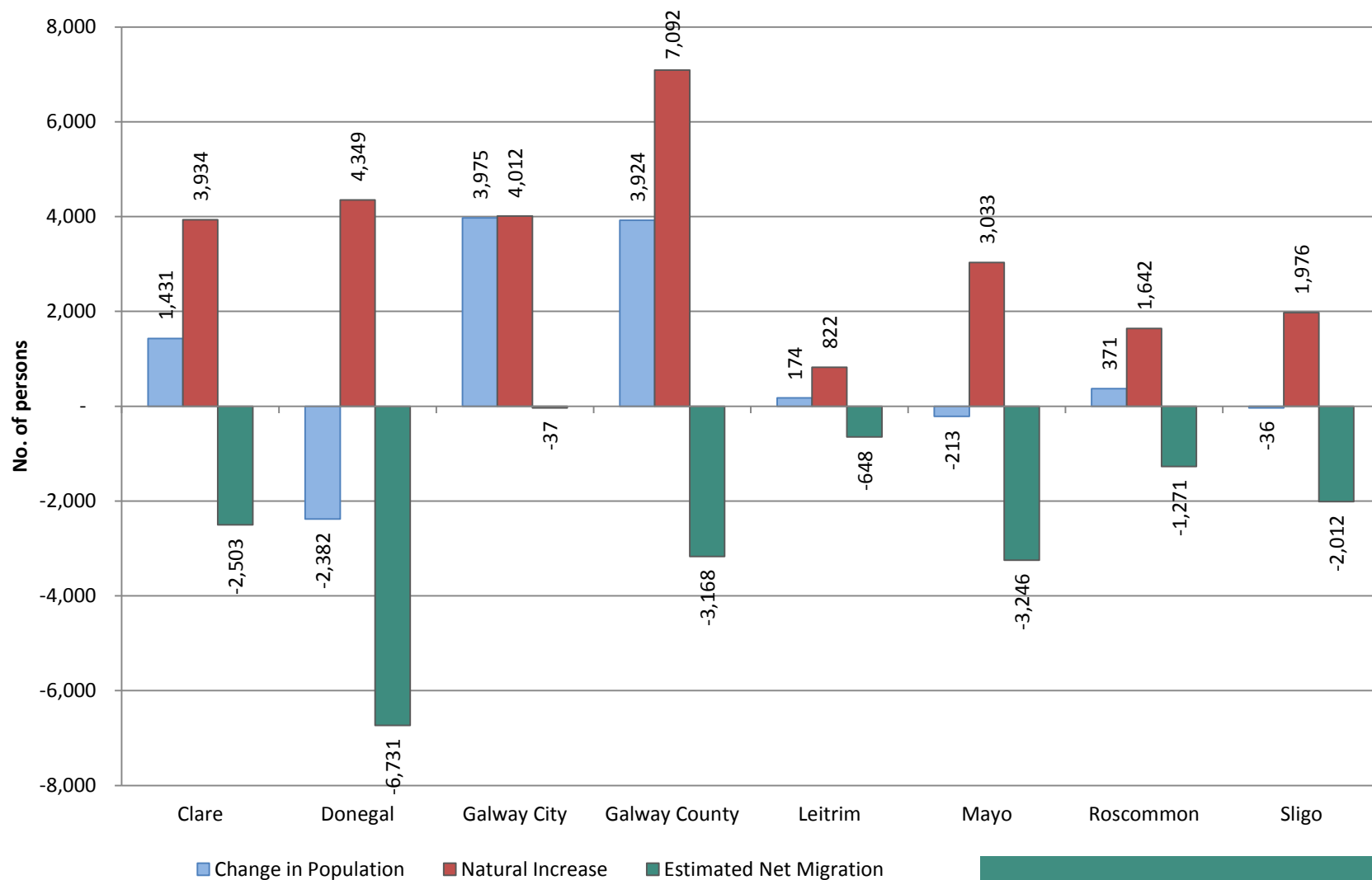
Percentage change in the population of Electoral Divisions, 2006-2011



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 had enough negative net migration to lead to population decline.
- All western counties, and all but six areas nationally, had negative net migration between 2011 and 2016. Donegal and Sligo had the two highest rates of negative net migration nationally.
- 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 country.

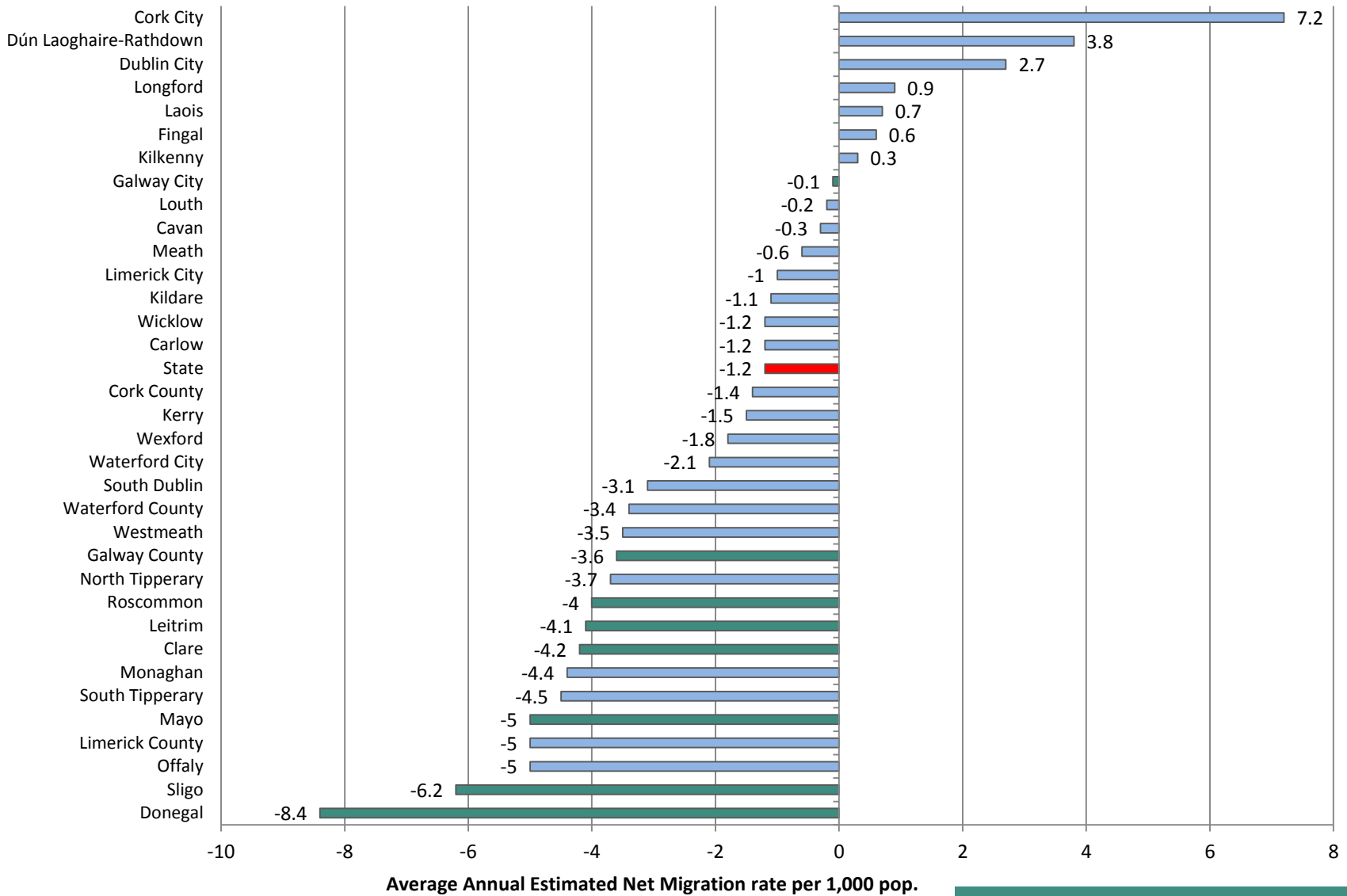
Components of population change in western counties, 2011-2016



Estimated net migration by gender in western counties, 2011-2016



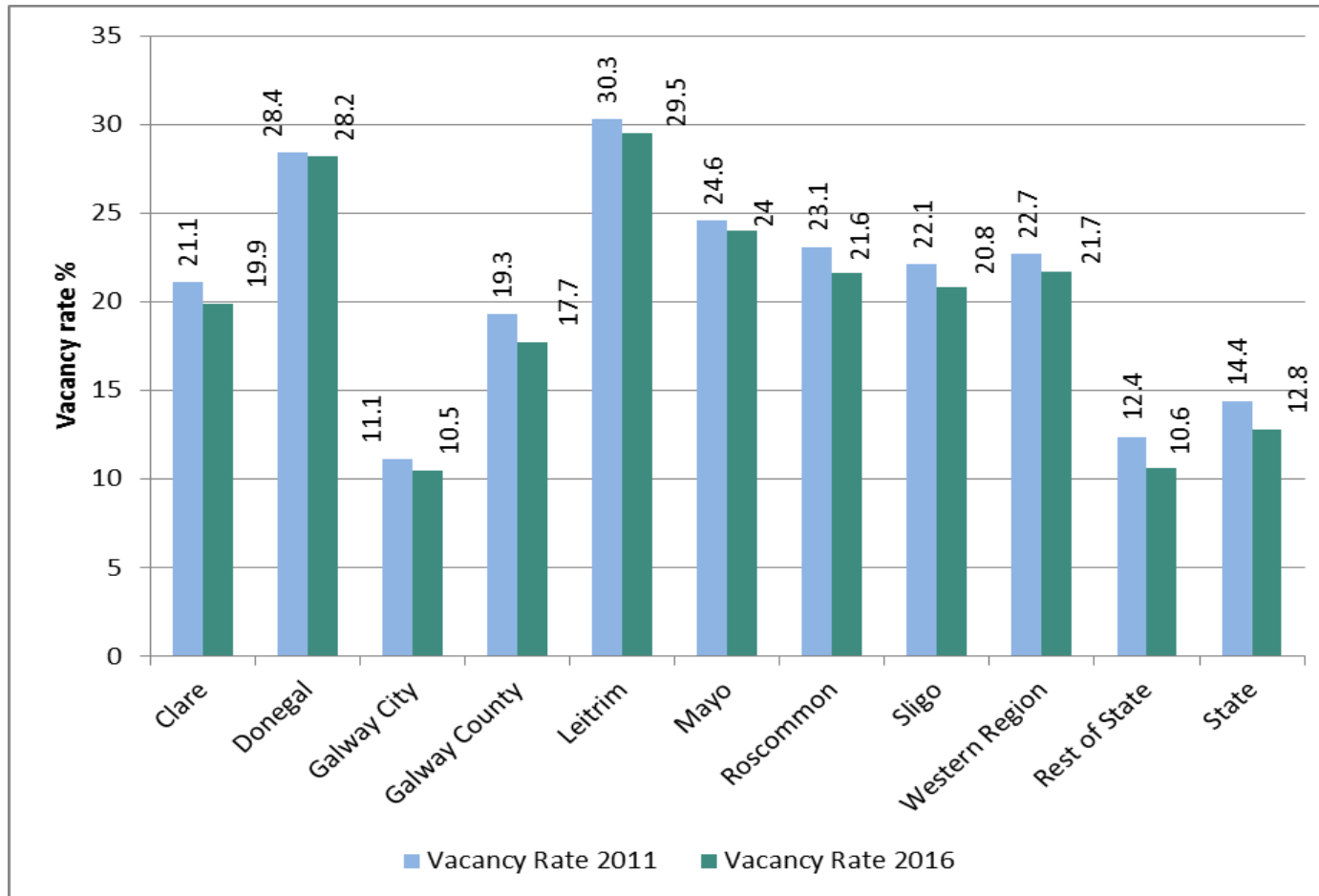
Average annual estimated net migration rate 2011-2016



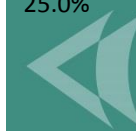
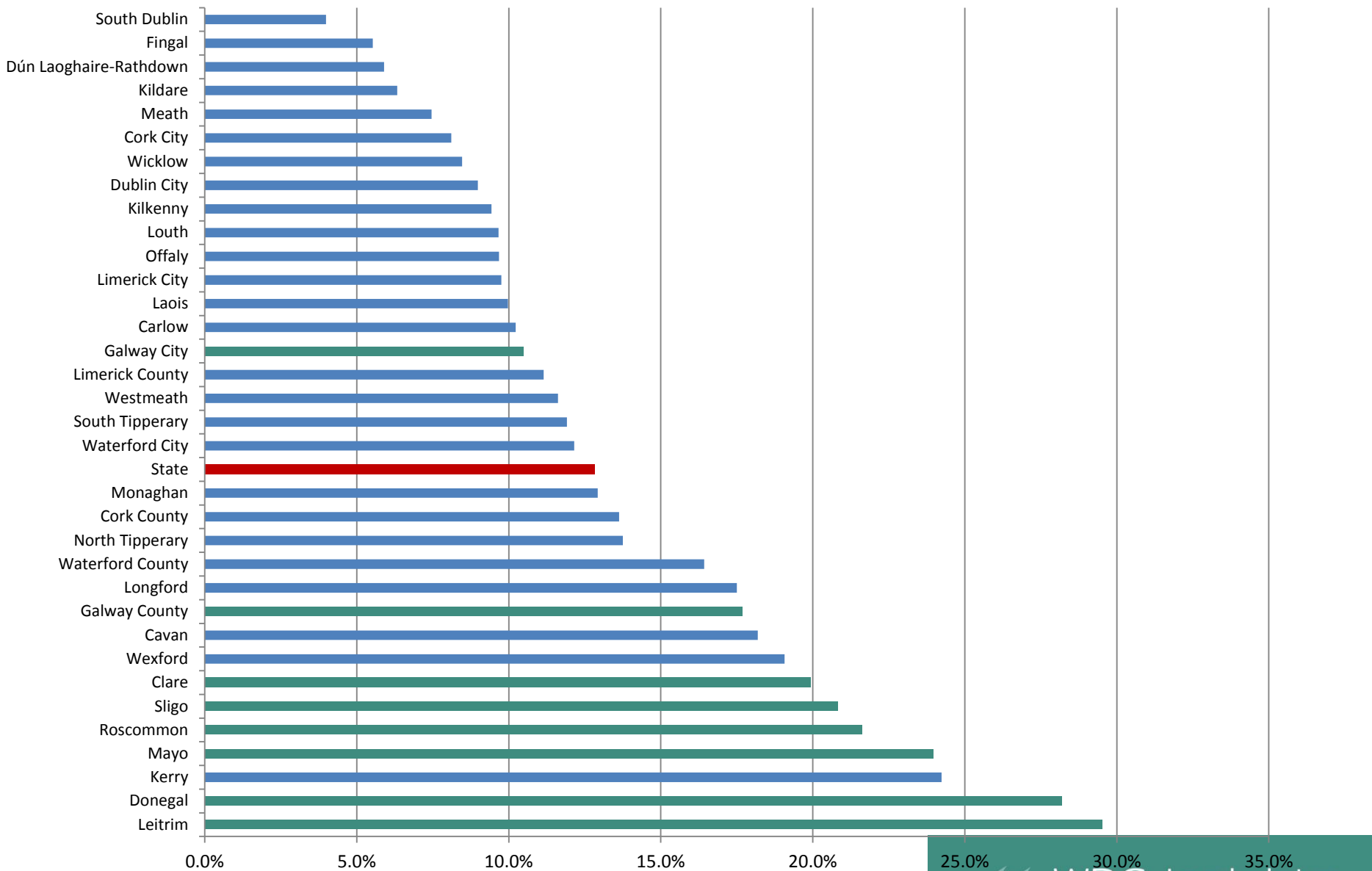
Housing

- 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 (0.8%), 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%.

Vacancy rates 2011 and 2016



Vacant dwellings as percentage of total housing stock, 2016



Conclusion

- Worrying decline in population in 3 counties
- More than half of the EDs in the WR had population decline
- Out migration a significant issue (esp. male migration)
- More detailed information in the report circulated.
- Policy Team will analyse comprehensive census results as they become available. (Different themes will be released April-December 2017).

Forthcoming Census 2016 Results

- **Census 2016 Summary Results – Part 1** 06 April 2017
- **Profile 1 – Housing in Ireland** 20 April 2017
- **Profile 2 – Population Distribution and Movements** 11 May 2017
- **Census 2016 Summary Results – Part 2** 15 June 2017
- **Profile 3 – An Age Profile of Ireland** 06 July 2017
- **Small Area Population Statistics (SAPS) – All variables** 20 July 2017
- **POWSCAR – Research microdata file** 20 July 2017
- **Profile 4 – Households and Families** 27 July 2017
- **Profile 5 – Homeless Persons in Ireland** 10 August 2017
- **Profile 6 – Commuting in Ireland** 31 August 2017
- **Profile 7 – Migration and Diversity** 21 September 2017
- **Profile 8 – Irish Travellers, Ethnicity and Religion** 12 October 2017
- **Profile 9 – Health, Disability and Carers** 2 November 2017
- **Profile 10 – Education, Skills and the Irish Language** 23 November 2017
- **Profile 11 – Employment, Occupations and Industry**

LABOUR MARKET

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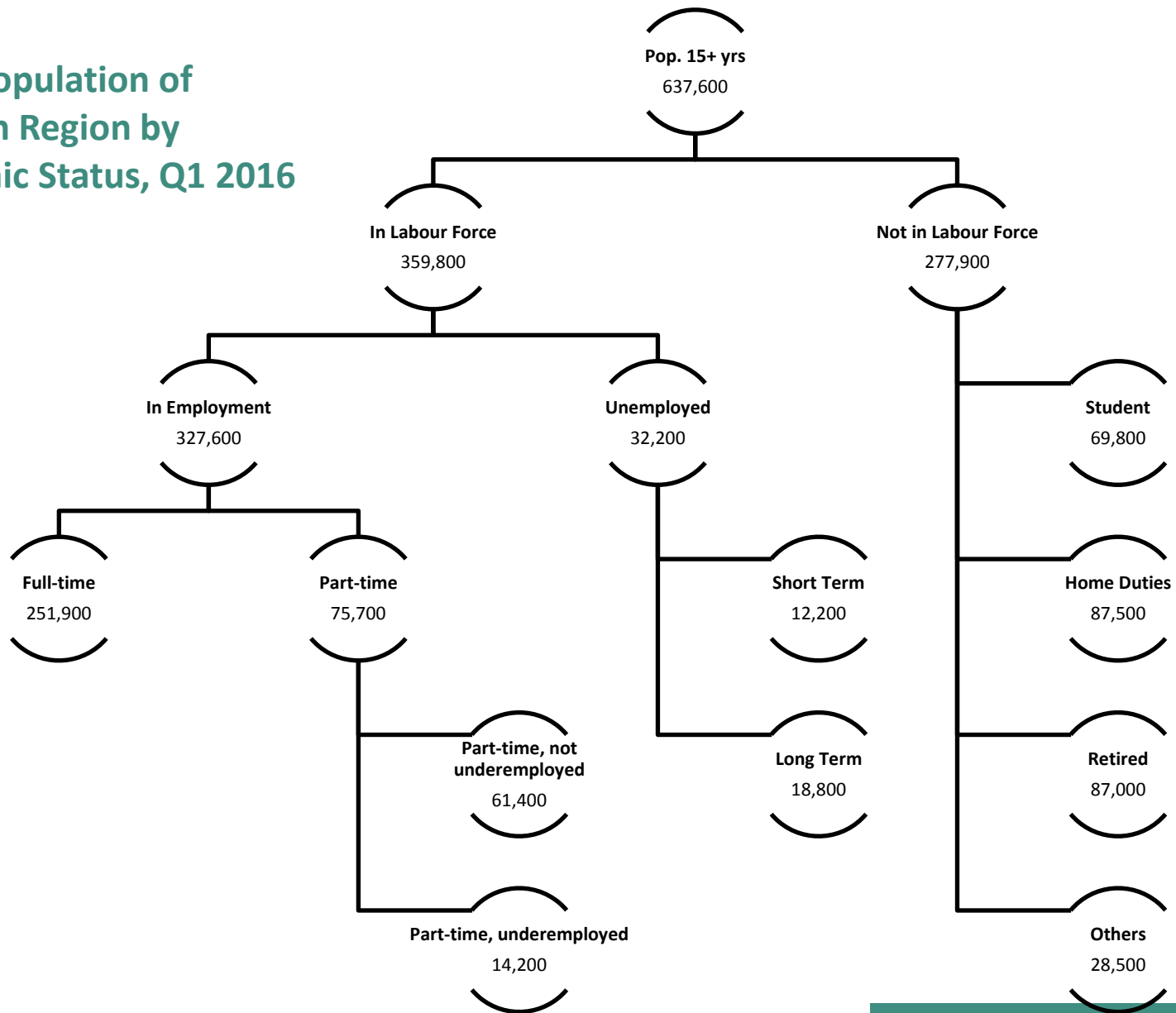
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CSO, Quarterly National Household Survey

- Quarter 1
- Special run for the Western Region (Connacht + Donegal + Clare)
- Comparing Western Region (WR) with Rest of State (RoS) which is all other counties combined
- No county data
- Sample based

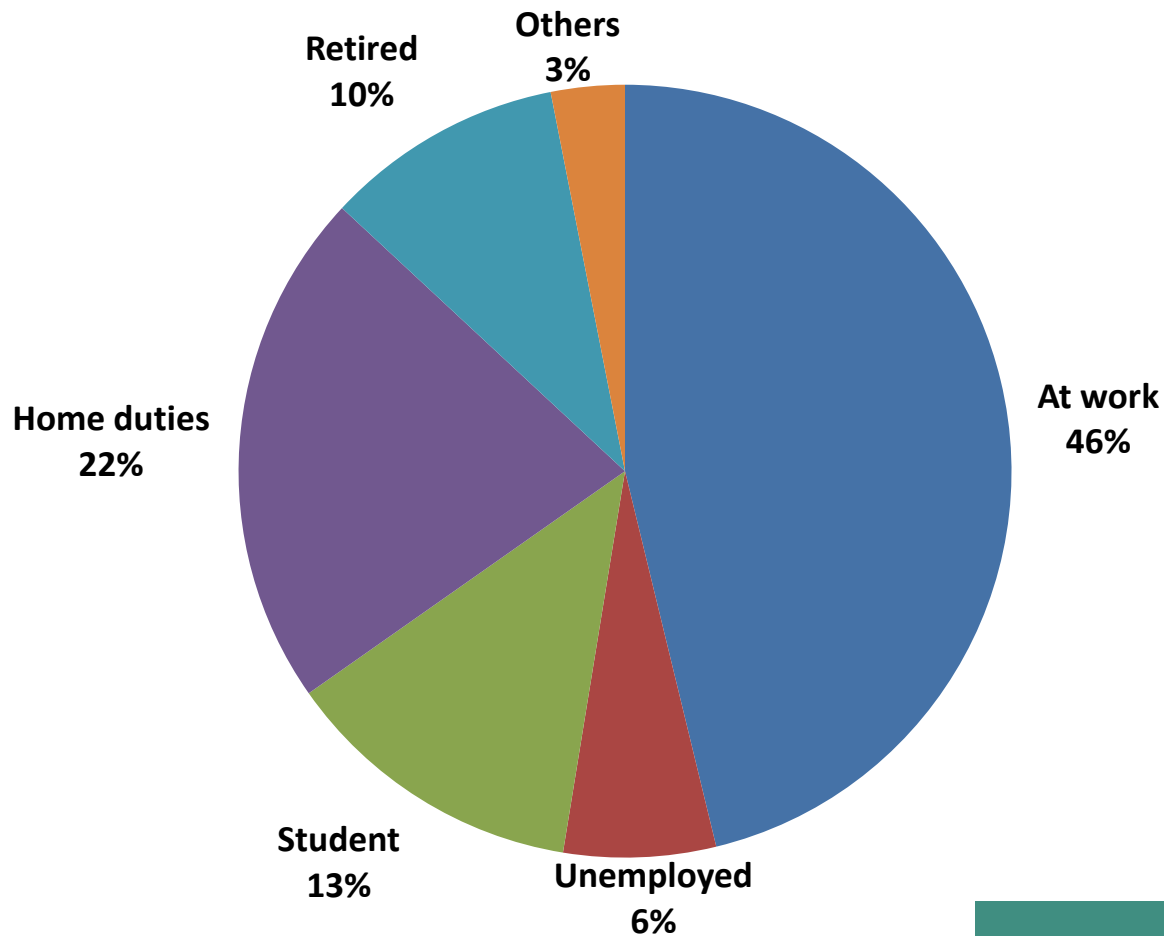
Adult Population of Western Region by Economic Status, Q1 2016



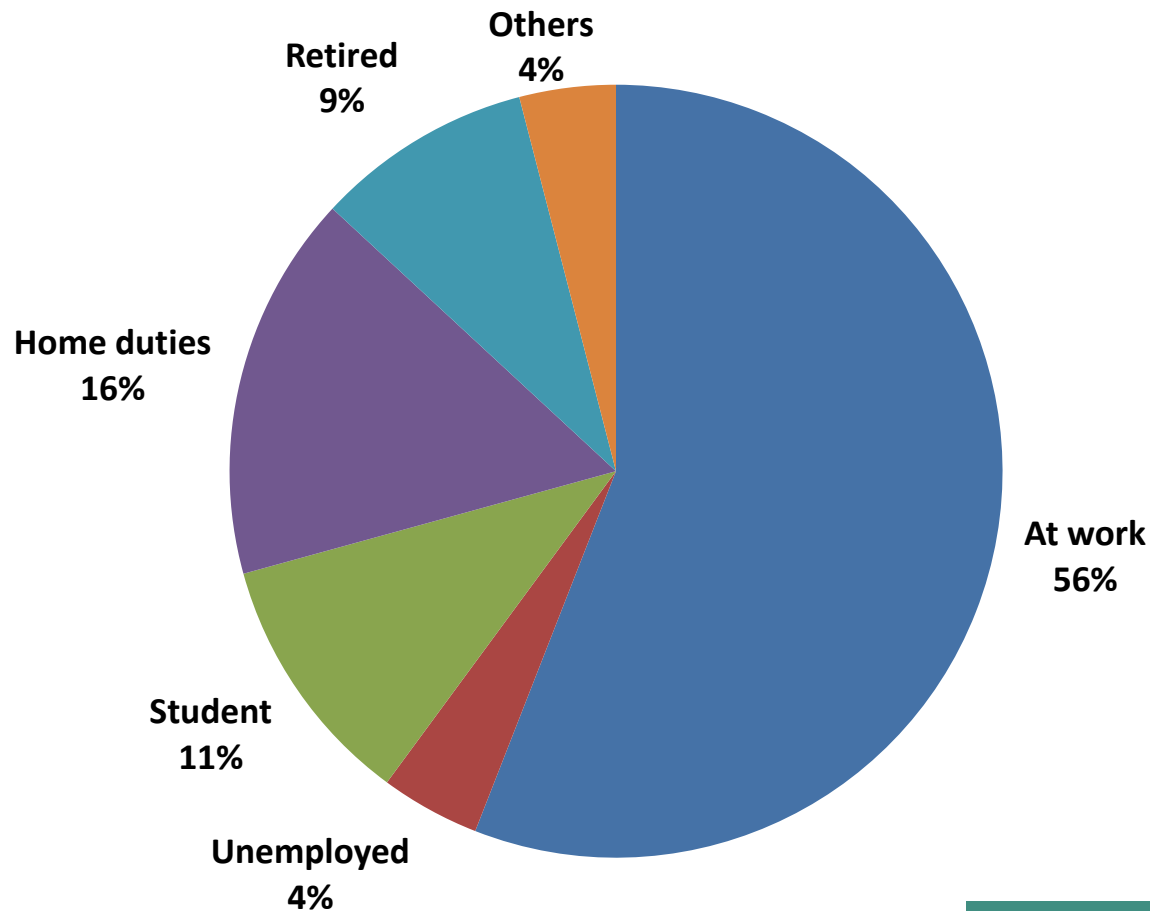
Changing pattern of economic status

- Share of adult population 'at work' grew through boom, then declined. Now about half of adult pop.
- Unemployment share now similar to 1998
- Share of population 'Retired' has increased substantially:
 - +60.8% in WR v +48.5% in RoS (2007-2016)
- No. of students grew strongly in response to crisis. Some decline but still higher than '07
- 'Home duties' declining with rising female participation

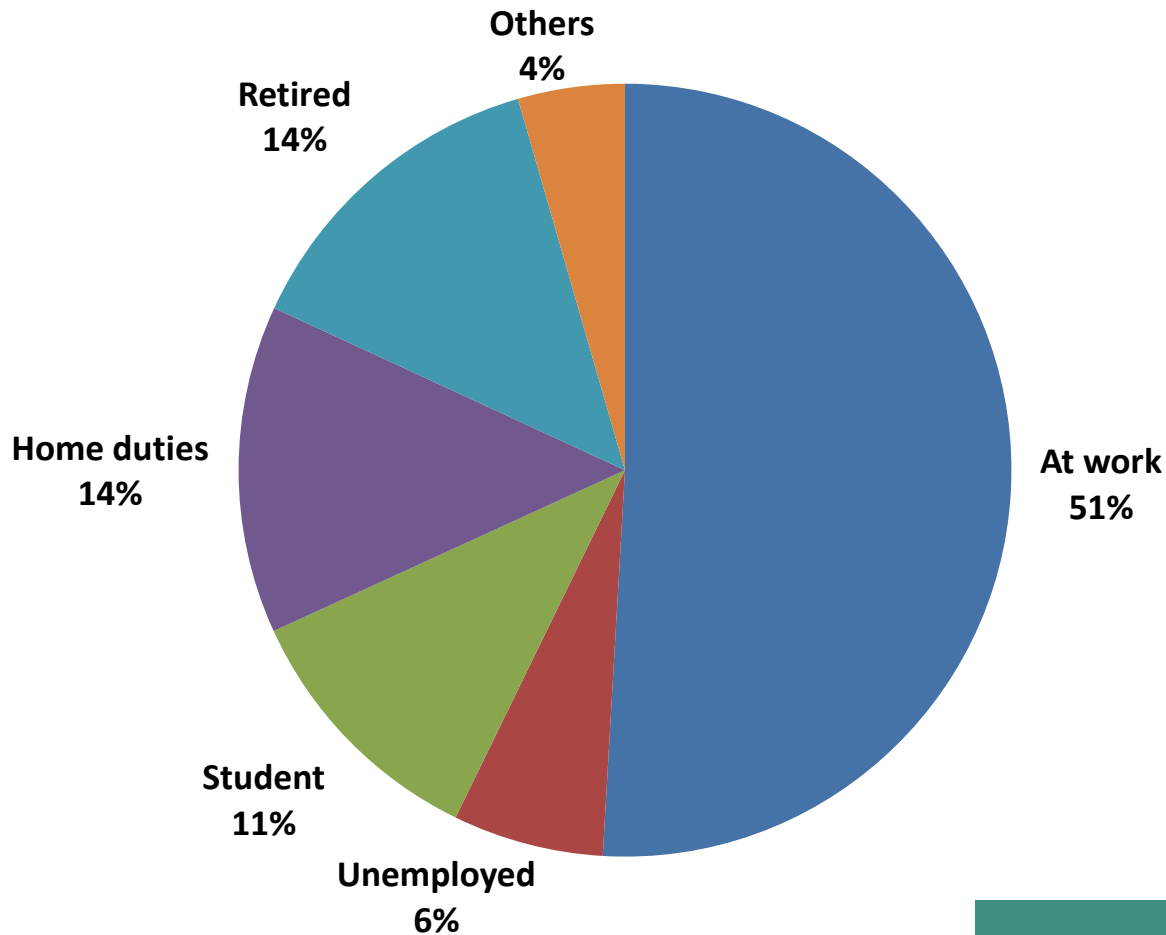
Principal Economic Status in Western Region, 1998



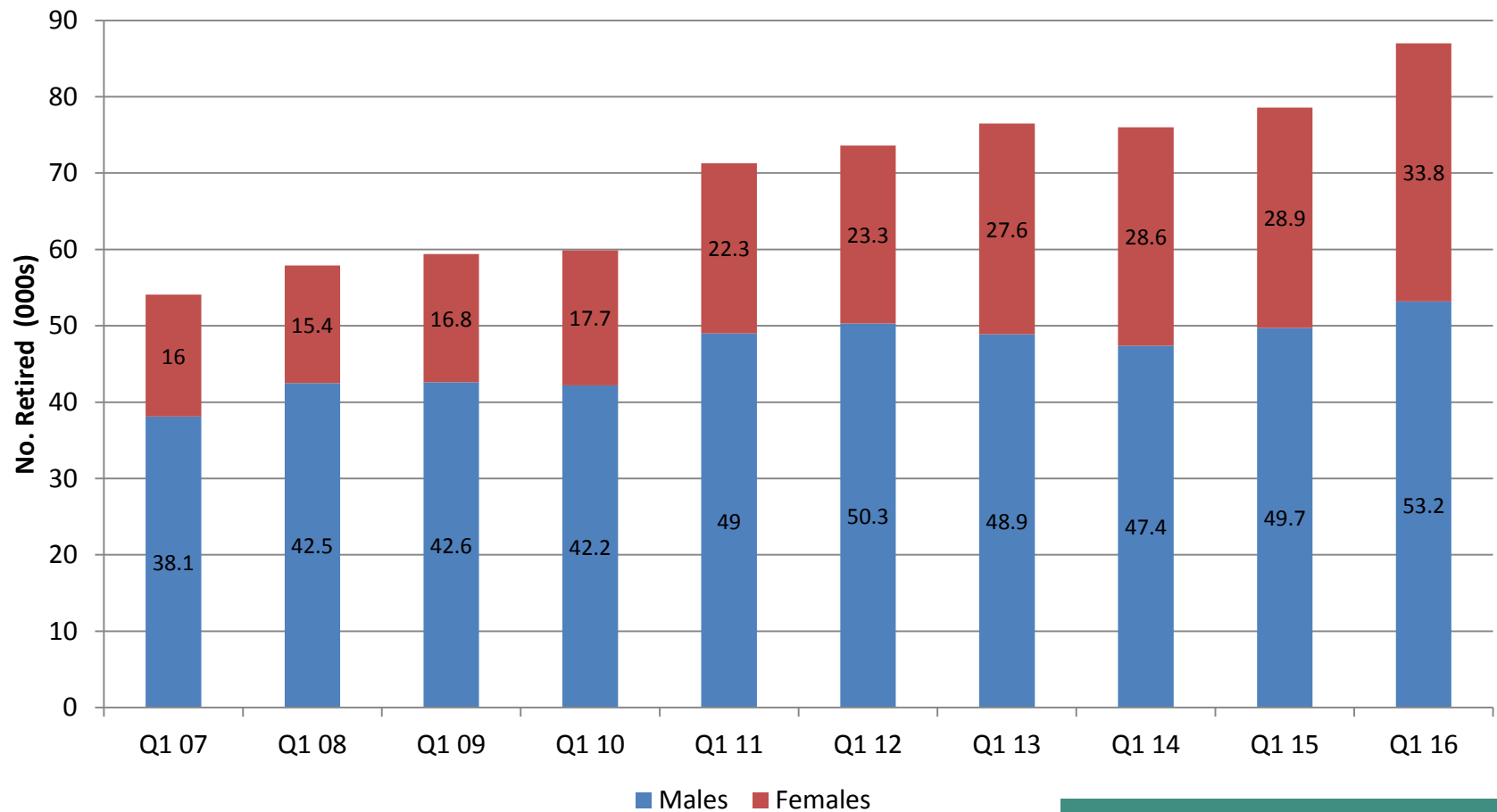
Principal Economic Status in Western Region, 2007



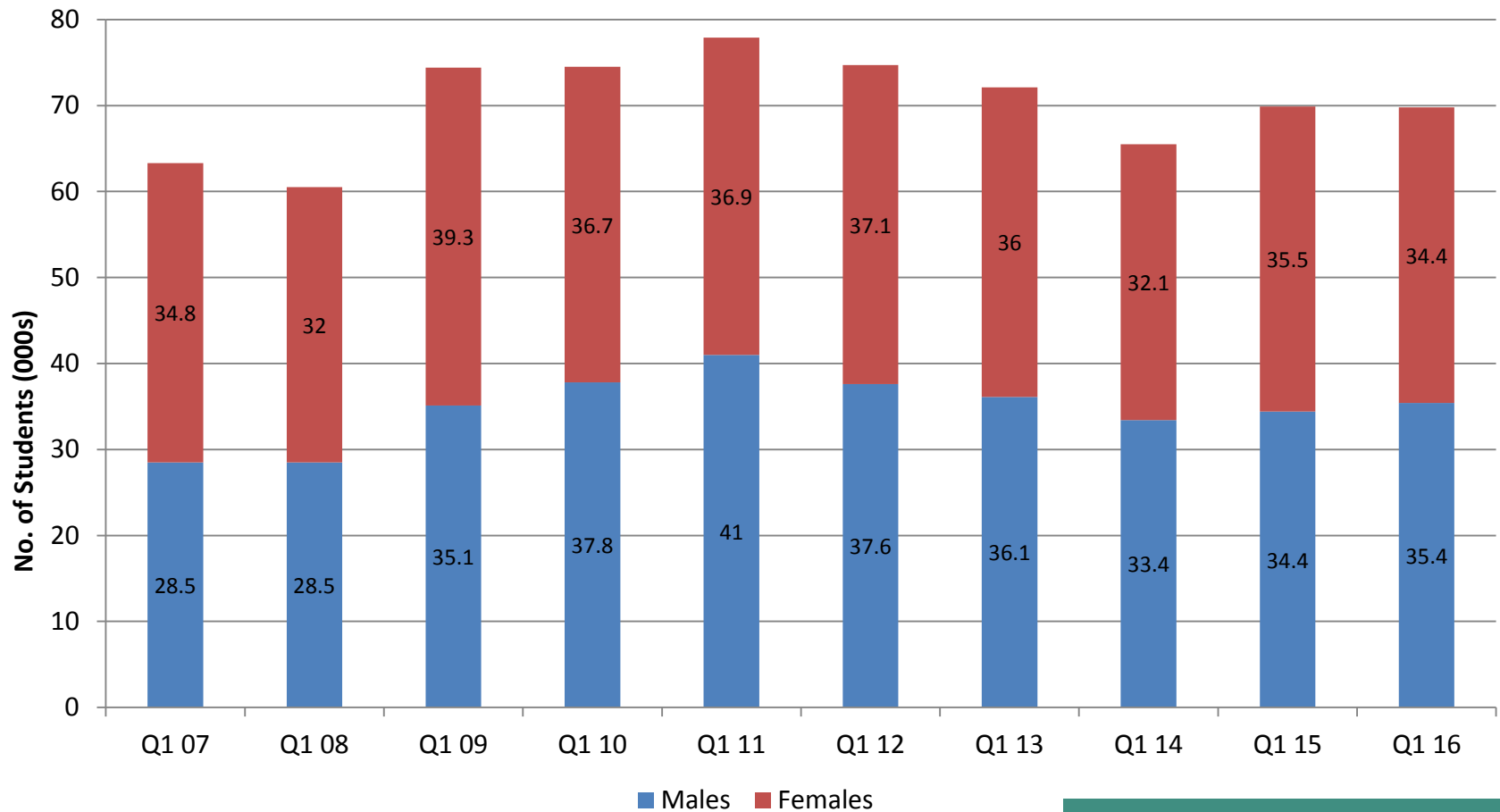
Principal Economic Status in Western Region, 2016



No. retired in Western Region by gender, 2007-2016



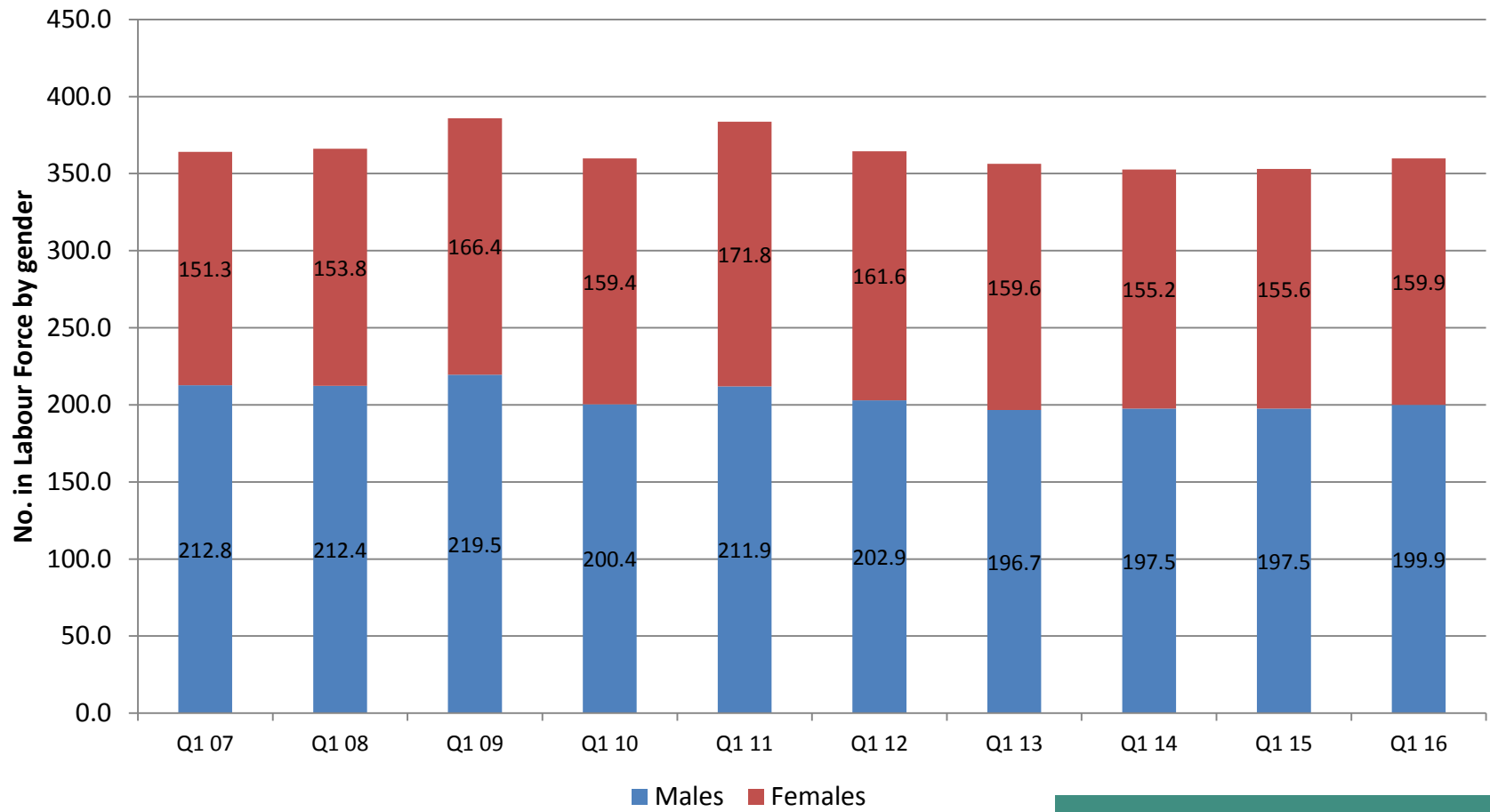
No. of students (15+ yrs) in Western Region by gender, 2007-2016



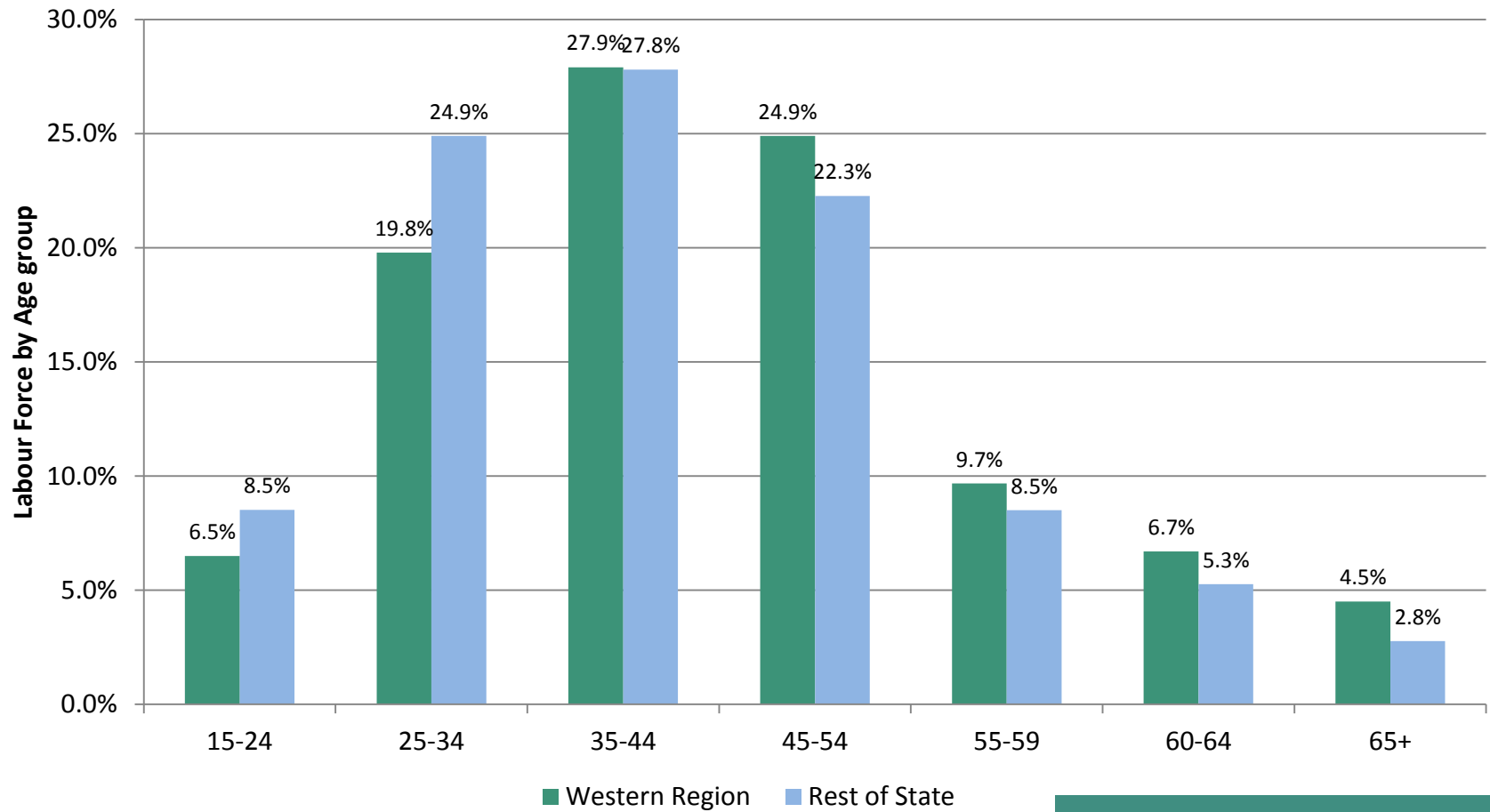
Lower participation in the labour force across gender & age, esp. youth

- WR labour force declined marginally (-1.2%) since 2007; male fell -6.1% & female rose +5.7%
- **Lower share of labour force in WR is under 35yrs & higher share over 44yrs**
- Participation in the labour force consistently lower in WR for men & women
- Similar gender gap in WR (14.8) & RoS (14.3)
- Participation declining in WR in recent years
- WR has lower participation in all age groups except 65+
- Participation by young people (15-24) far lower in WR & difference growing

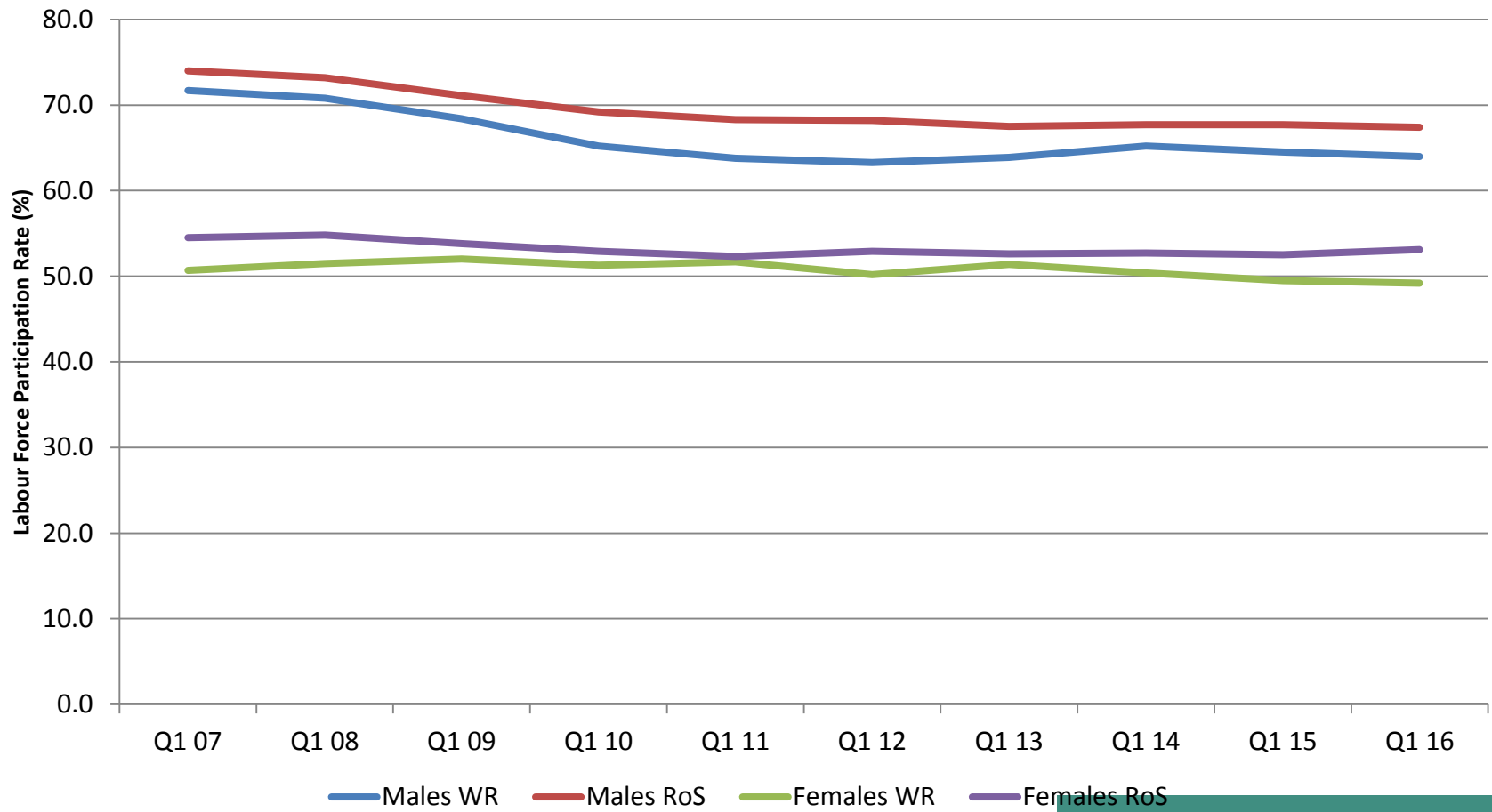
No of males & females in Western Region's labour force, 2007-2016



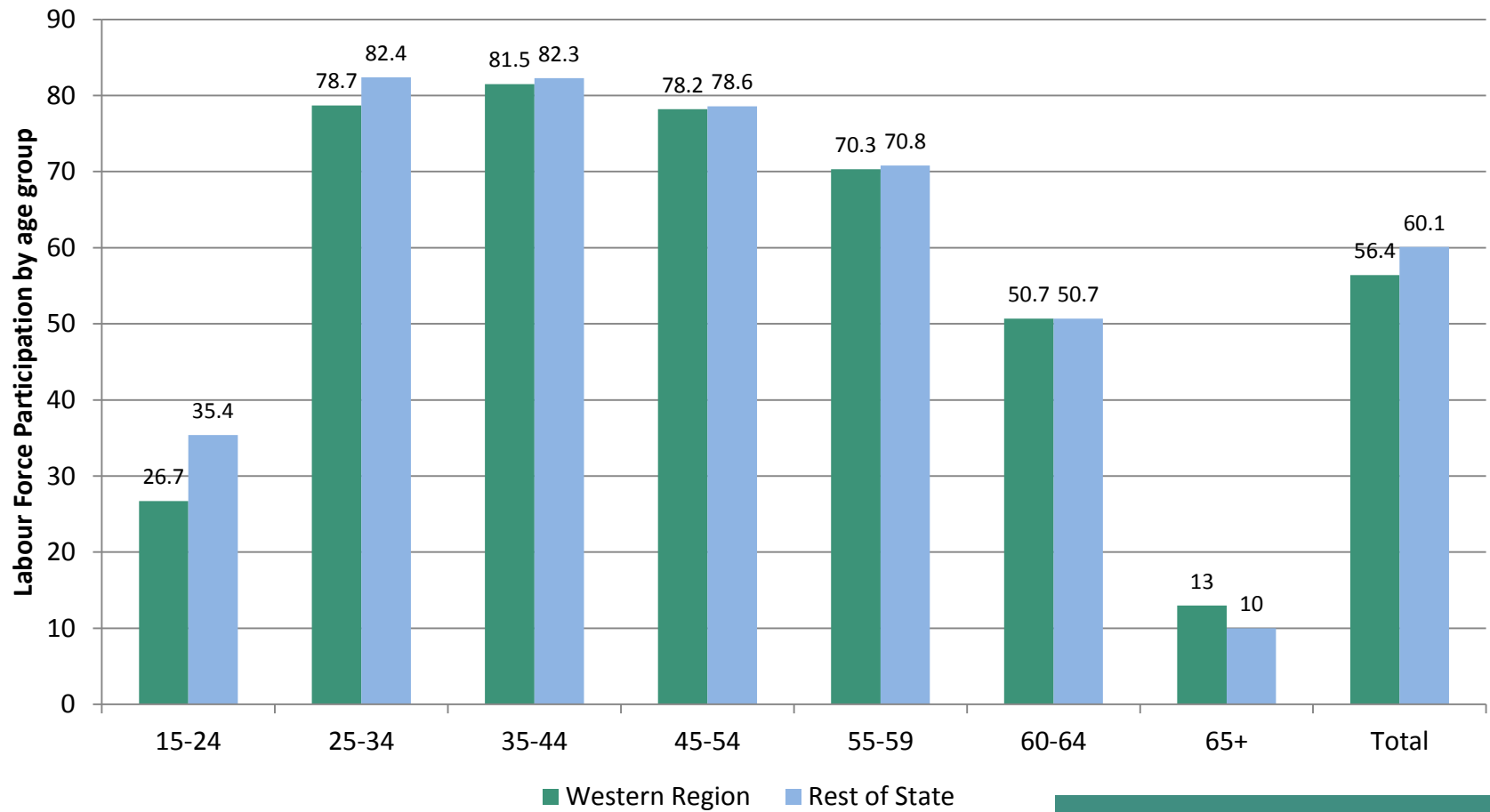
% of labour force by age group in Western Region & Rest of State, 2016



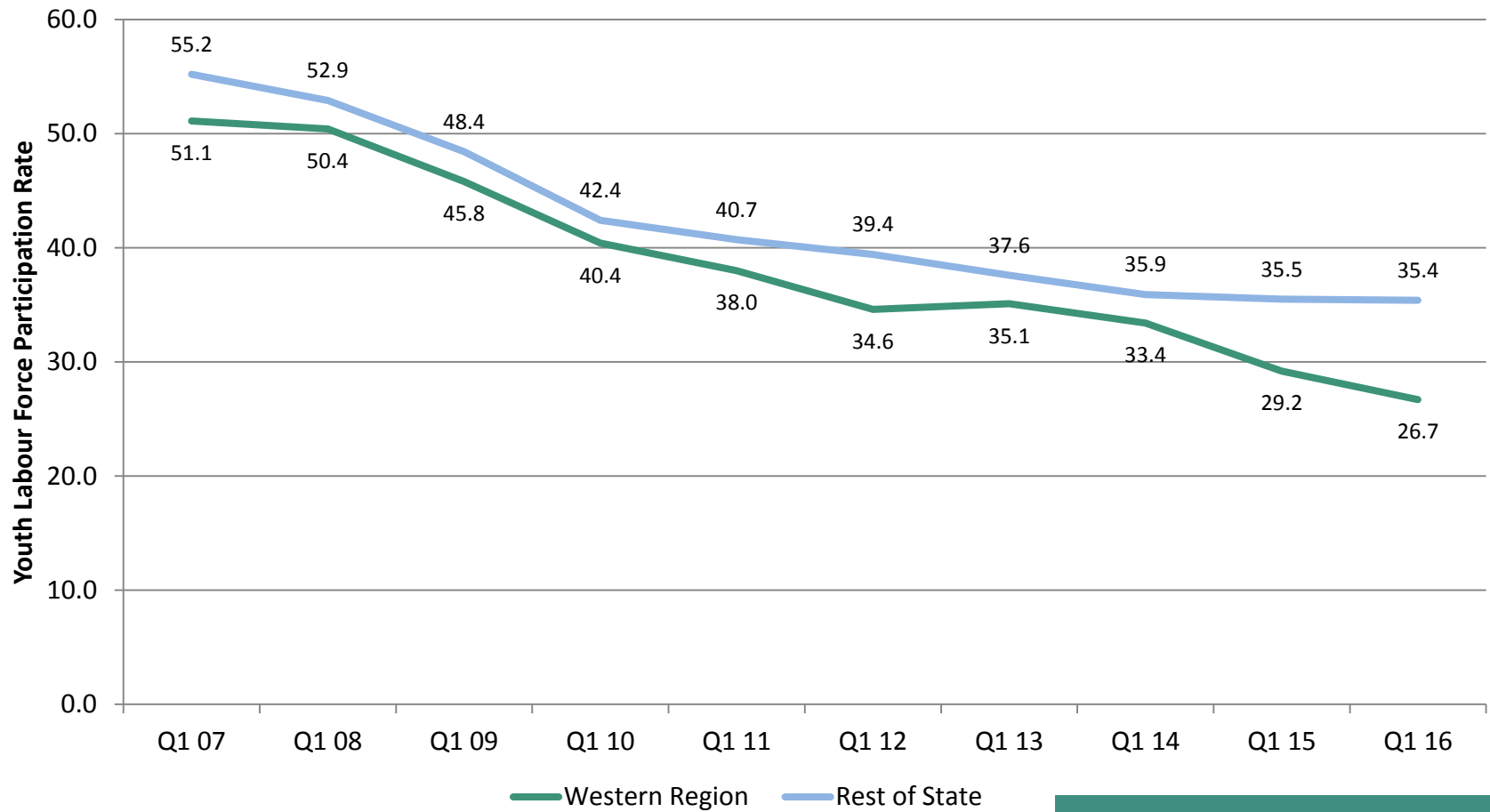
Labour force participation rates by gender in Western Region & Rest of State, 2007-2016



Labour force participation rates by age group in Western Region & Rest of State, 2016



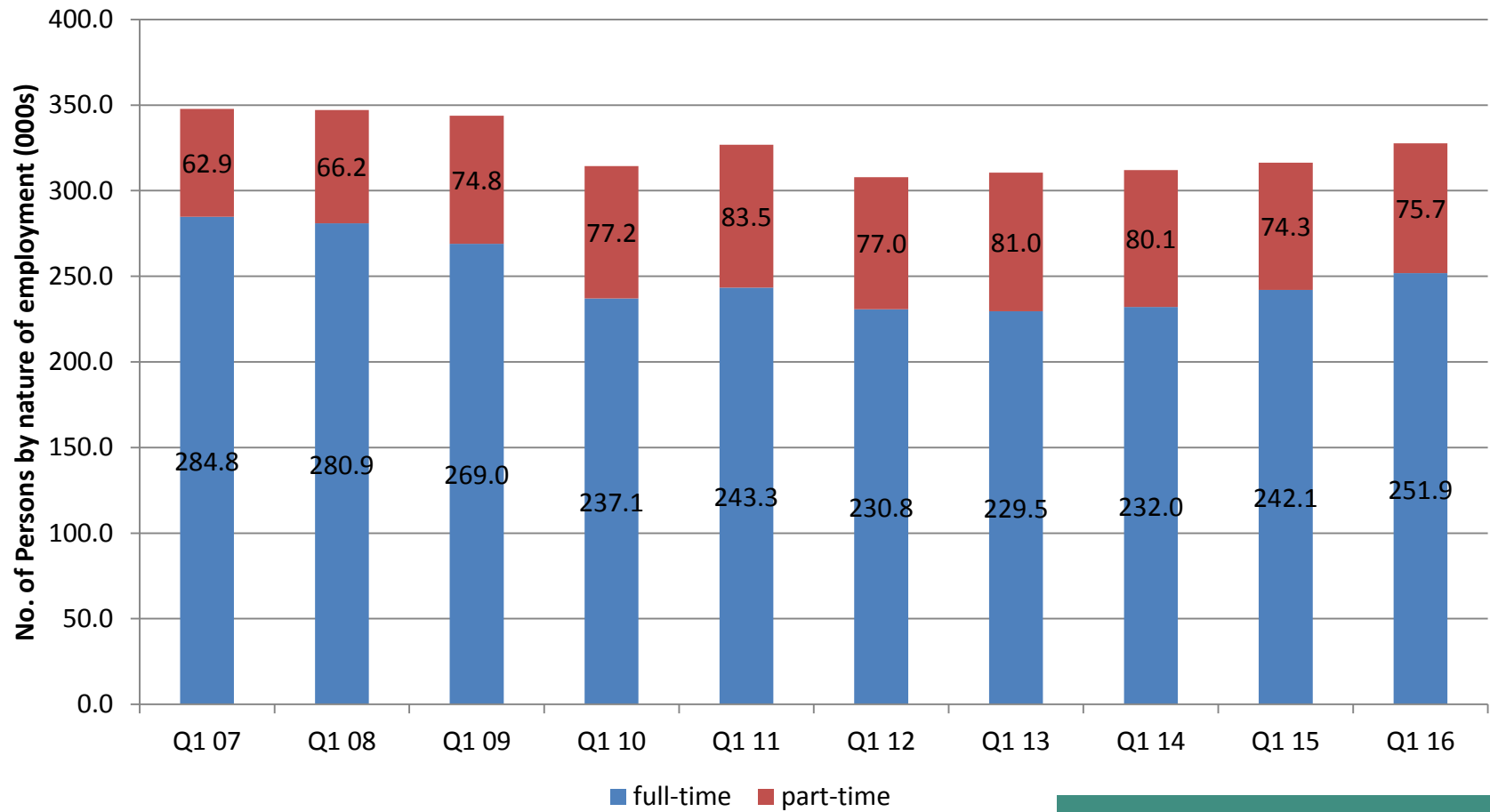
Youth labour force participation rates in Western Region & Rest of State, 2007-2016



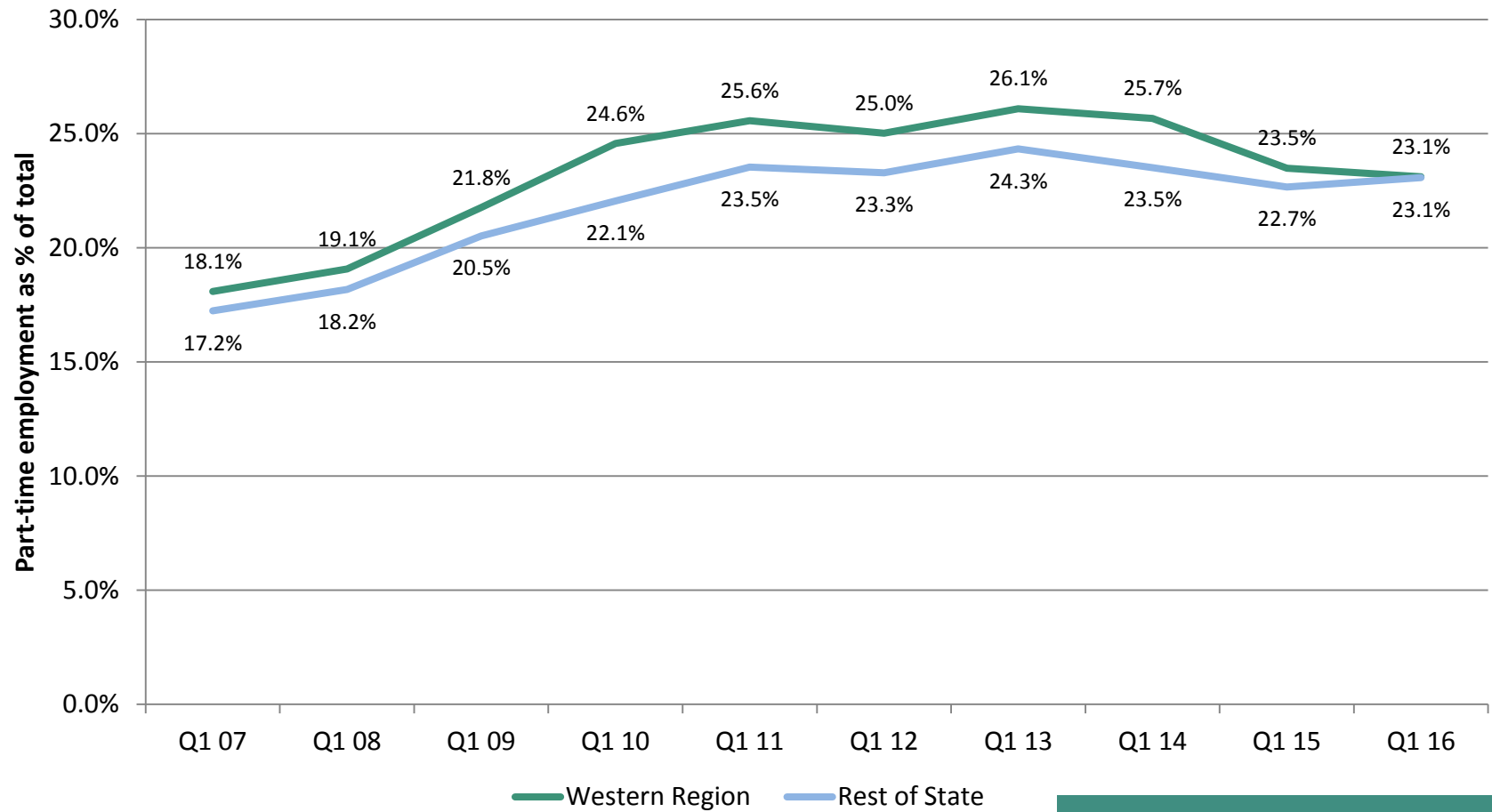
Total numbers 'at work' increasing, share of part-time working in WR converging with rest of country

- Total employment growing in region:
 - +3.5% WR v +2.2% RoS (2015-2016)
 - -5.8% WR v -6.5% RoS (2007-2016)
- 2007-2011, full-time employment fell in each year & part-time grew
- Long-term trend of more part-time working in WR, but in 2016 same as RoS
- Part-time underemployment declining since 2013

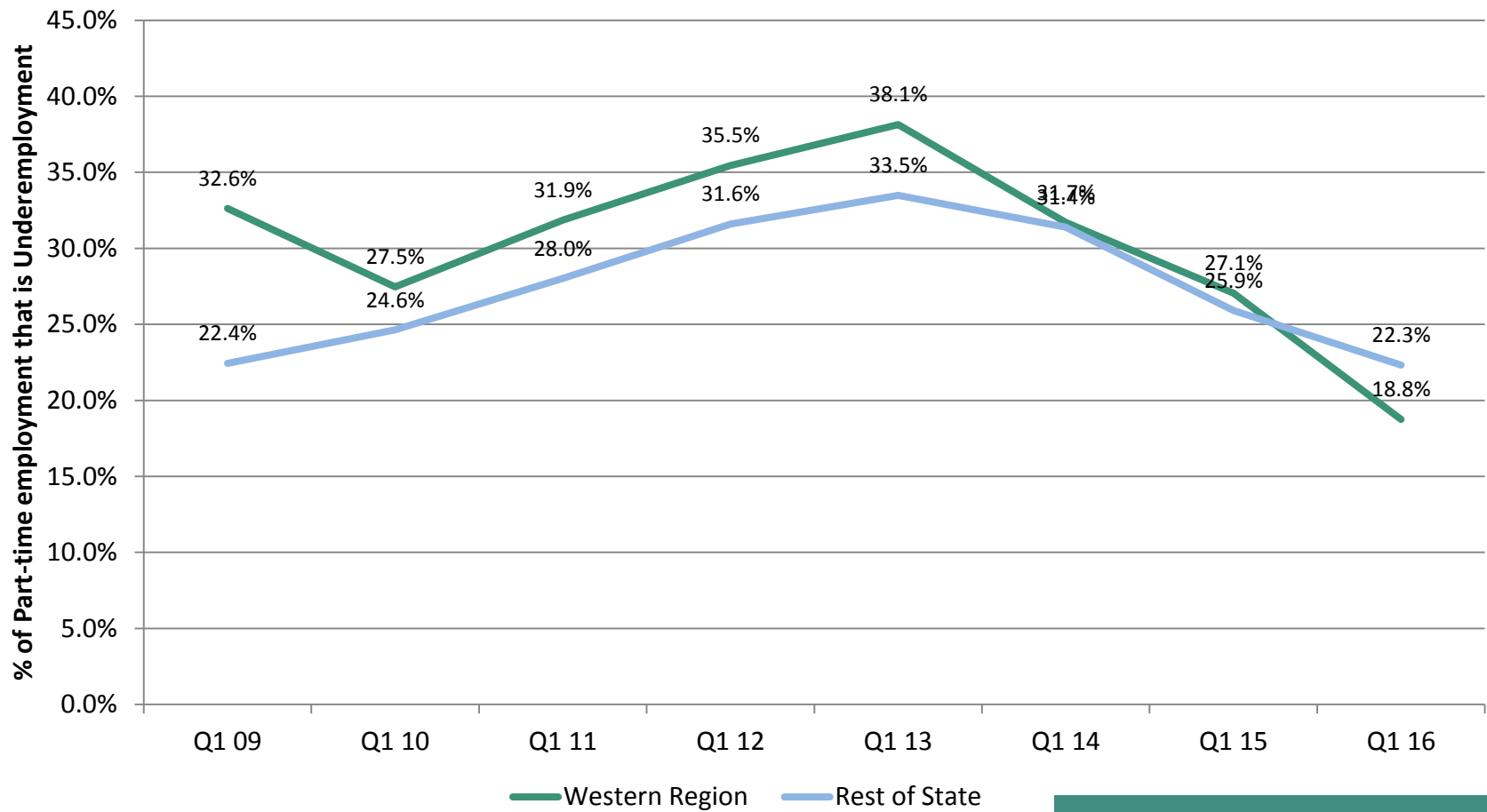
No. in employment by type of employment in Western Region, 2007-2016



Part-time employment as % of total employment, Western Region & Rest of State, 2007-2016



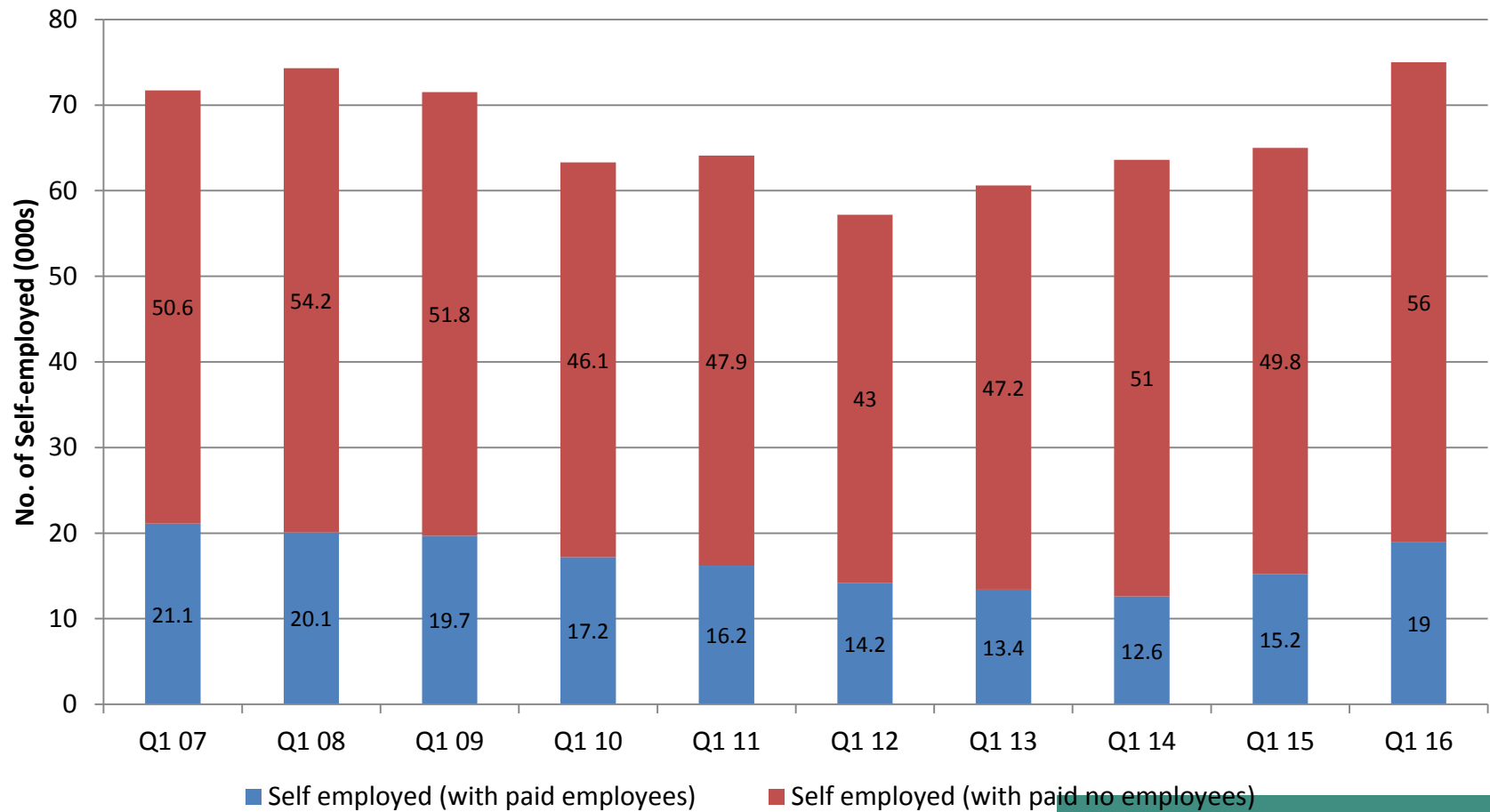
Part-time underemployment as % of total part-time employment, 2009-2016



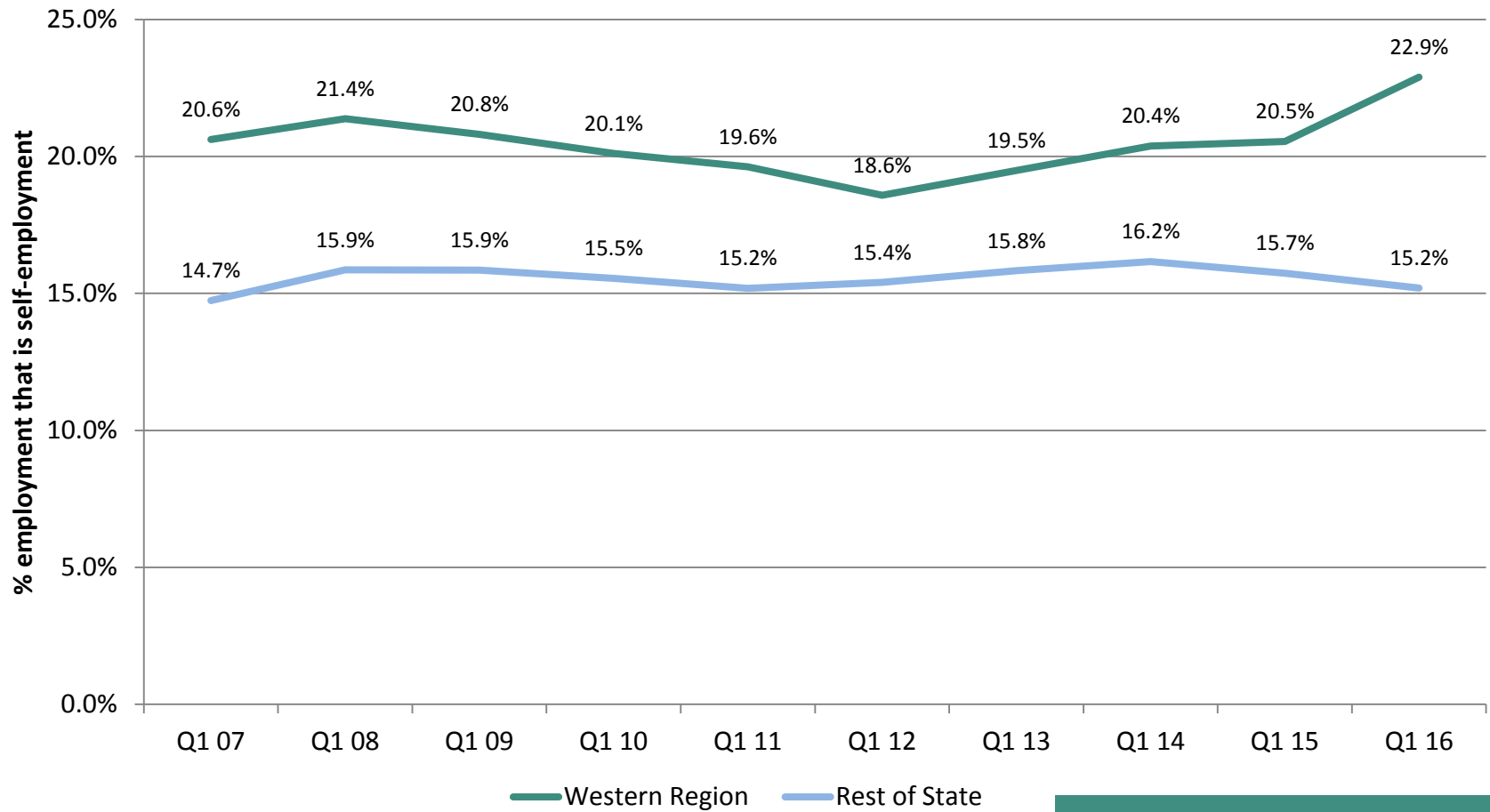
Very strong growth of self-employment in Western Region

- Self-employment (2012-2016)
 - +31.1% WR v +7.2% RoS (Total)
 - +33.8% WR v -4.8% RoS (with employees)
 - +30.2% WR v +13.2% RoS (with no employees)
- Self-employment becoming increasingly important in WR
- Share of male employment that is self-employment declining in RoS, but growing in WR
- Female self-employment growing strongly in WR since 2012

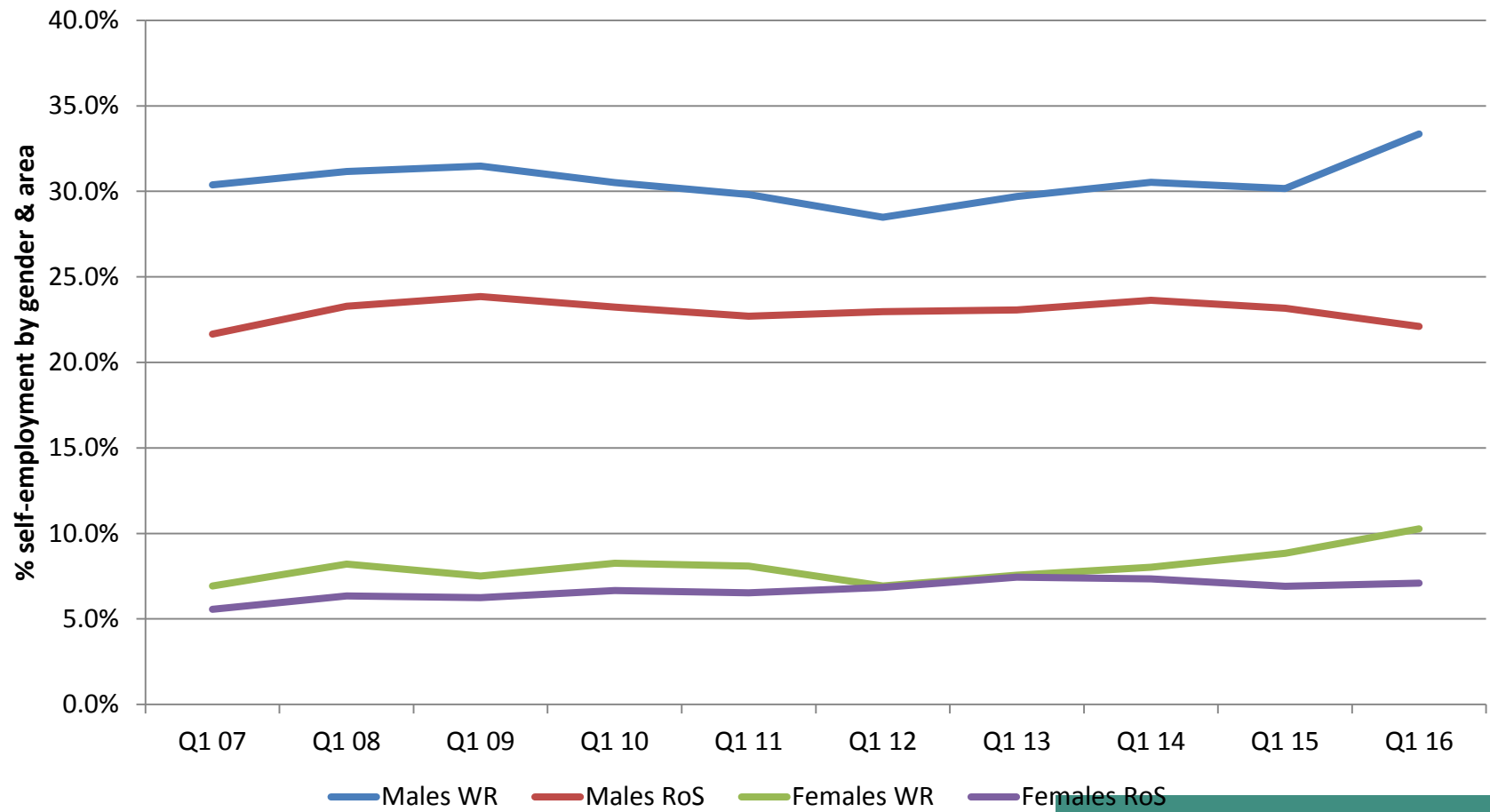
No. self-employed in Western Region, 2007-2016



% of employment that is self-employment in Western Region & Rest of State, 2007-2016



% of employment that is self-employment by gender in Western Region & Rest of State, 2007-2016

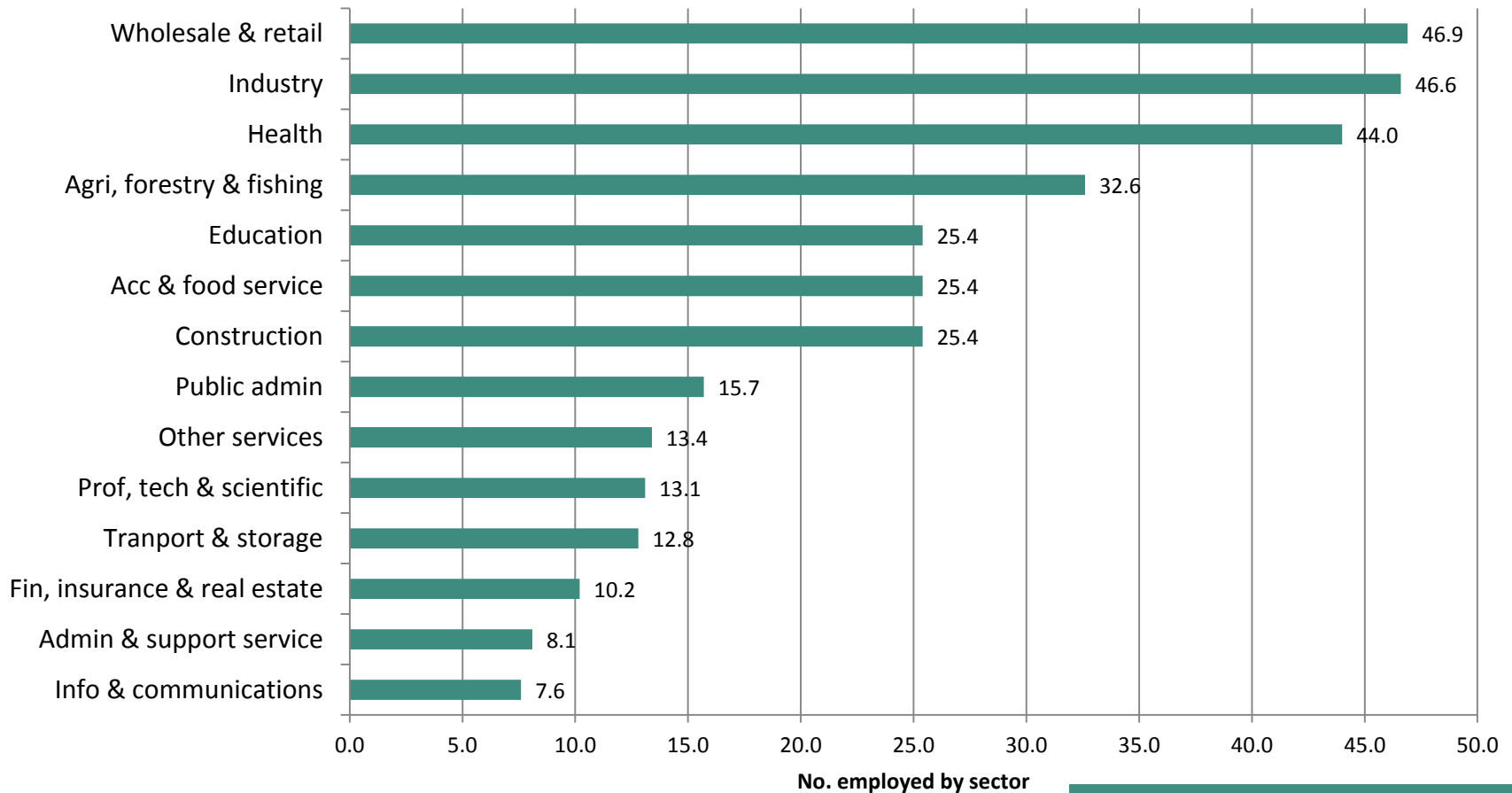


Higher share working in traditional & local services; jobs recovery less diversified

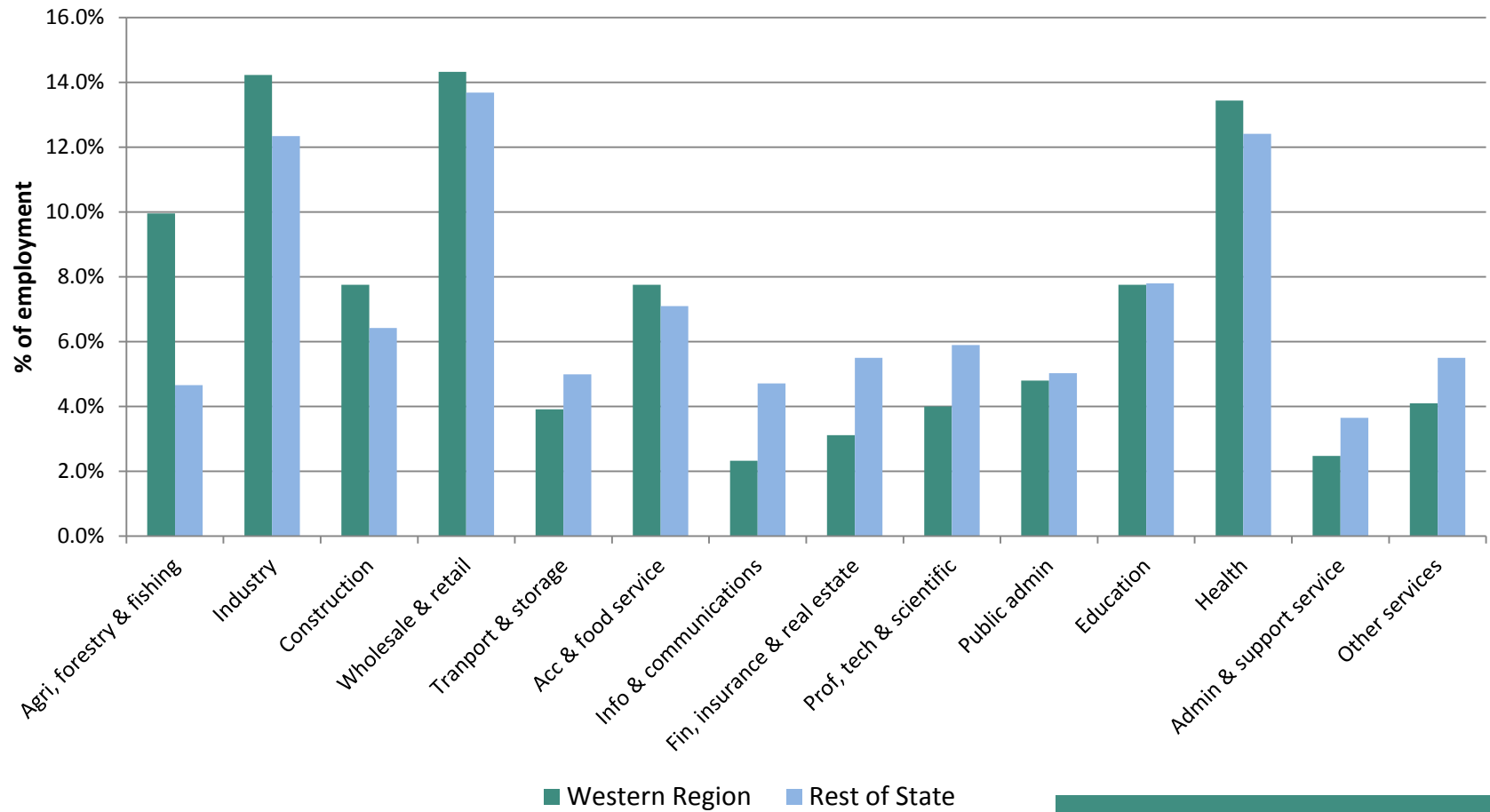
- Retail, Industry & Health largest employment sectors
- Knowledge services among smallest & far lower share working in these sectors
- Higher share working in traditional (Agri, Industry, Construction), local services (Retail, Accommodation) & Health
- Since 2012 WR had jobs decline in 7 out of 14 sectors. RoS only had decline in 1 out of 14
- Strongest growth in WR in Agri, Construction, Accommodation & Retail – link with self-emp
- **Jobs recovery not as diversified across economy as elsewhere, more concentrated in domestic sectors**



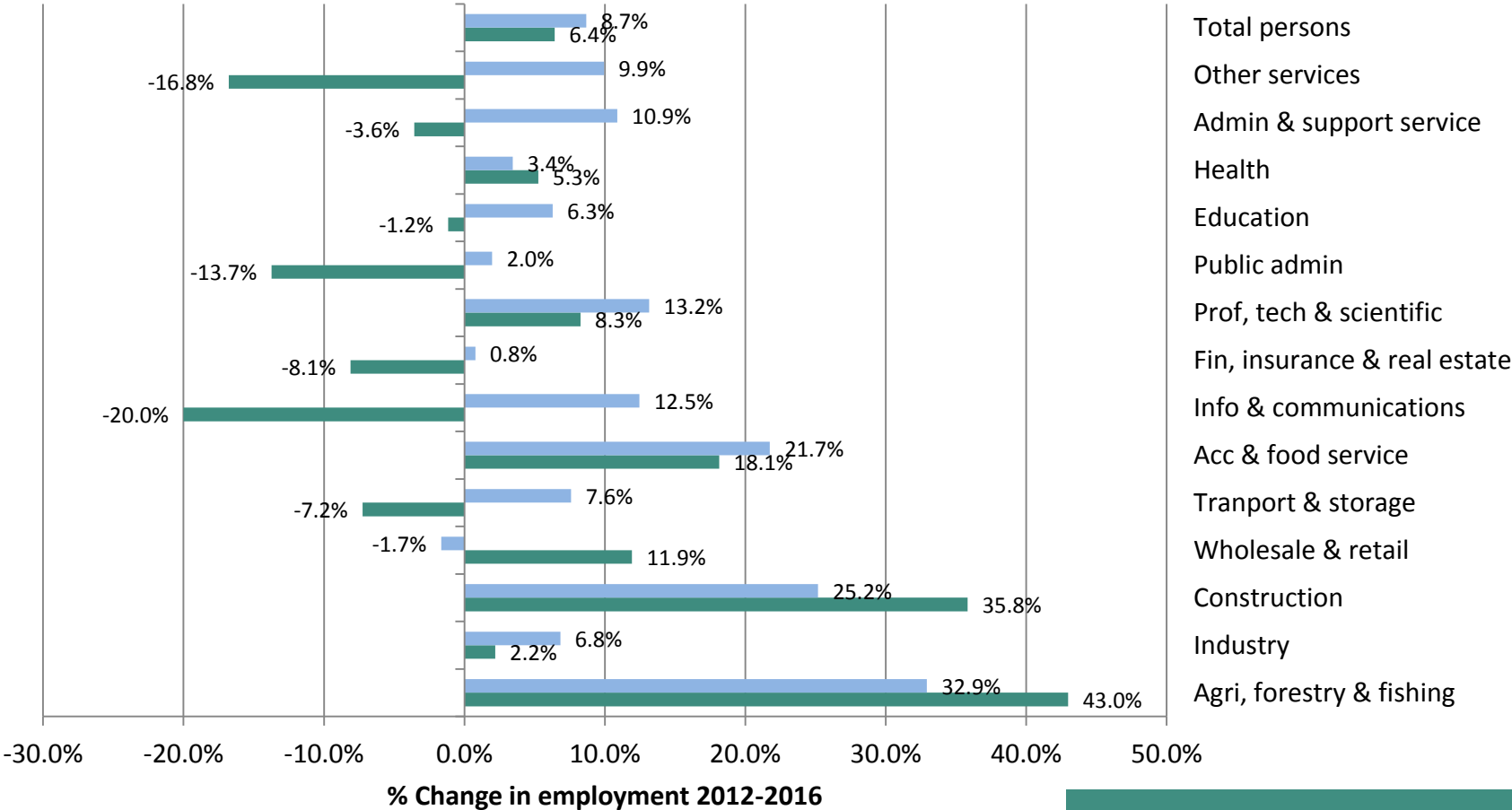
No. employed by economic sector in Western Region, 2016



% employed by sector in Western Region & Rest of State, 2016



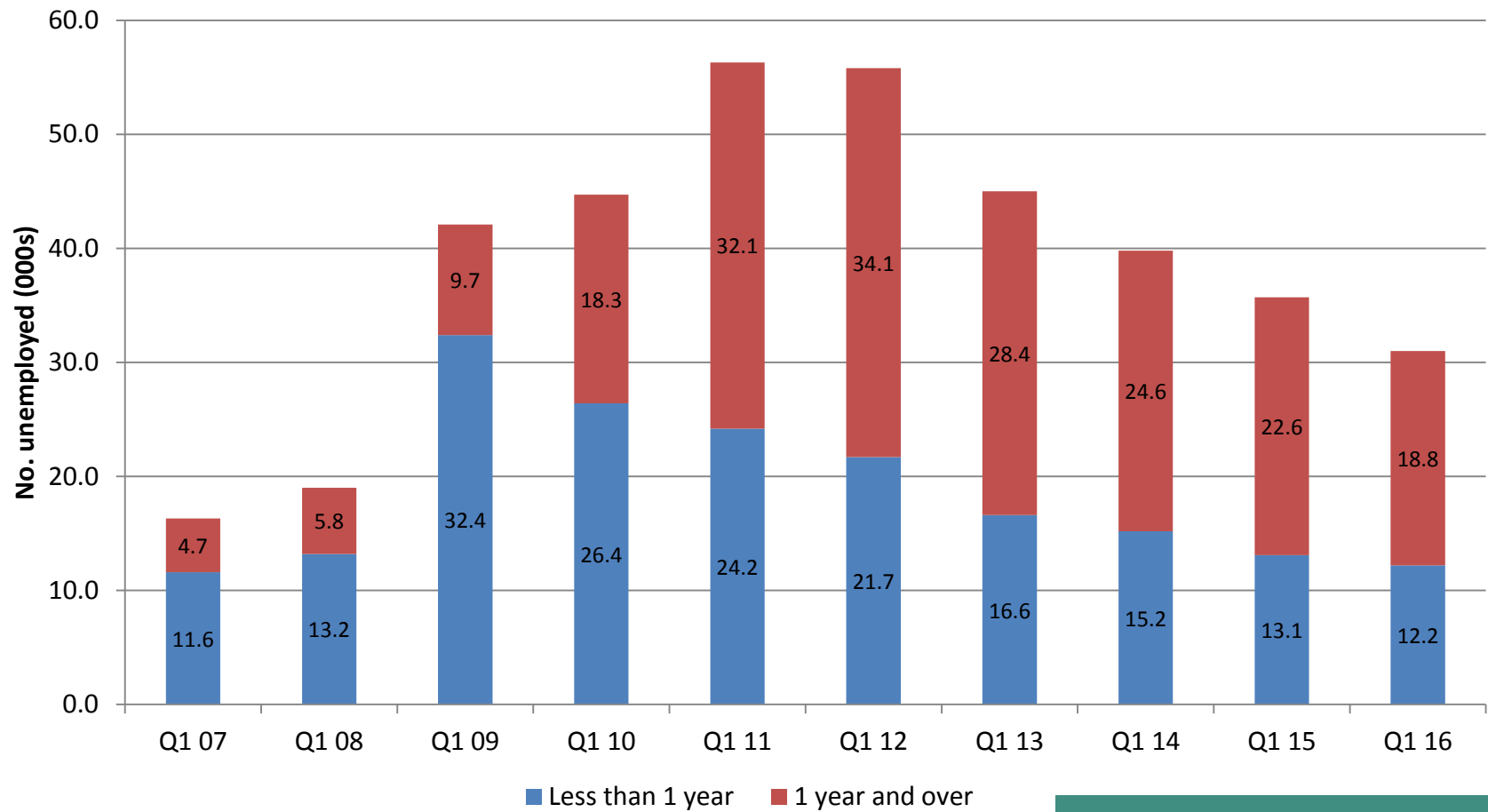
% change in employment by sector in Western Region & Rest of State, 2012-2016



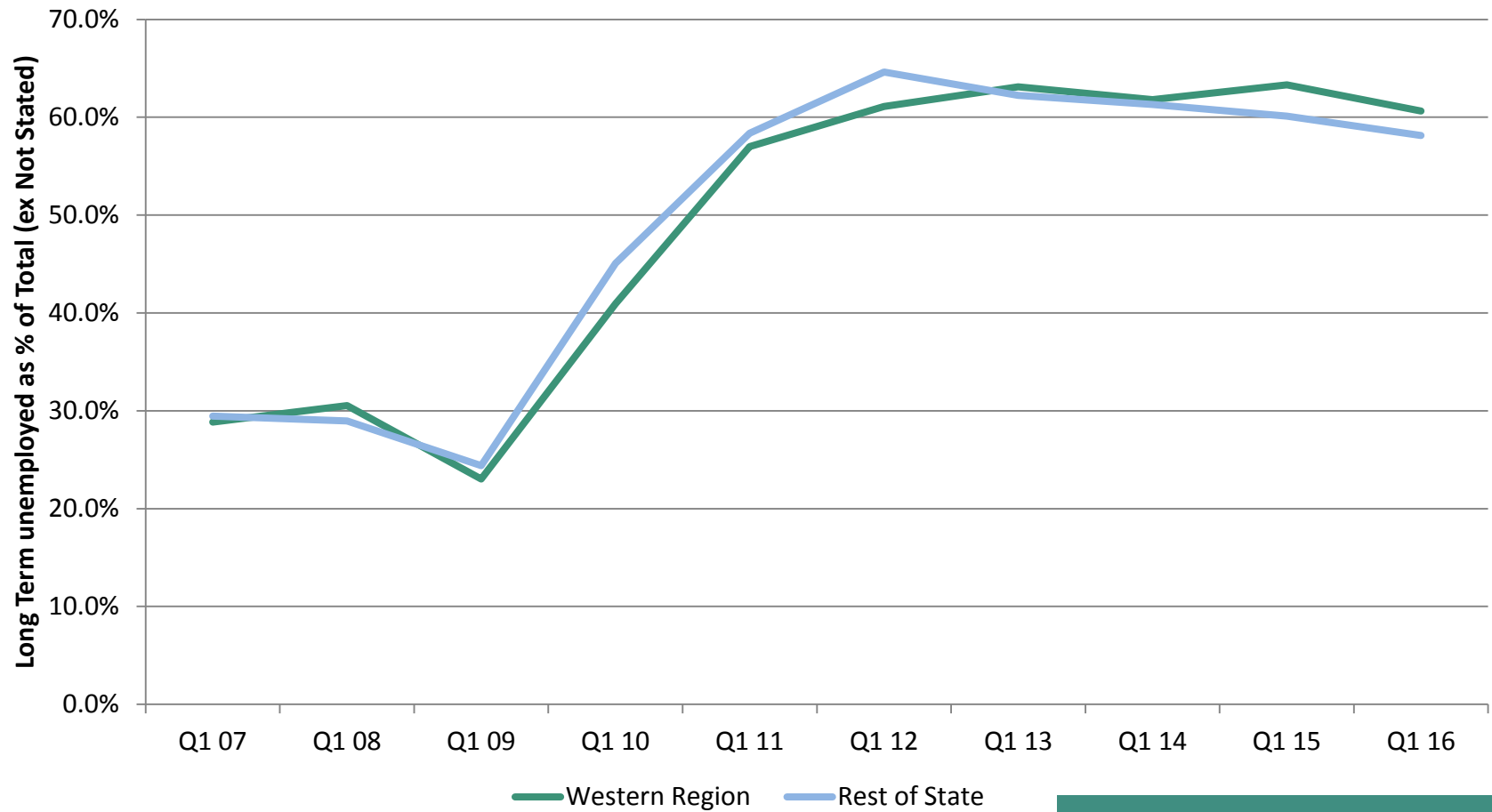
Unemployment declining but increasingly long-term; WR higher youth unemployment

- Unemployment numbers declining steadily, but share of long-term unemployment growing
- Unemployment & long-term unemployment rates declining, higher in WR
- WR has higher unemployment rate in all age groups except 65+ & 25-34
- WR has far higher youth unemployment, though gap narrowed in 2016

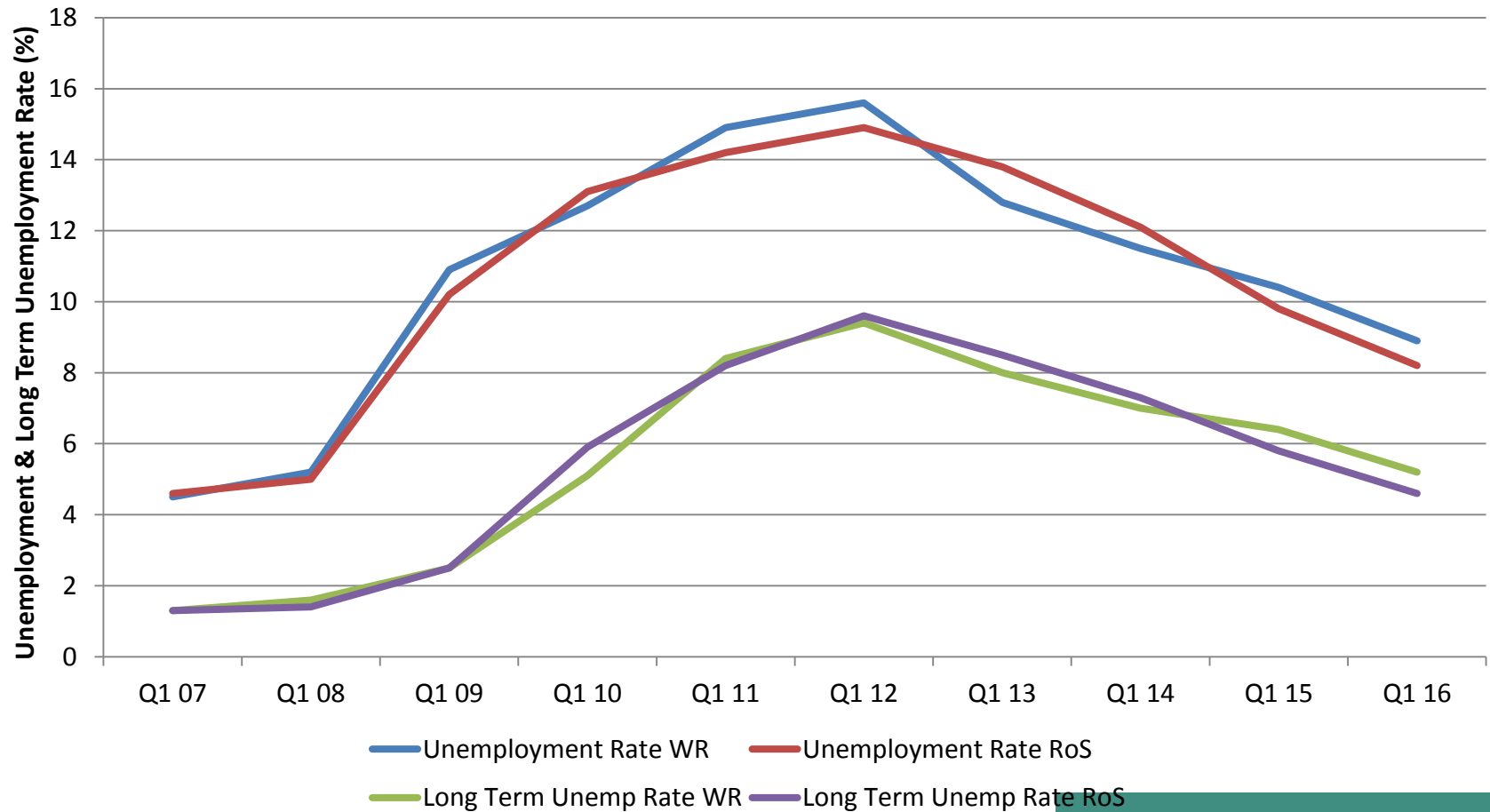
No. unemployed by duration in Western Region, 2007-2016



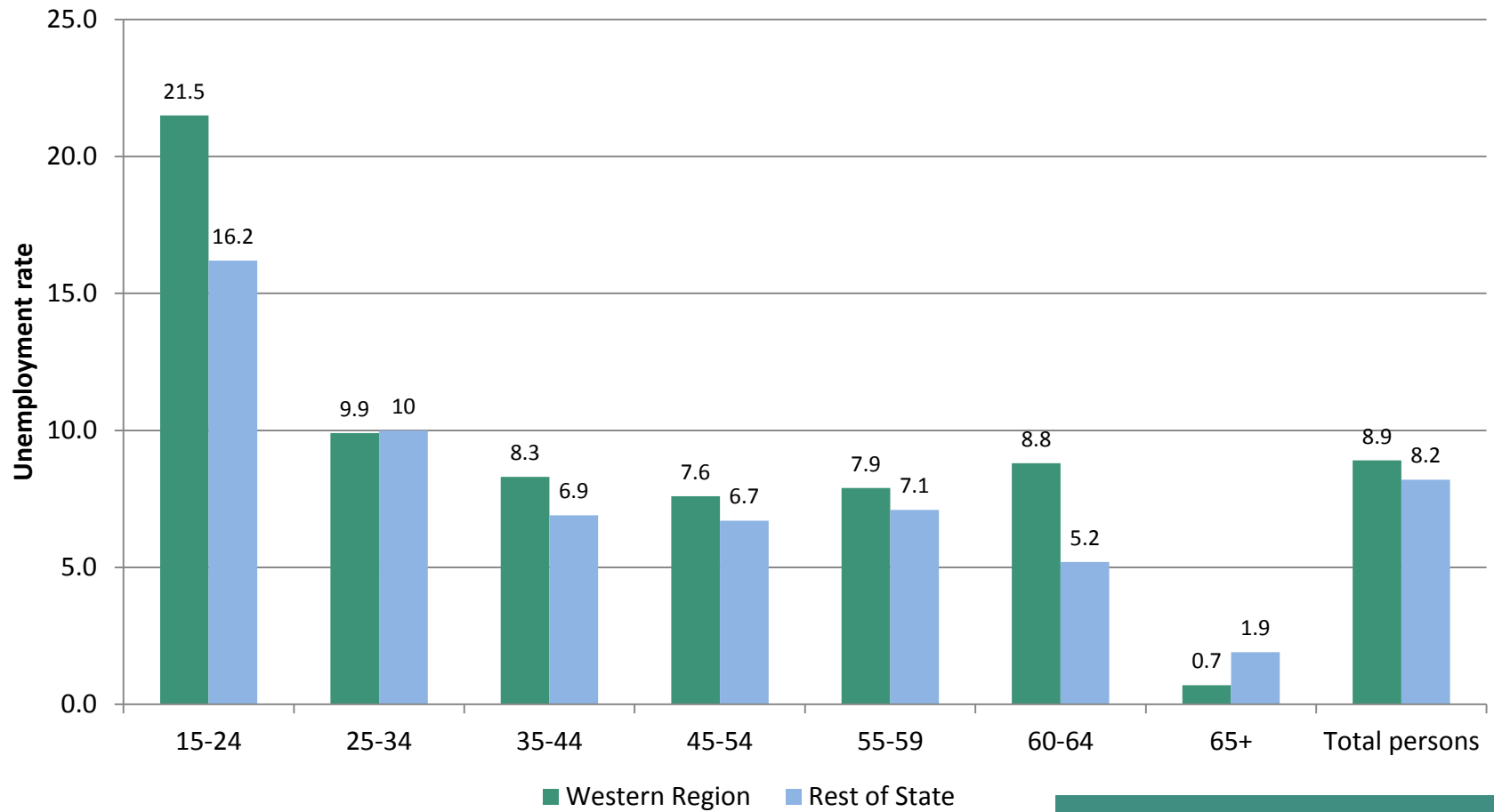
Long-term unemployed as % of total unemployed, 2007-2016



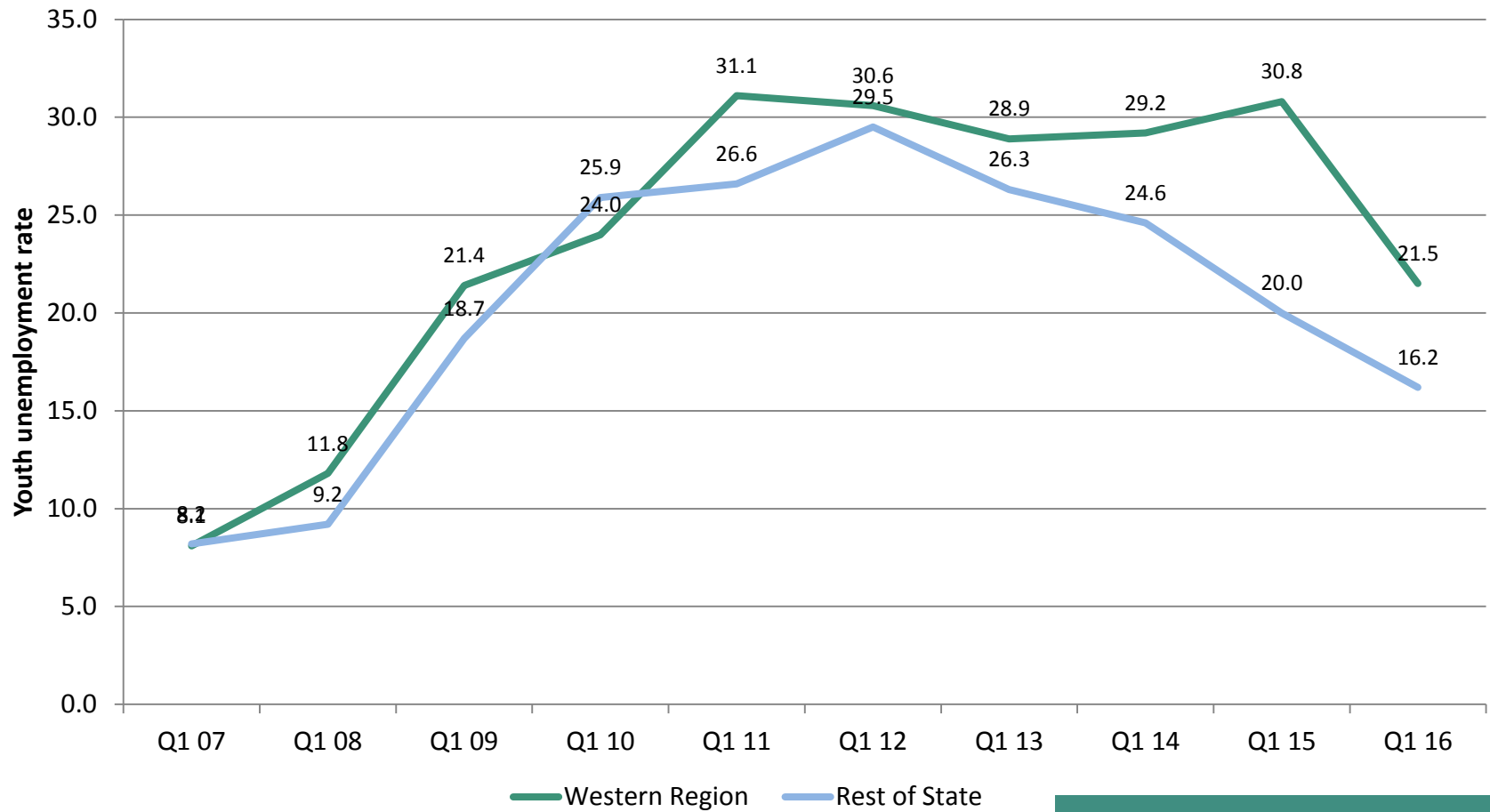
Unemployment rate & long-term unemployment rate, 2007-2016



Unemployment rate by age group in Western Region & Rest of State, 2016



Youth unemployment rate in Western Region & Rest of State, 2007-2016



INCOME

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Household Disposable Income per Person

- County level data on household disposable incomes per person is released every year by the CSO alongside data on regional GDP.
- The data for 2014 (provisional) is the most recent available and was published in 2016.
- While the data is not current, it is still useful to look at the trends over time
- Data for 2014 and provisional 2015 data will be available before end Feb 2017
- The County Household Disposable Income data allows useful comparison among counties and for examining trends over time.
- It indicates the level of material wealth of households residing in different regions.

Household Disposable Income per Person

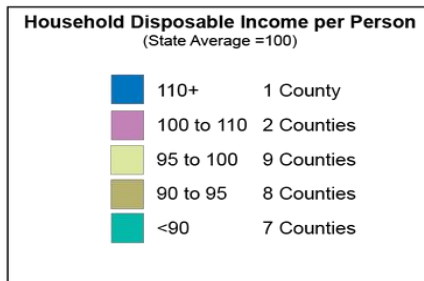
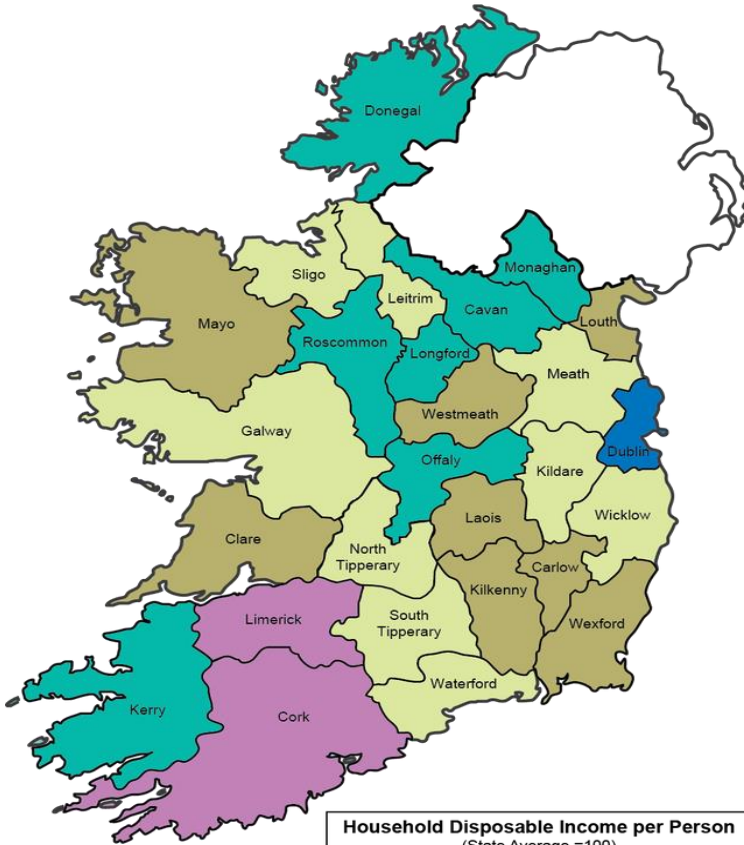
- *However* what is measured is not what you might consider a household income figure. It is ‘top down’ rather than ‘bottom up’
- Household disposable income is made up of primary income and social transfers less tax and social charges
- It is a better indicator of material well-being than GDP per person.
- Income levels are dependent on the characteristics of the county in terms both of economy and population. These in turn influence levels of economic activity and primary income and the inflow of social transfers.
- Counties with a higher proportion of older people, children, and other dependent groups are more dependent on social transfers.
- **Key statistic as shows trends and relativities and allows for comparison**

Household Disposable Income per Person

Household Disposable Income per Person 2013

Person

- County figures involve some uncertainty
- Western Region figures are inferred



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Household Disposable Income per Person 2013 and 2014

Income Statistic	Donegal	Leitrim	Sligo	Galway	Mayo	Roscommon	Clare	Western Region	State
Disposable income per person 2013	€15,178	€17,774	€18,039	€18,390	€17,365	€16,372	€17,499	€17,260	€18,707
% of State average 2013	81.1%	95.0%	96.4%	98.3%	92.8%	87.5%	93.5%	92.3%	100.0%
Change in disposable income 2012-2013 (%)	-3.5%	-2.3%	-1.0%	-0.8%	-1.3%	-1.7%	-0.6%	-1.4%	-1.4%
Preliminary Disposable income per person 2014	€15,558	€18,271	€18,596	€18,977	€17,876	€16,839	€18,011	€17,768	€19,309
% of State average 2014 †	80.6%	94.6%	96.3%	98.3%	92.6%	87.2%	93.3%	92.0%	100.0%
Change in disposable income 2012-2014 (%)	-1.1%	0.4%	2.1%	2.4%	1.6%	1.2%	2.3%	1.5%	1.8%

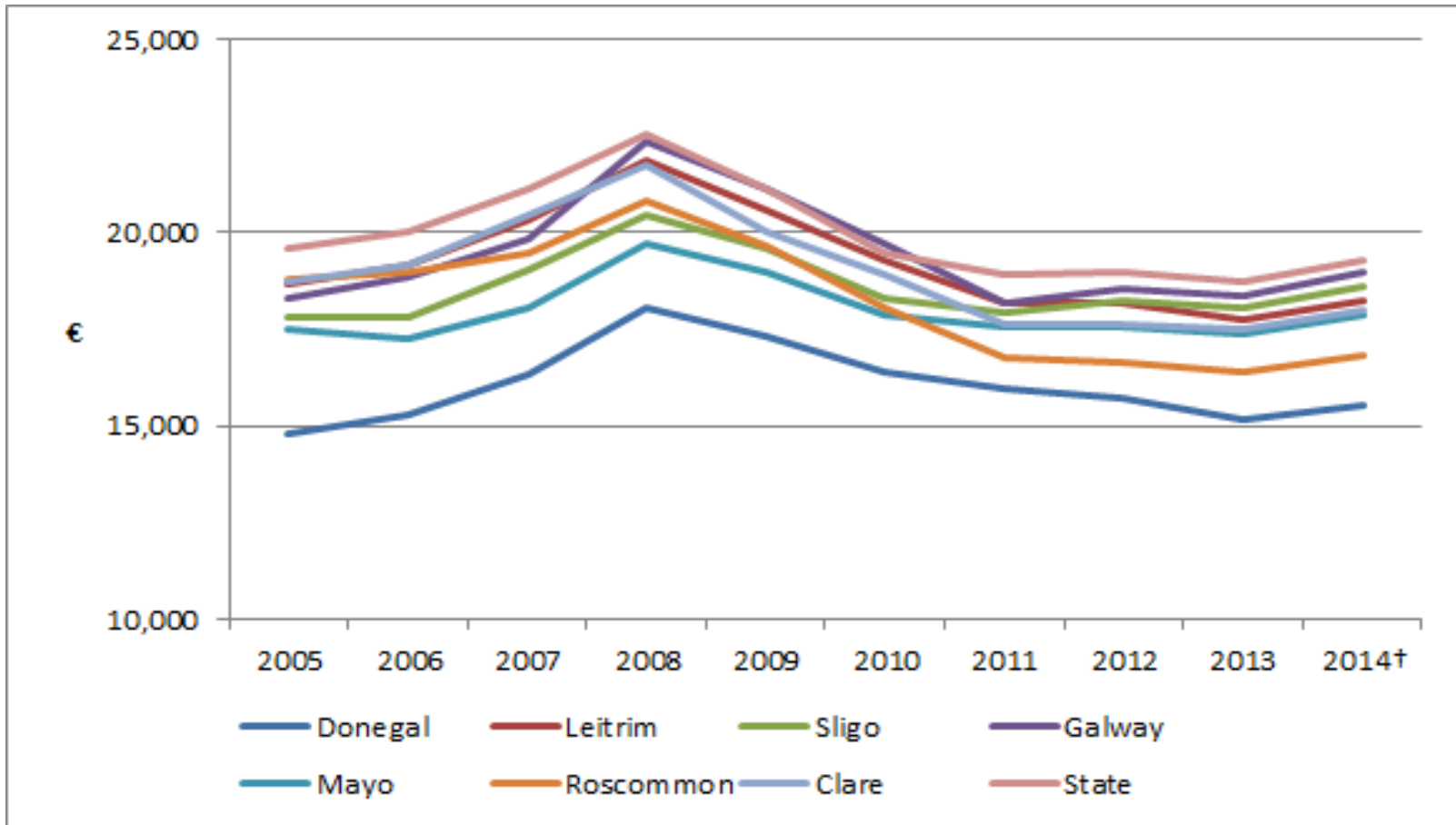
Household Disposable Income per Person 2013 and 2014- Western Region

- Disposable income in Western Region was €17,260 in 2013 (92.3% of State)
- Fell from €17,512 in 2012
- Provisional 2014 figures showed growth (€17,768)
- Still below the 2008 peak (€21,167)
- Highest in Western Region: Galway €18,390 (98.3% of State)
- Lowest in Western Region: Donegal €15,178 (81.1% state)
- State €18,707
- Provisional 2014 figures were higher in all counties

Household Disposable Income per Person 2013 and 2014

- Fall in disposable income 2012-2013 – greater fall in social transfers than growth in primary income
- People ‘not feeling the recovery’ in that period
- Grew 2012-2014 as growth in primary income compensated for the fall in social transfers

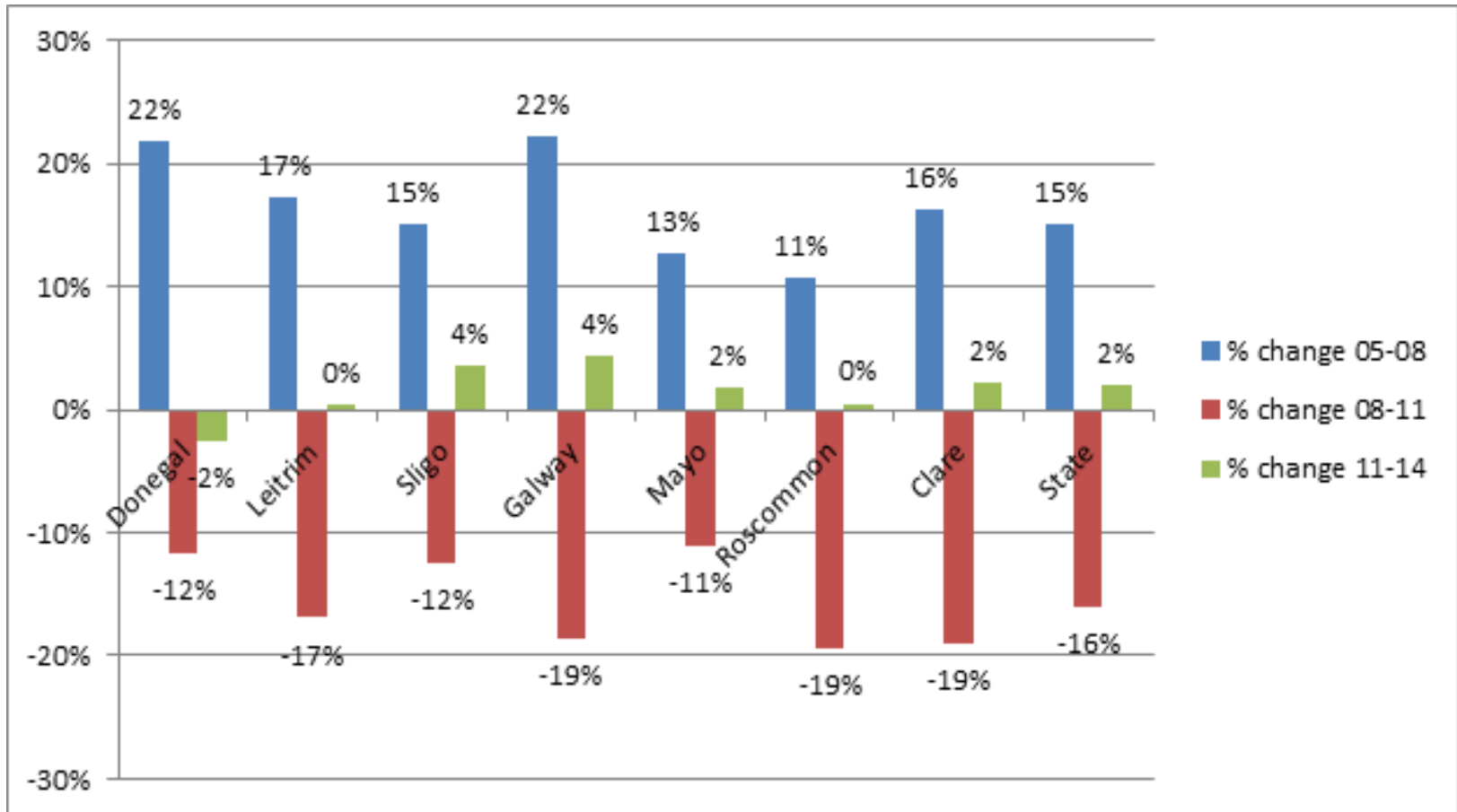
Household Disposable Incomes over Time



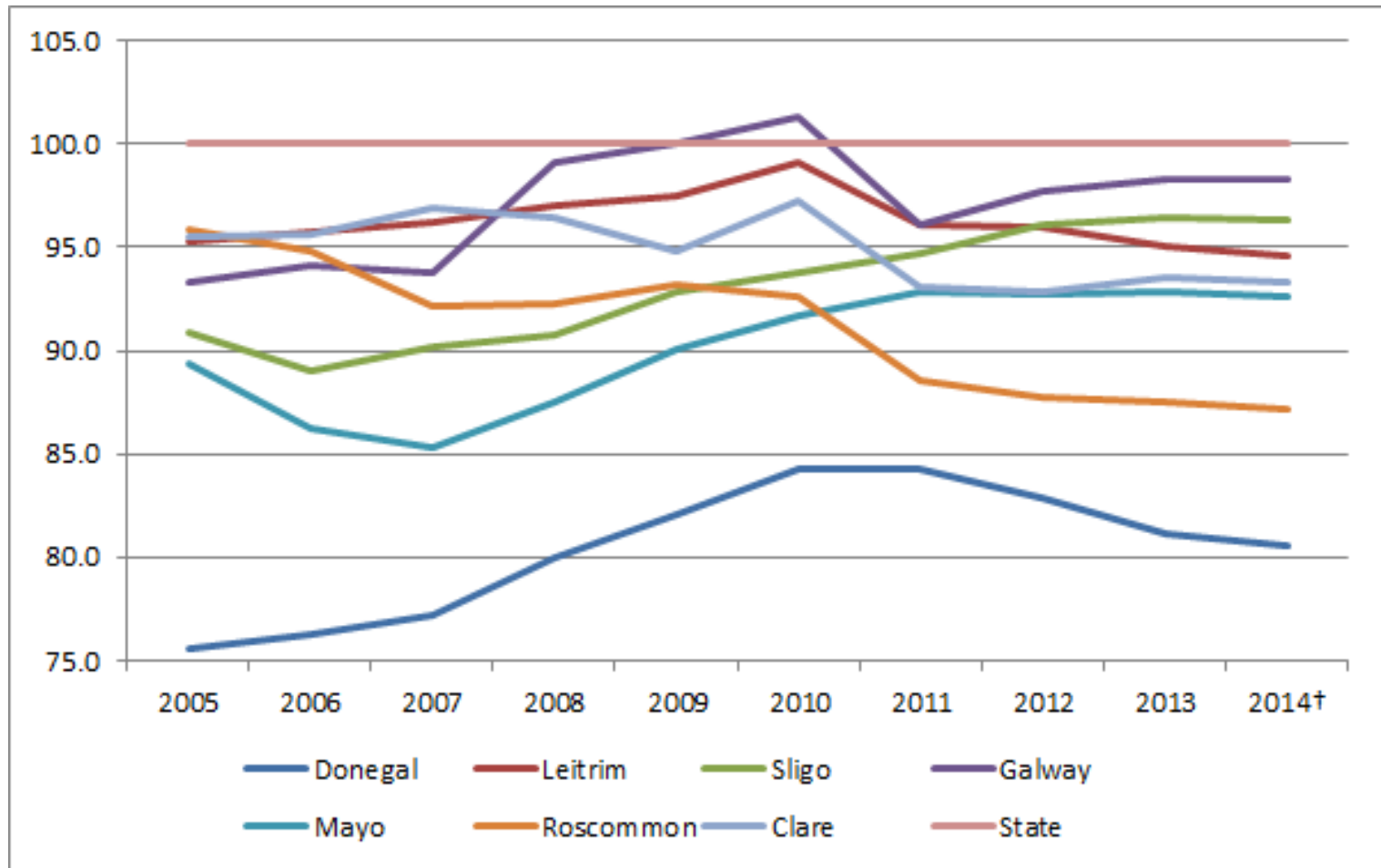
Household Disposable Income per person- changes over time

- 2014 still below pre crisis level
- 19% lower than 2008 in Roscommon
- 17% lower in Leitrim and Clare
- Mayo and Sligo 9% lower but better than state (14% lower than 2008)
- Longer Term the gap is narrowing:
 - Western Region was 84.3% of State in 1995
 - Western Region was 89.1% of State in 2000

Changes in Disposable income per person in the Western Region 2005 to 2014



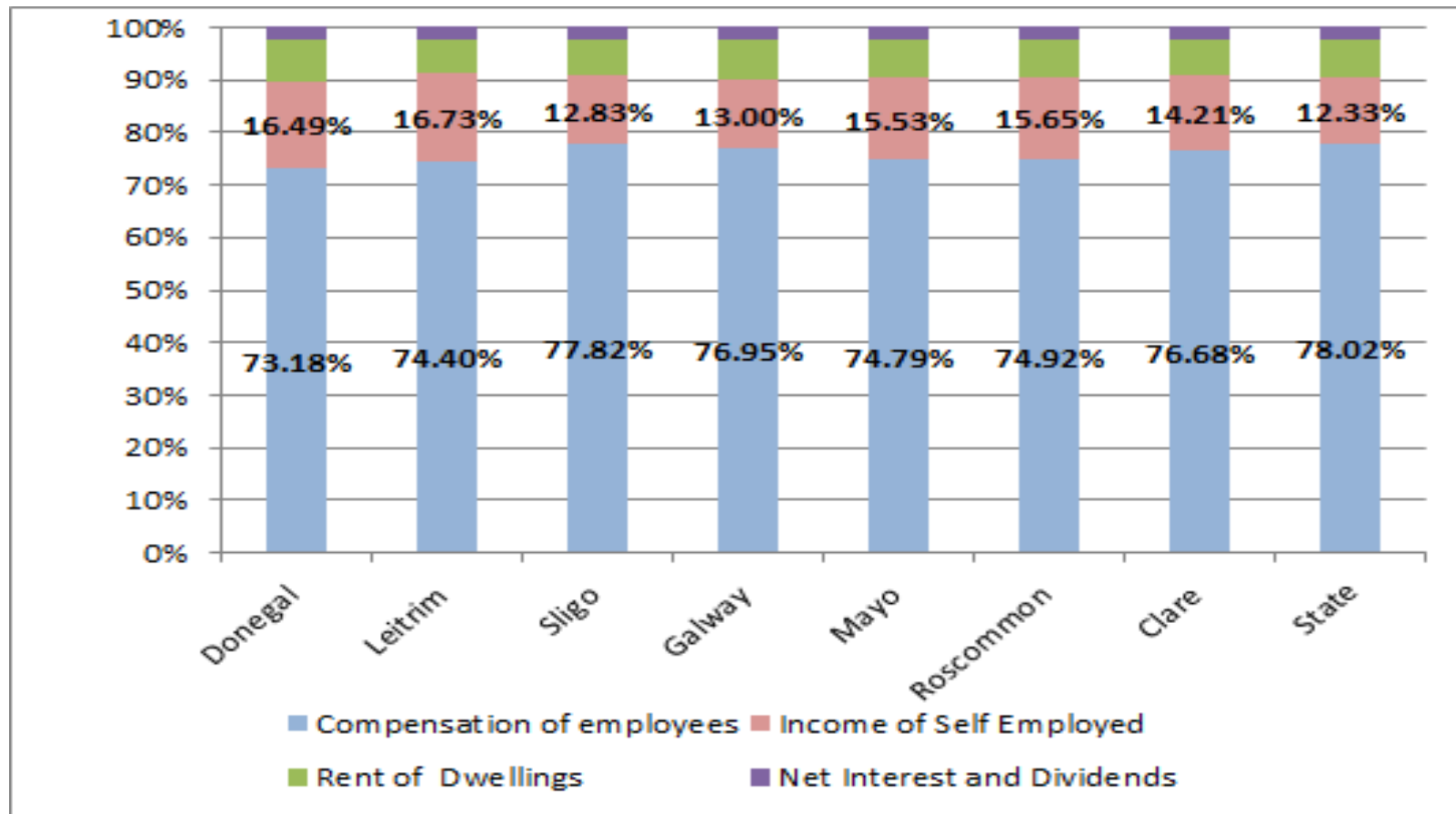
Variation relative to the State- Index State=100



Comparison to the State

- In general the gap between the Western Region counties and the state was narrowest in 2010 the result of a sharper drop in incomes in the more wealthy counties than in most of the Western Region. Since then however, counties have had mixed fortunes.
- Roscommon had a significantly lower income relative to the state in 2014 (87.2) compared to 2005 (95.8). Clare has also fallen relative to the state starting at 95.5 in 2005 and at 93.3 in 2014
- Sligo, Galway, Mayo and Donegal have improved their position relative to the state since 2005, albeit with some variation.
- Galway has been the best performer in the region moving from an index of 93.3 in 2005 to a peak in 2010 when its index was above 100.0, though there has been some decline and recovery since (98.3 in 2014) it is still the closest county in the region to the state average.
- Sligo has also performed well with its index improving almost every year since 2005 (90.8 to 96.3 in 2012). This is its highest index level in this last ten years.

Components of Disposable Income- Primary Income

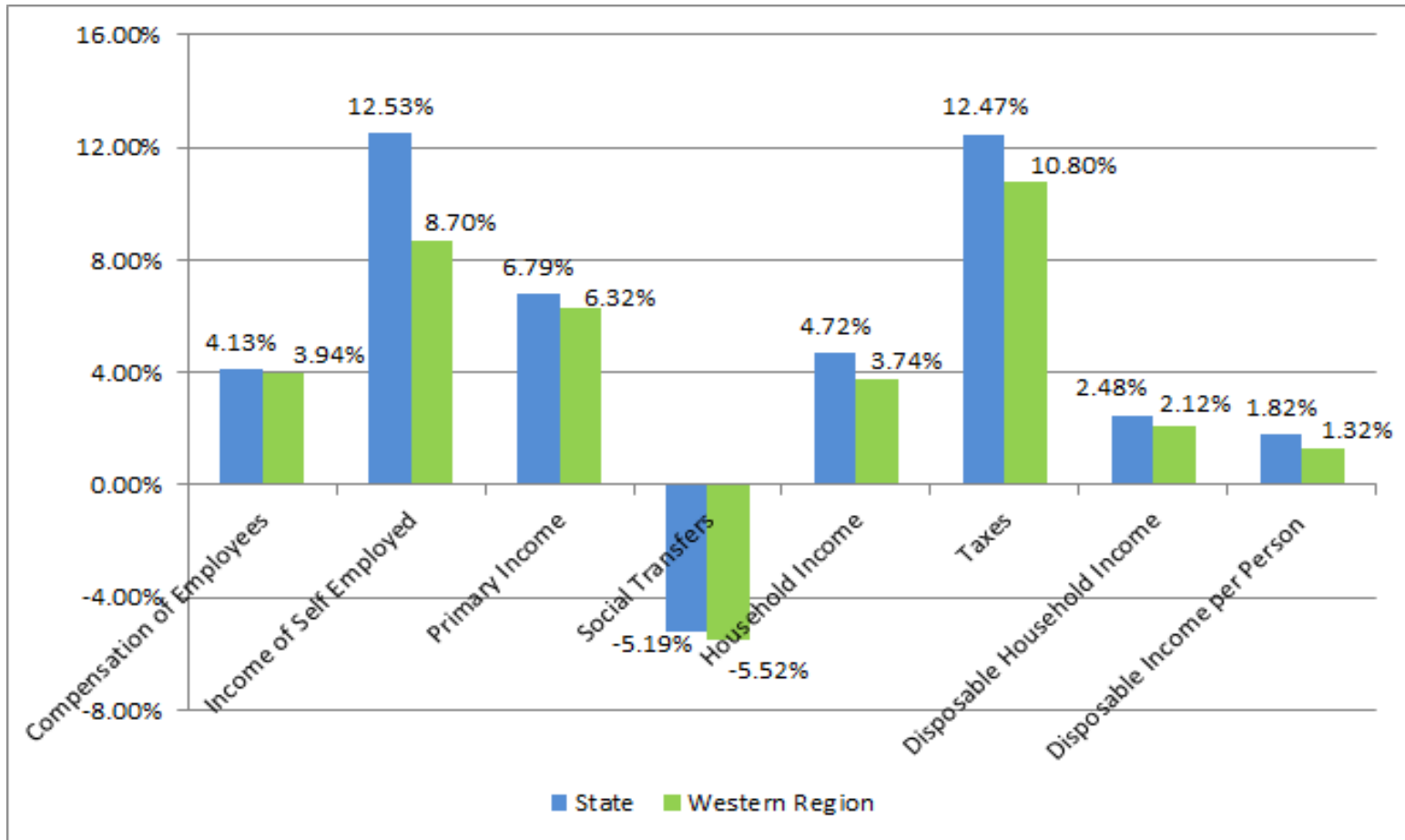


Total Income and Social Transfers

- Social Transfers- includes unemployment benefit and assistance, disability benefits, state pensions and children's allowances.
- They make up a relatively high proportion of Total Income in some counties (Total Income is Primary Income plus Social Transfers)
- In the state were Social Transfers are 22.5% of Total Income, less than in any of the Western Region counties where it varies from 23.4% in Galway to a very significant 34.4% in Donegal.
- The amount of Social Transfers fell in all western counties between 2012 and 2014 and Total Household Income fell in most Western Region counties in that period.



Changes in the Components of Disposable Income 2012-2014



Conclusions

- Disposable Income is made up of different sources of income and transfers and is affected by taxation.
- It is important to understand the changes in each of these components when considering changes to income.
- The fall in Disposable Income in all Western Region counties between 2012 and 2013 was mainly as a result of the decrease in Social Transfers in that period, as Primary Incomes grew everywhere except Donegal and Leitrim.
- In contrast, between 2013 and 2014, despite continued falls in Social Transfers the increase in Primary Income in all counties of the Region was sufficient to ensure that Disposable Incomes increased in all of the Western Region counties except Donegal

THE REGIONAL ECONOMY- REGIONAL GVA GDP

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Trends in Regional Output

- Regional Gross Value Added or GVA (and GDP) measures output and economic activity of each region
- Provides a basis for comparison among regions and internationally
- Useful for tracking output levels and changes over time
- Limitations because of commuting, transfer pricing and profit repatriation
- Trend towards Income, Wealth and Consumption data but little available regionally



Regional GVA

- Data is published for regions and is not available by county
- Most recent data is for 2013 with preliminary 2014 data also available
- GDP is Gross Domestic Product, GVA is Gross Value Added
- GDP and GVA are the same concept i.e. they measure the value of the goods and services (or part thereof) which are produced within a region or country.
- GDP is valued at market prices and hence includes taxes charged and excludes the value of subsidies provided.
- GVA at basic prices on the other hand excludes product taxes and includes product subsidies.



West Region- 2013

- GVA per person in the West Region was €26,839.
- This is a fall of 6.5% on 2012 (€28,698) and 2011 (€28,840).
- The preliminary figure for 2014 shows some recovery on 2012 to €28,113 which is still lower than 2011.
- The West had shown a rapid recovery from the economic crisis, GVA had declined in 2008 and 2009 it grew in 2010 and 2011, and declined again (slightly) in 2012 before a more significant fall in 2013.
- There was some recovery in 2014.

Border Region- 2013

- The Border Region has shown a somewhat steadier pattern of recovery.
- GVA per person in 2010 was at its lowest (€21,846) in the last decade, a fall from €27,301 in 2007.
- Since 2009 there has been a reasonably steady growth (though 2012 was less than 2011)
- GVA in 2013 (€23,260) was 11.1% higher than 2012 and preliminary figures for 2014 showed an 4.7% increase to €24,381.



GVA

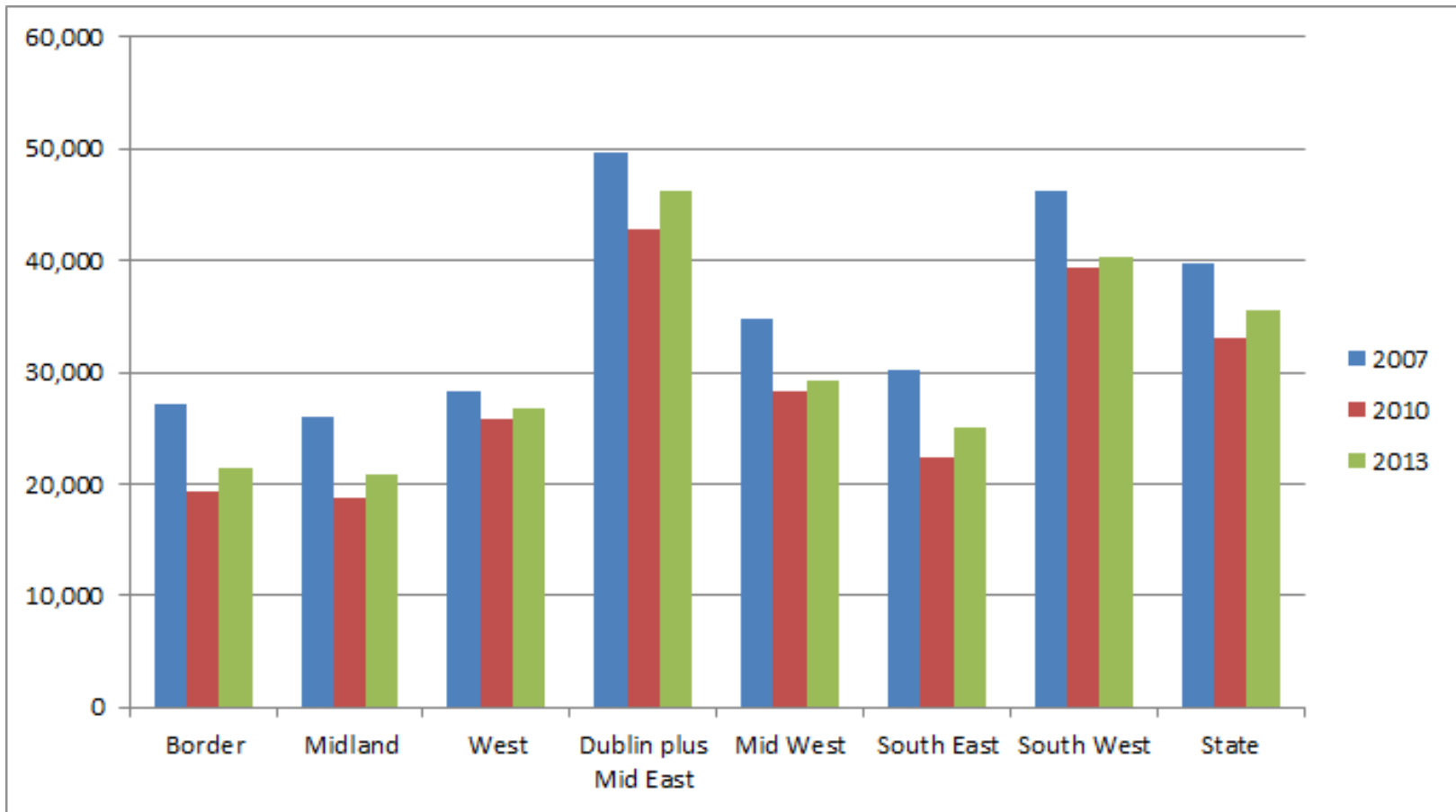
	Border	Midland	West	Dublin and Mid East	Mid West	South East	South West	State
GVA per person 2013	€21,445	€20,923	€26,839	€46,213	€29,305	€25,092	€40,394	€35,464
<i>GVA per person 2014 (preliminary)</i>	€22,459	€22,002	€28,113	€48,582	€30,695	€26,282	€42,059	€37,186
2013 Index of GVA per person (state=100)	60.5	59.0	75.7	130.3	82.6	70.8	113.9	100.0
2013 Index of GVA per person (EU28=100)	79.8	77.9	99.9	172.0	109.1	93.4	150.3	100.0



Output vs population and persons at work

	GVA %	Population %	Persons at work (%)
Border	6.8	11.2	9.7
Midland	3.2	6.2	5.9
West	7.3	9.7	9.8
Dublin plus Mid East	51.2	39.3	41.6
Mid West	6.8	8.3	8.1
South East	7.7	10.8	10
South West	16.5	14.5	14.9
State	100	100	100

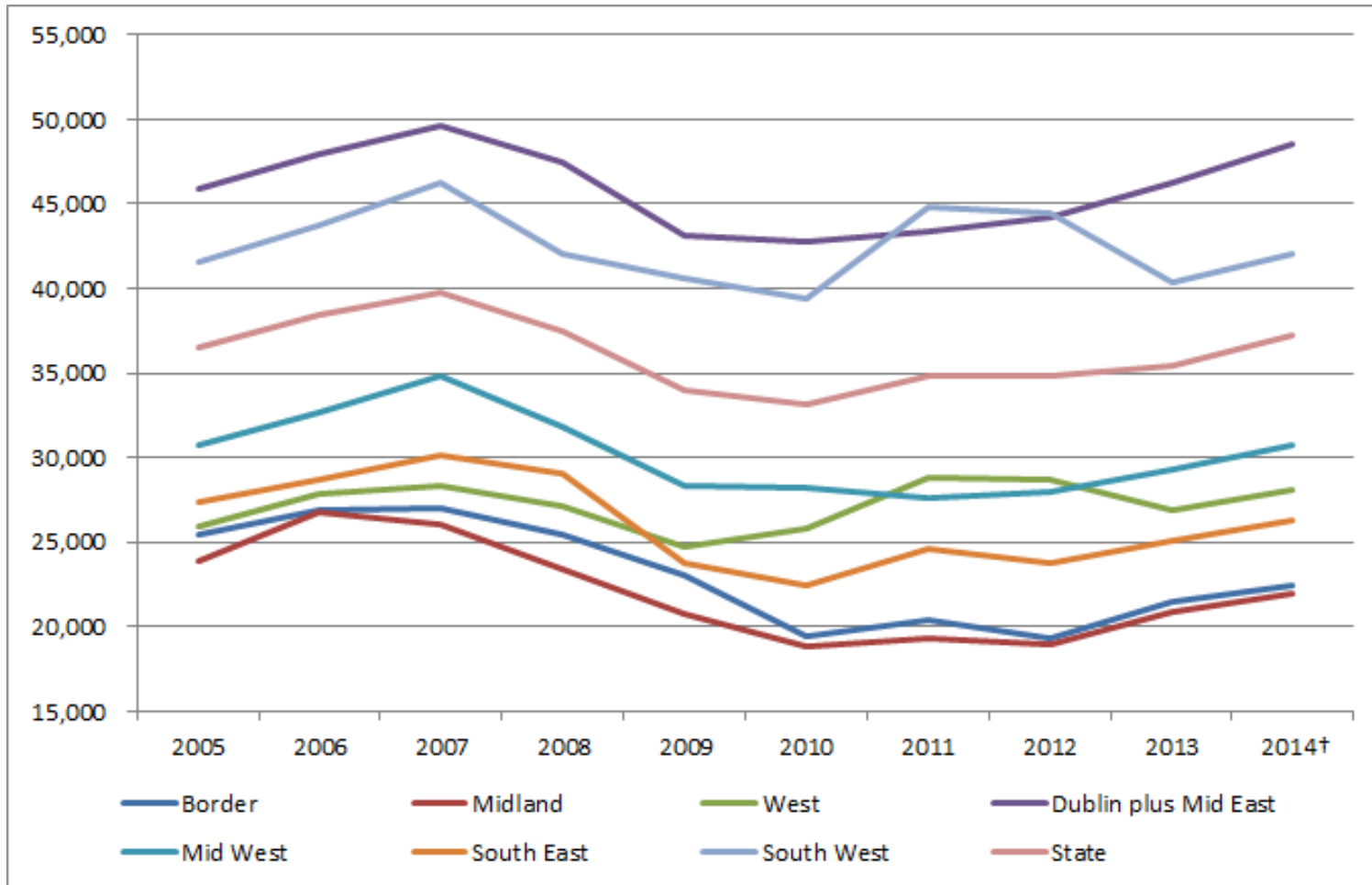
GVA trends



GVA Trends

- Dublin region (when considered alone and not with the Mid East) is the only region where the preliminary 2014 figure is higher than the peak GVA per person in 2007
- None of the other regions have recovered to the 2007 level, though the difference in the West region is slight (and in 2012 GVA in the West was higher than that in 2007).

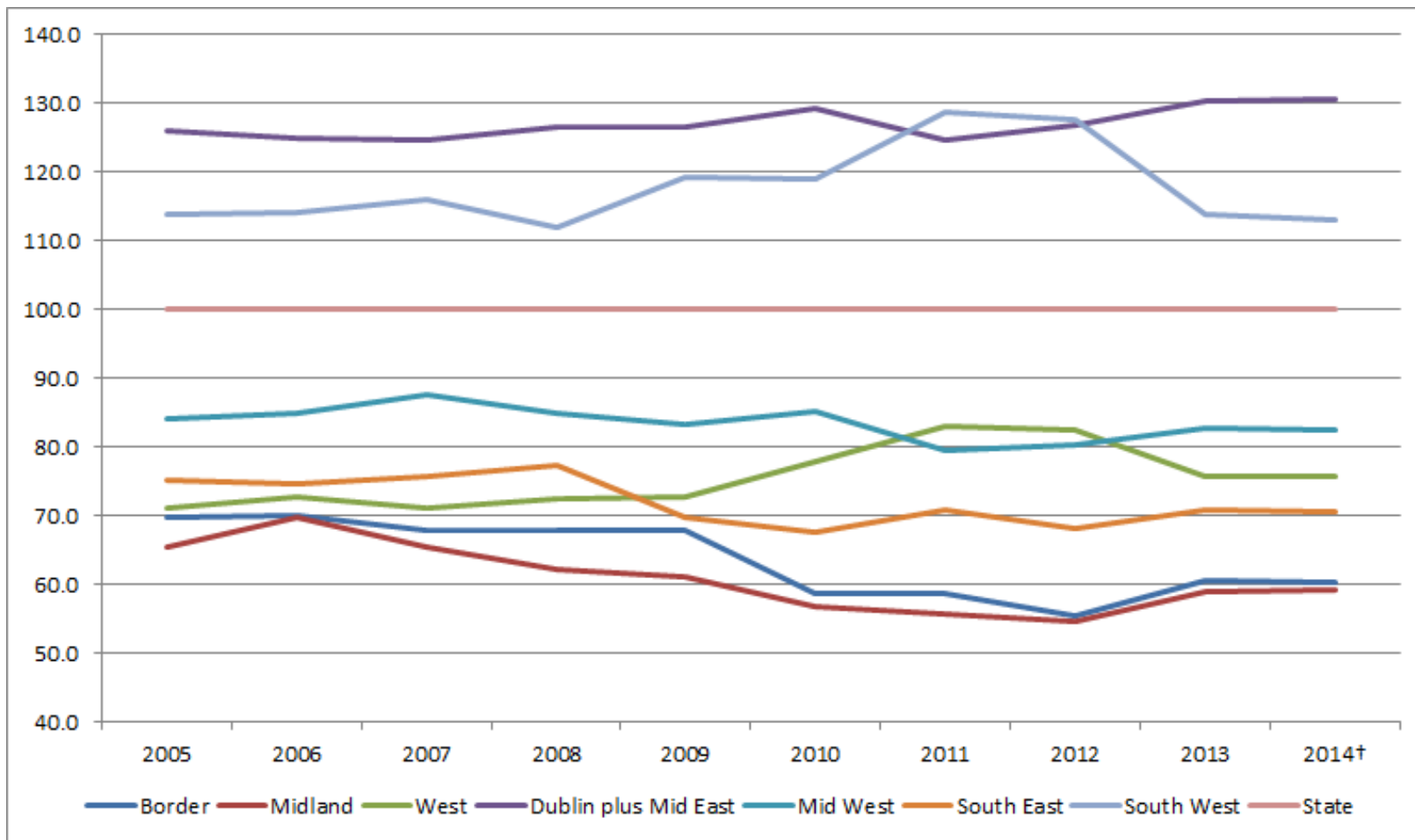
GVA Trends



GVA Trends

- The changes in GVA in the regions since 2005 show the clear peak in all regions in 2007 and the varied pattern of growth in the different regions since then.
- Differing growth patterns in the regions gave rise to a widening of the disparities among the regions immediately after the crash.
- This is most easily seen looking at the Indices of GVA per person from 2005 to 2014 with the State=100

GVA vs State =100



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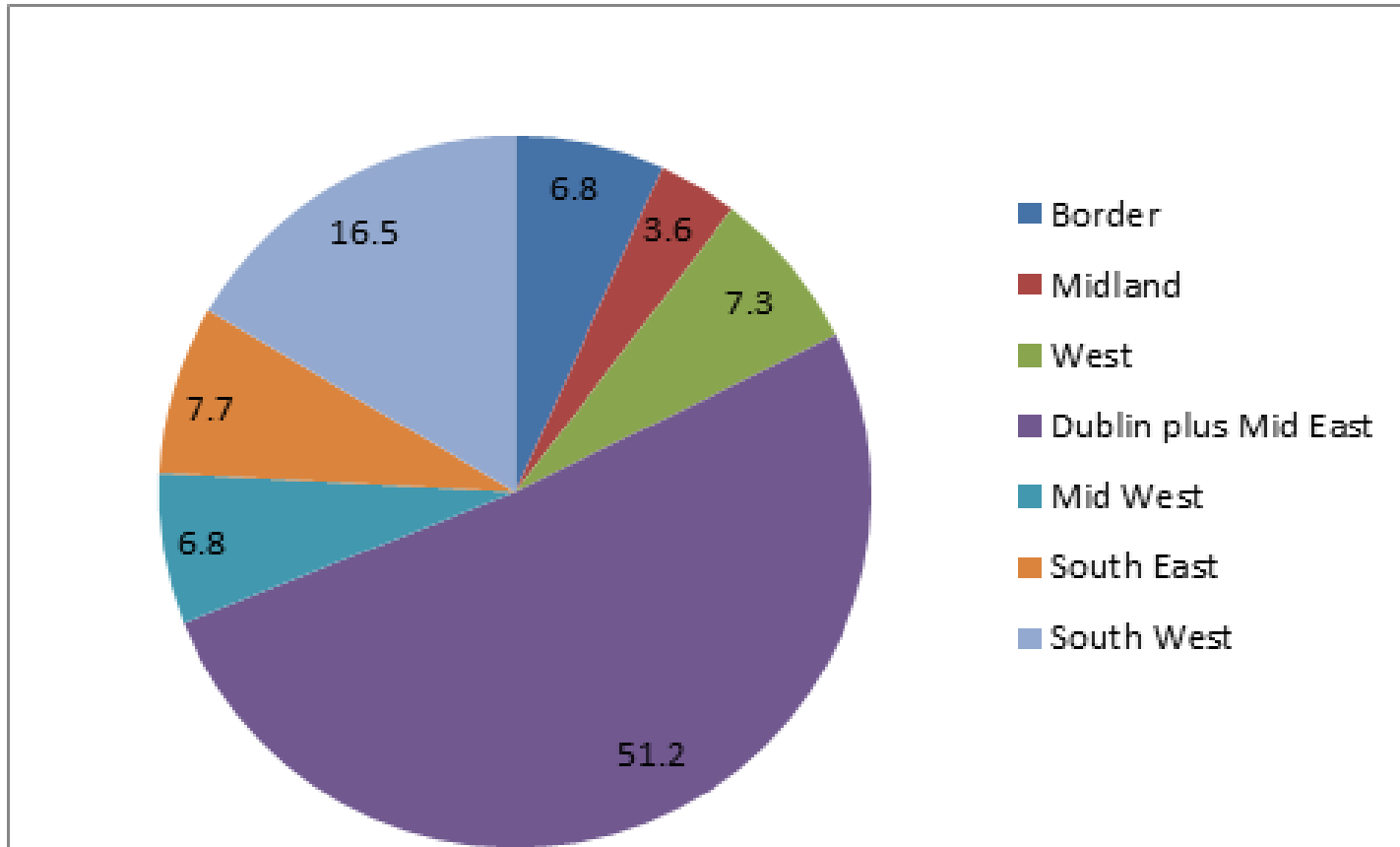
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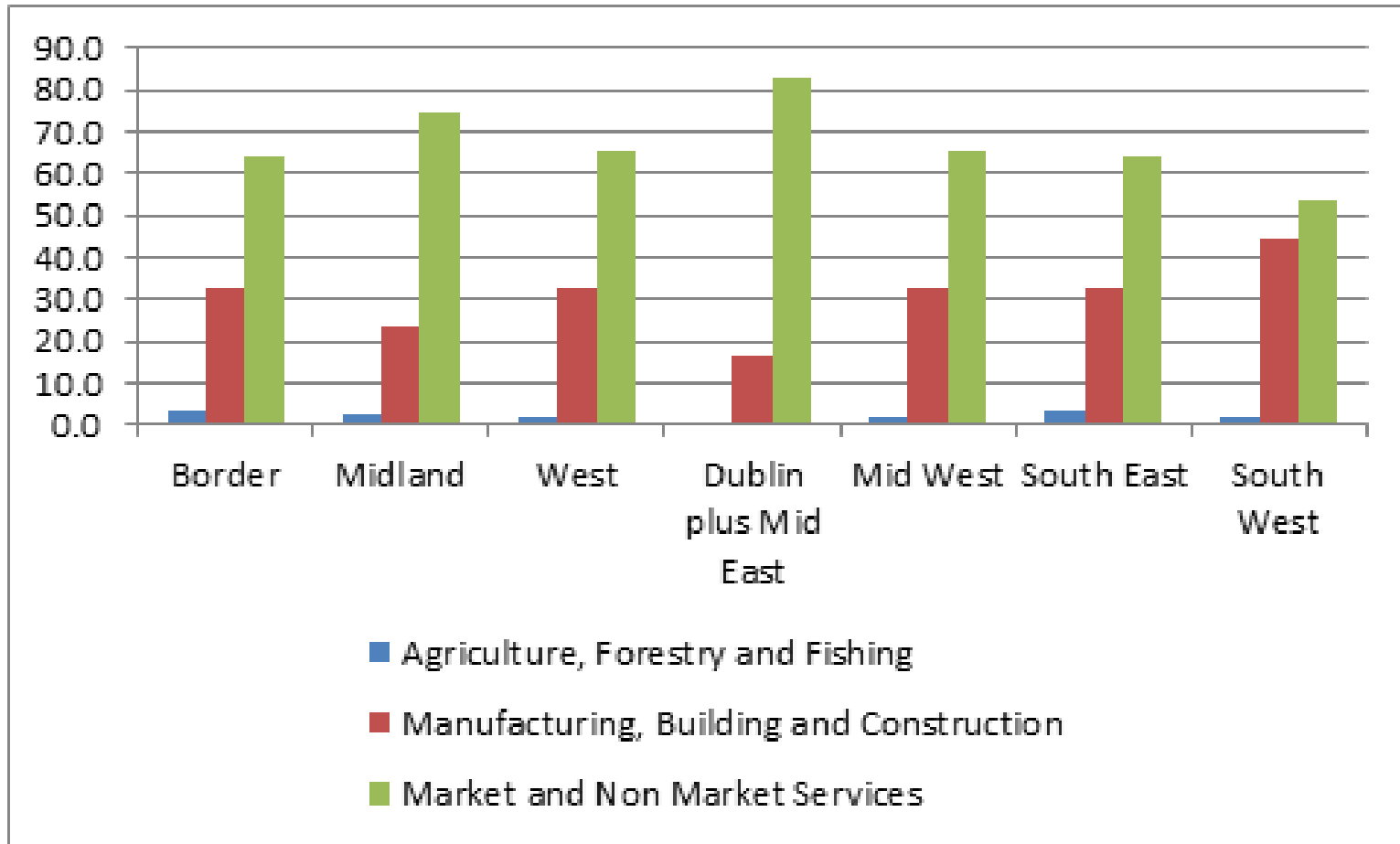
Regional Disparities

- In 2005 there were 60.6 index points between the lowest GVA per person in a region (Midland, 65.4) and the highest (Dublin and the Mid East, 126.0).
- In 2007, at the peak of the boom (for most regions) the difference was 59.2 (65.5 and 142.7 for the same regions)
- In 2014 the difference between Midland (59.2) and Dublin and the Mid East, (130.6) was 71.4 index points (71.3 in 2013)

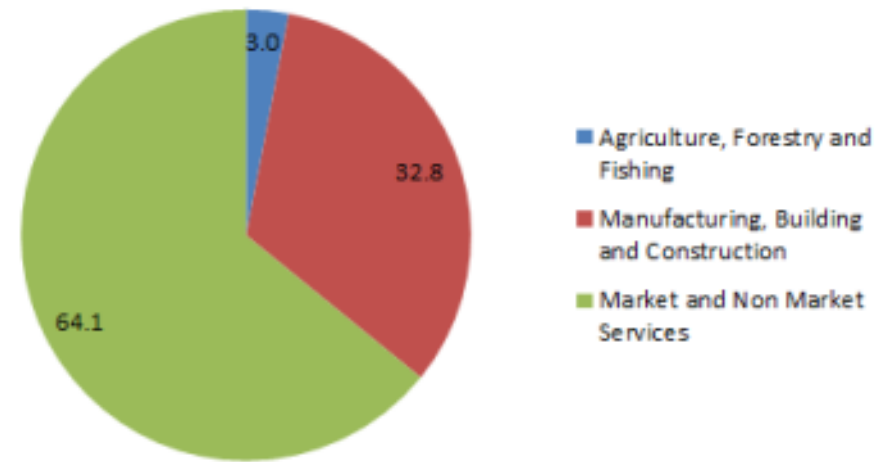
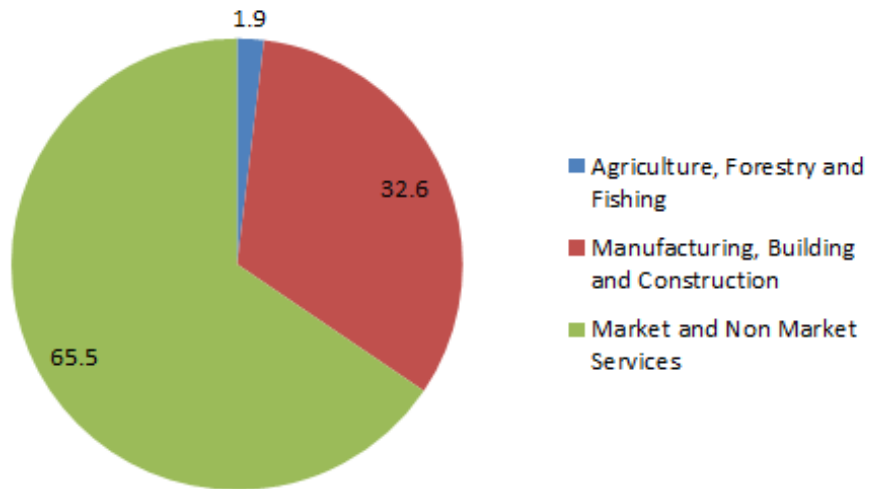
Share of GVA Produced by Region



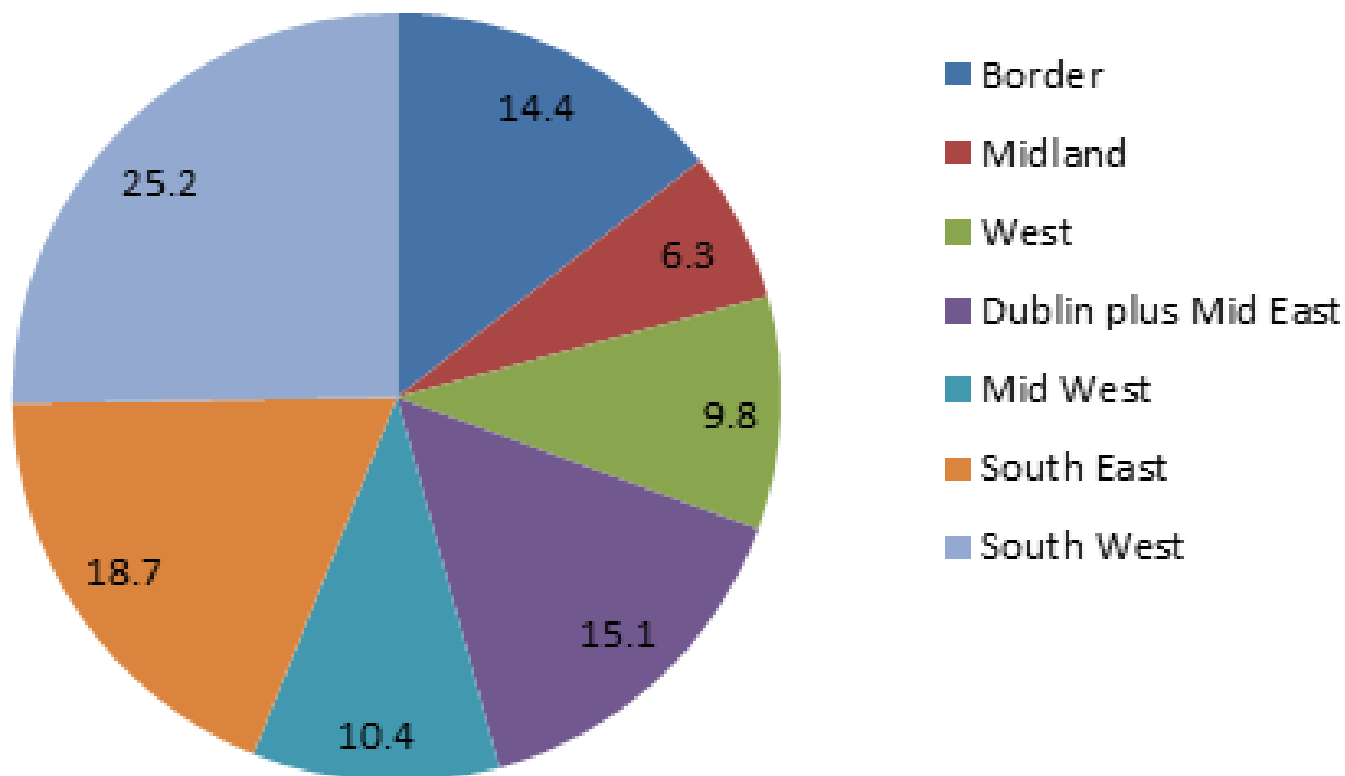
The contribution of main sectors in each region



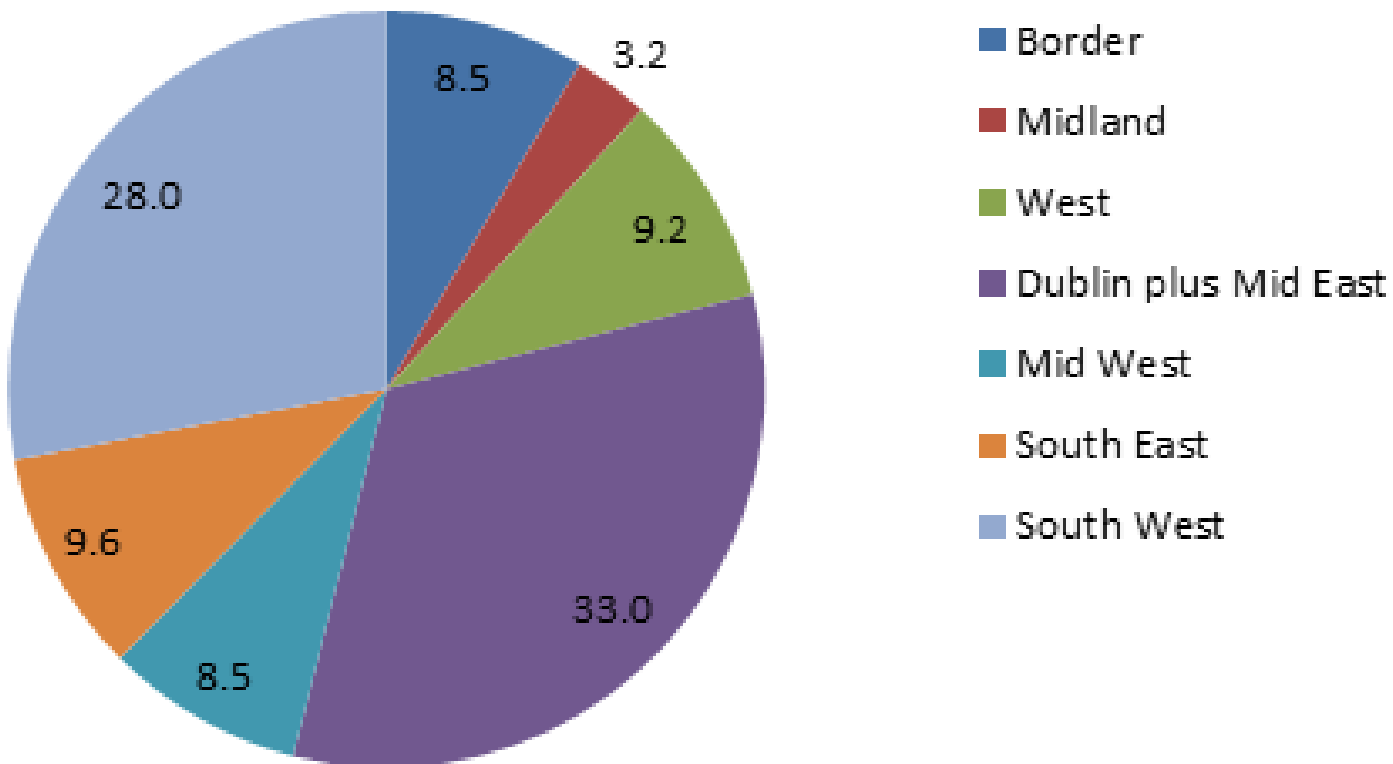
GVA by sector in the West and Border region



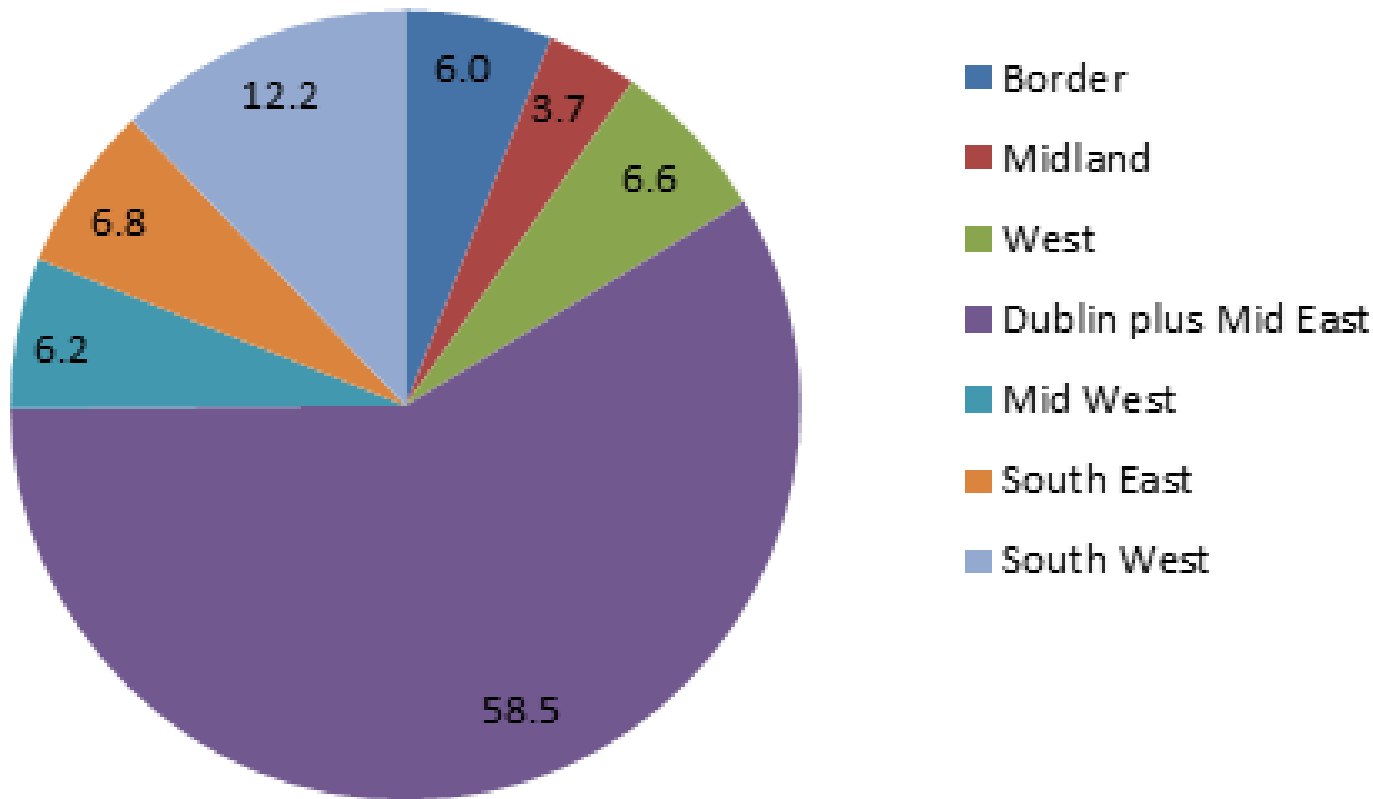
Percentage share at basic prices of Agriculture, Forestry and Fishing produced by each region



Percentage share at basic prices of Manufacturing, Building and Construction produced by each region



Percentage share at basic prices of Market and Non Market services produced by each region



Conclusion

- There was welcome growth in most regions in 2013 and all regions showing growth in the preliminary figures for 2014
- Widening of disparities in GVA since 2008 are of concern, even though the improvement in 2013 and 2014 may indicate that some of this is related to a delay in recovery.
- Differences in GVA growth among regions are partially the result of increased productivity and concentration in high value sectors in the wealthier regions.
- Underlines the importance of ensuring that there is a focus on regional development and a policy of investment in these sectors in all regions.

ENTERPRISE

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CSO, Business Demography

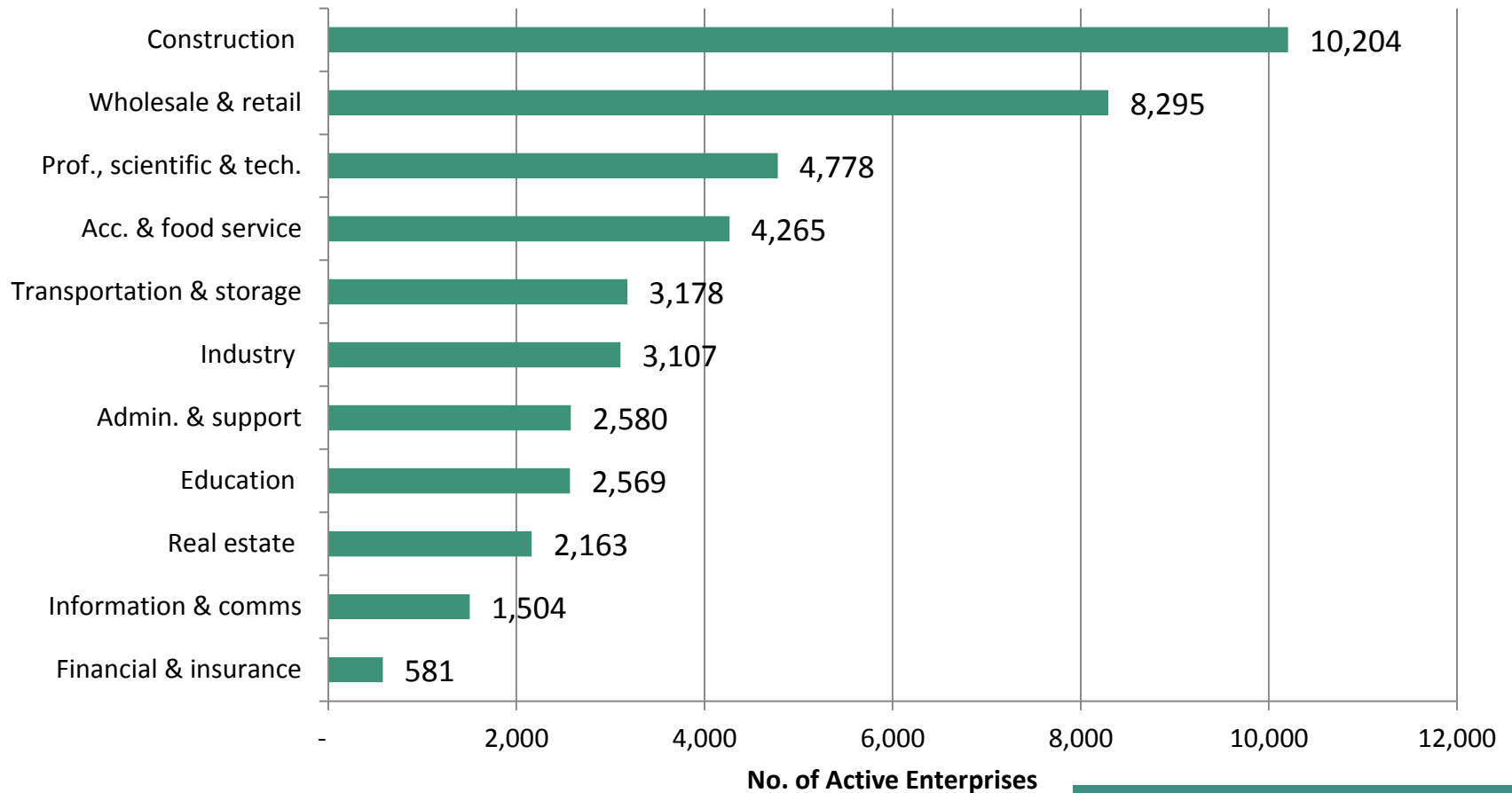
- 2014 latest data
- Based on enterprises registered with Revenue
- Enterprises counted in county where HQ is registered
- Branches in other counties not included



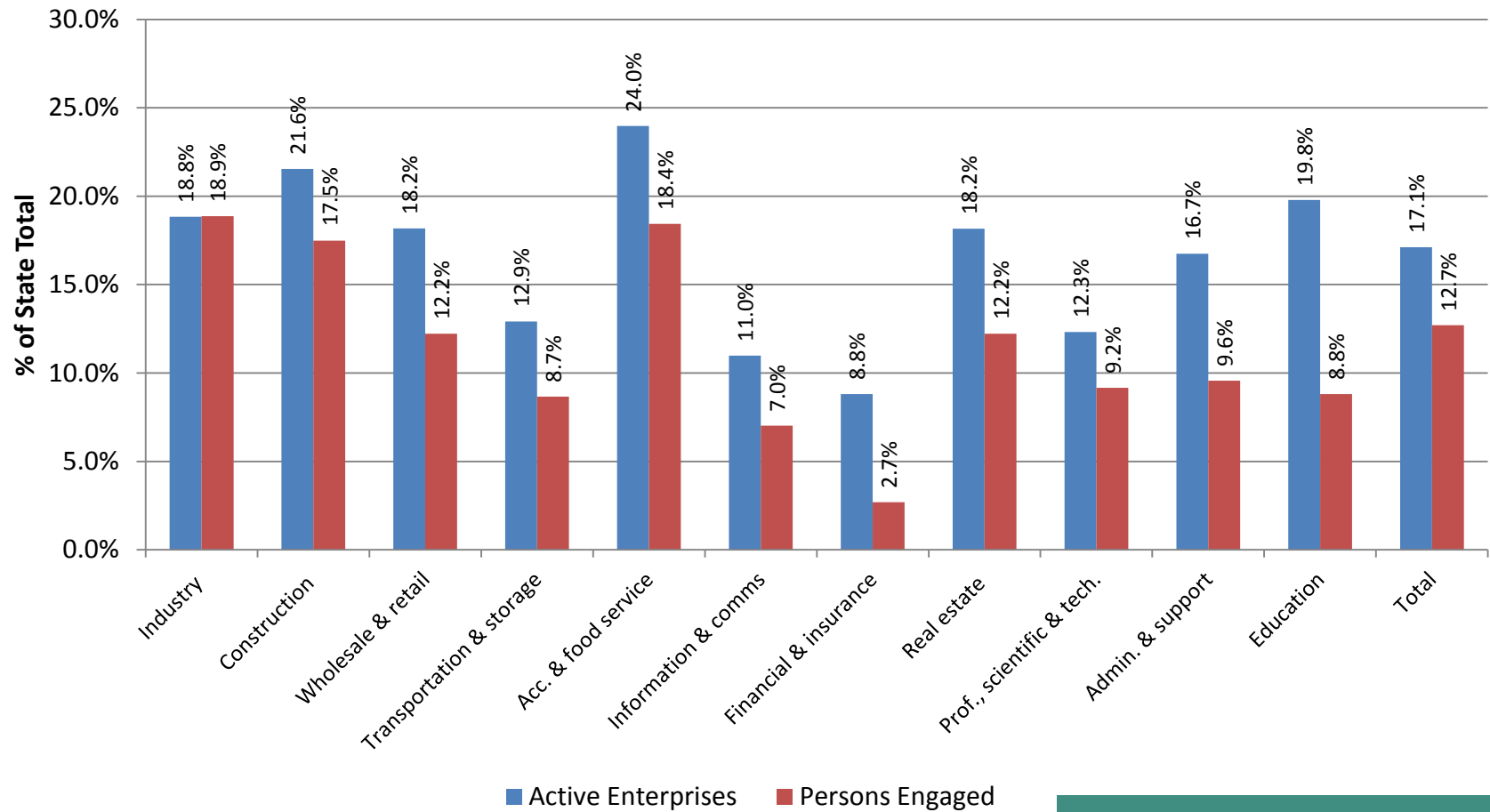
Western Region's role in national enterprise base declining; smaller business size

- Share of enterprises nationally based in WR declining
- WR has smaller avg business size & share of all enterprises is greater than its share of people working in them
- Construction, Wholesale & Retail, Professional activities & Accommodation & Food Service largest enterprise sectors
- Less than 5% of region's enterprises in Financial & Insurance and Information & Communications combined.
- Compared with RoS, traditional sectors & local services account for larger shares & knowledge services smaller
- Employees as a % of Persons Engaged (employees + owners + relatives) is lower in WR – link to self-employment

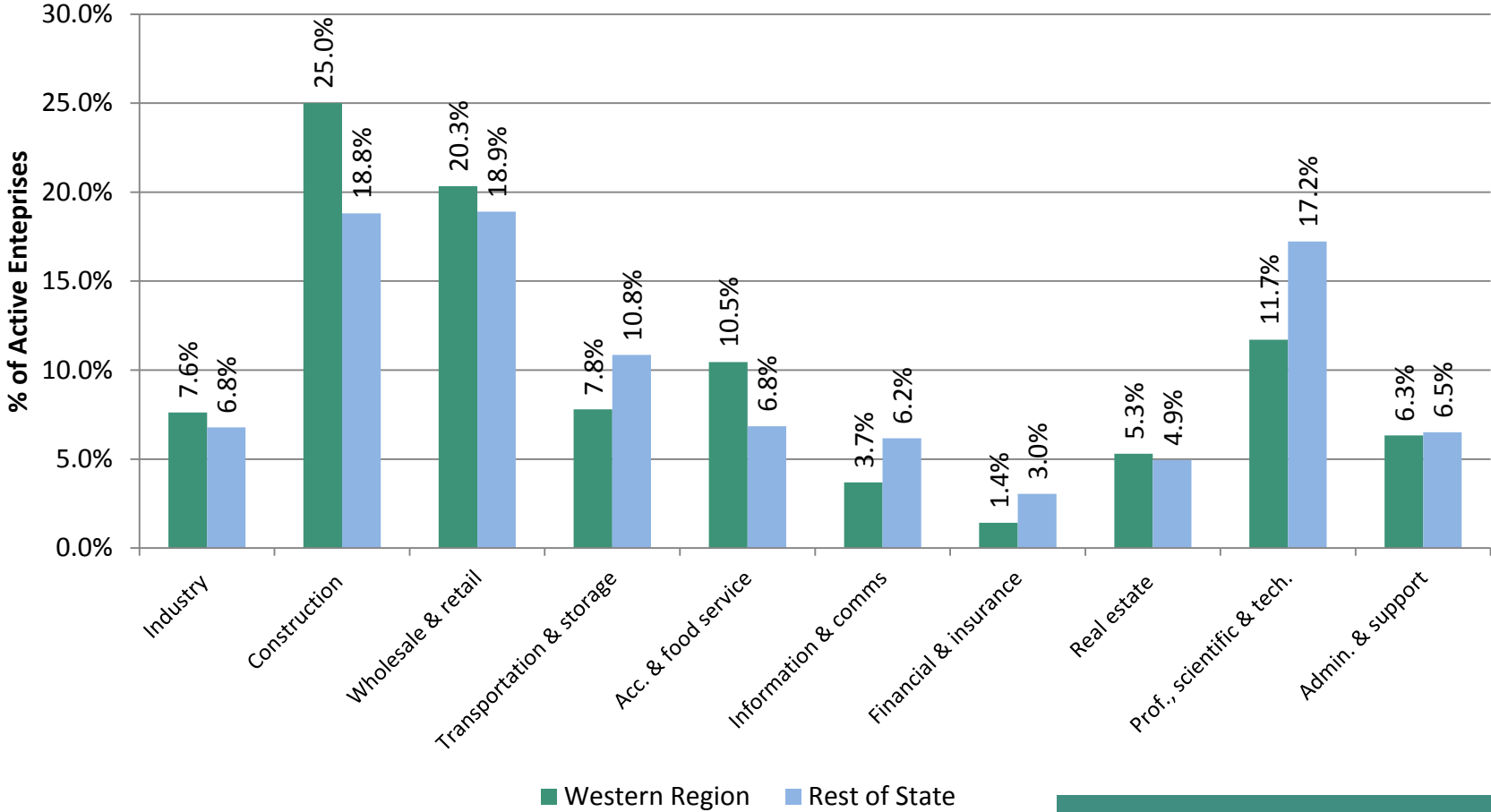
No. of active enterprises by sector in Western Region, 2014



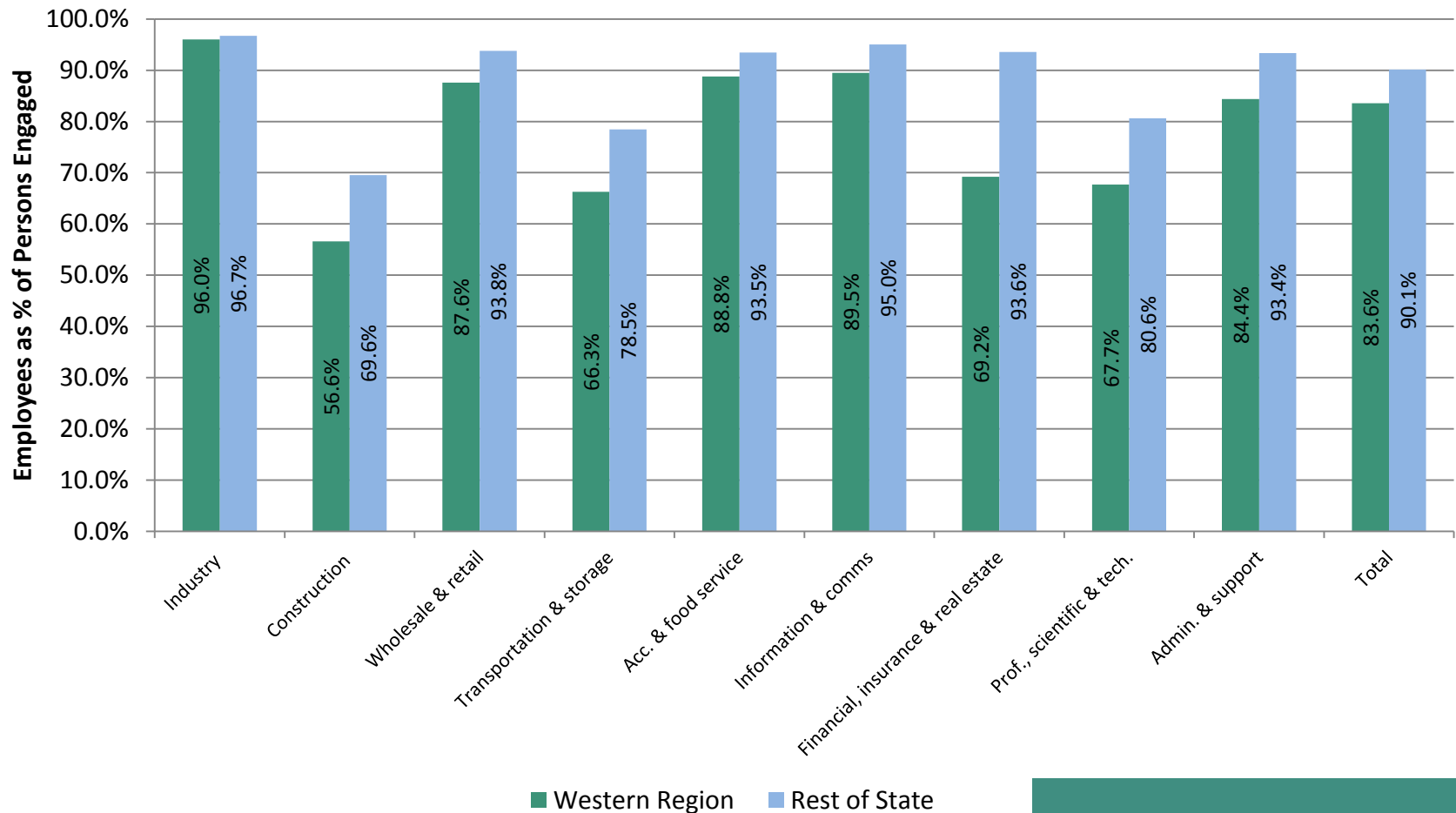
% of active enterprises & % of persons engaged by sector based in Western Region, 2014



% of active enterprises by sector, Western Region & Rest of State, 2014



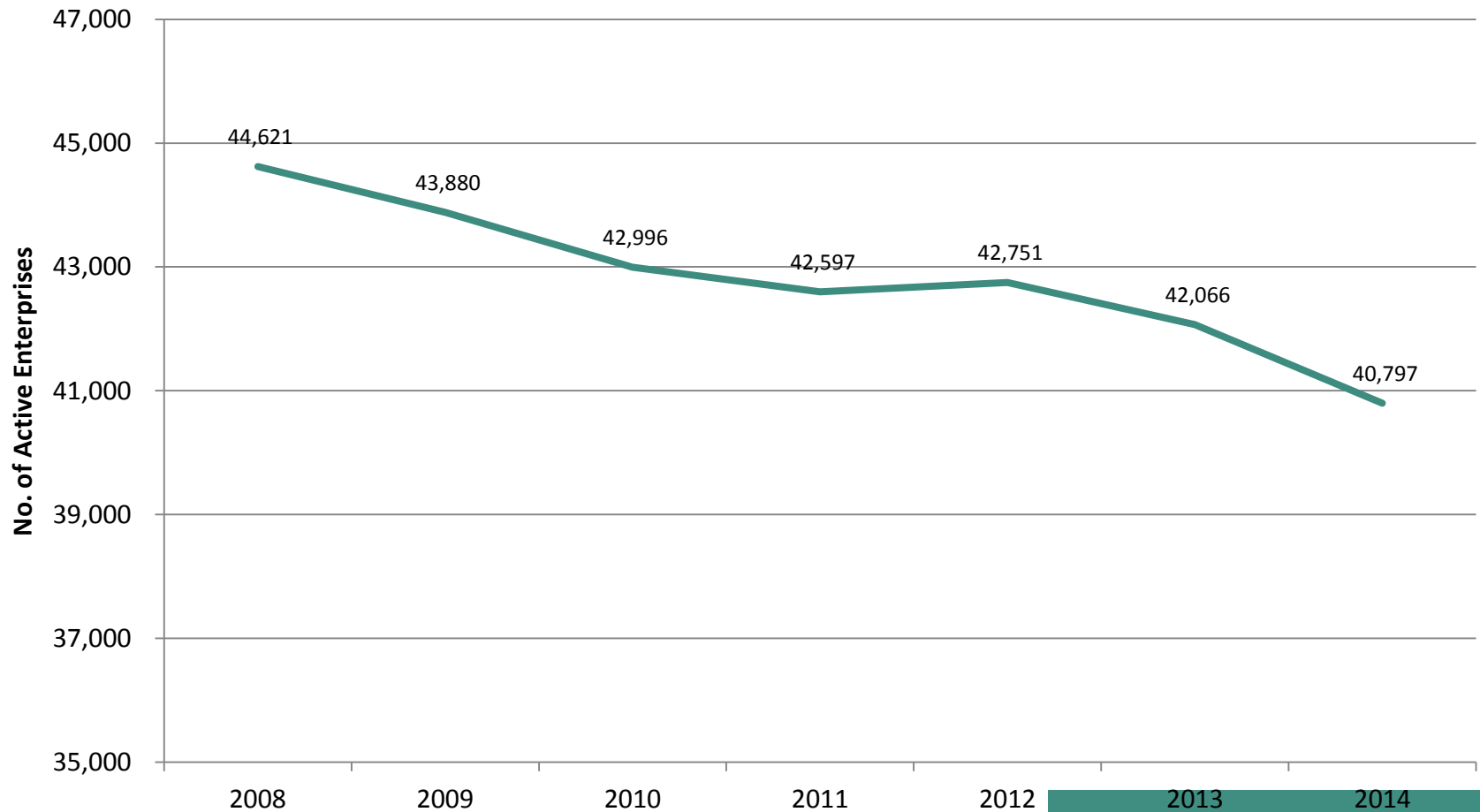
Employees as % of persons engaged by sector in Western Region & Rest of State, 2014



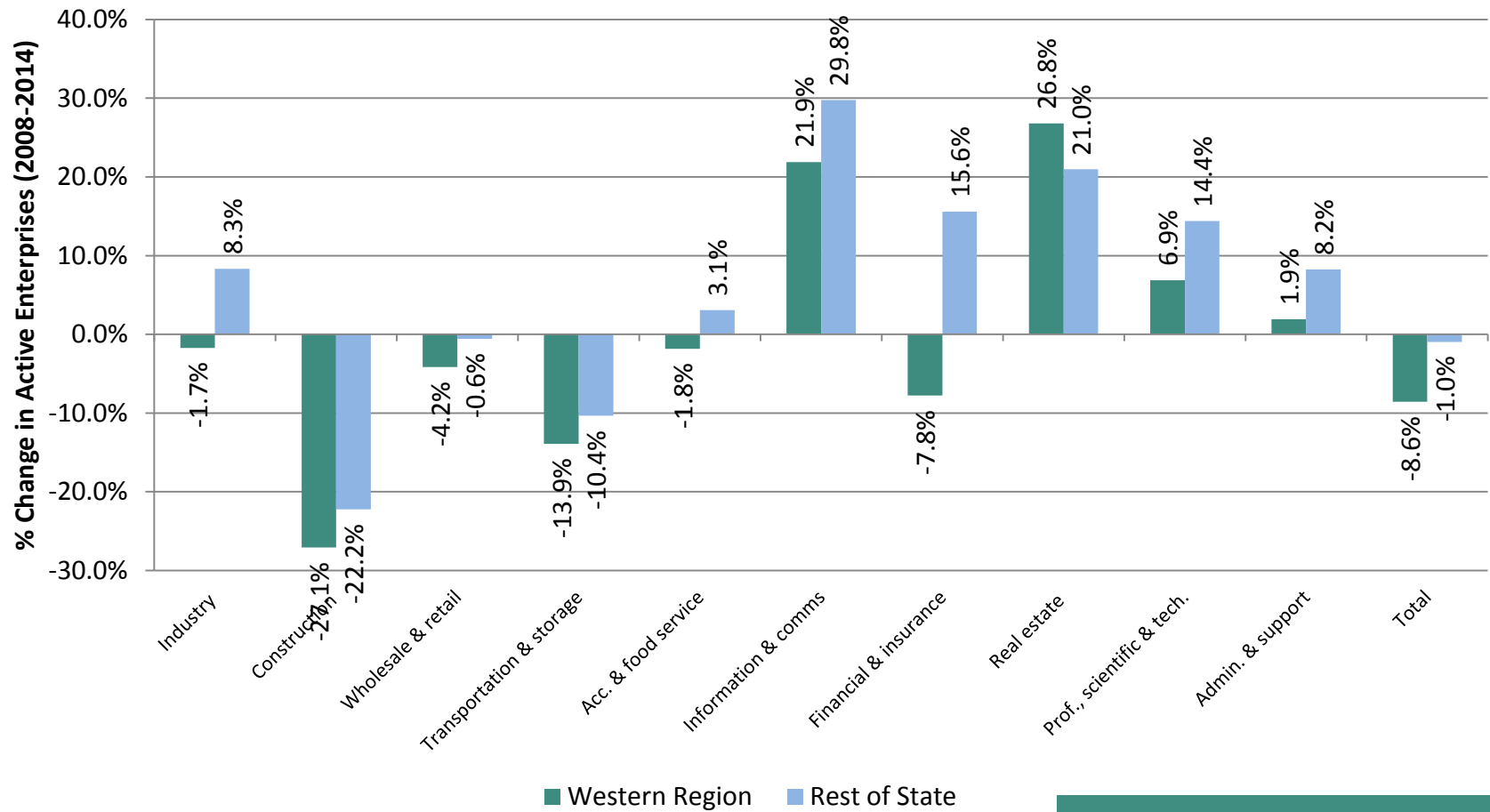
Greater contraction in enterprise numbers & weaker performance across all sectors

- Far greater decline in enterprise numbers in WR since 2008
- WR had a weaker performance – greater decline or lower growth – than RoS in every sector 2008-2014 (ex. real estate)
- Construction, Transportation & Storage, Financial & Insurance experienced greatest declines. For financial firms, contrast with strong growth in RoS
- WR's slight drop in industrial firms, with growth elsewhere, worrying given role of Industry in regional economy
- Strong growth in Real Estate, Information & Communications and Professional services

No. of active enterprises in Western Region, 2008-2014



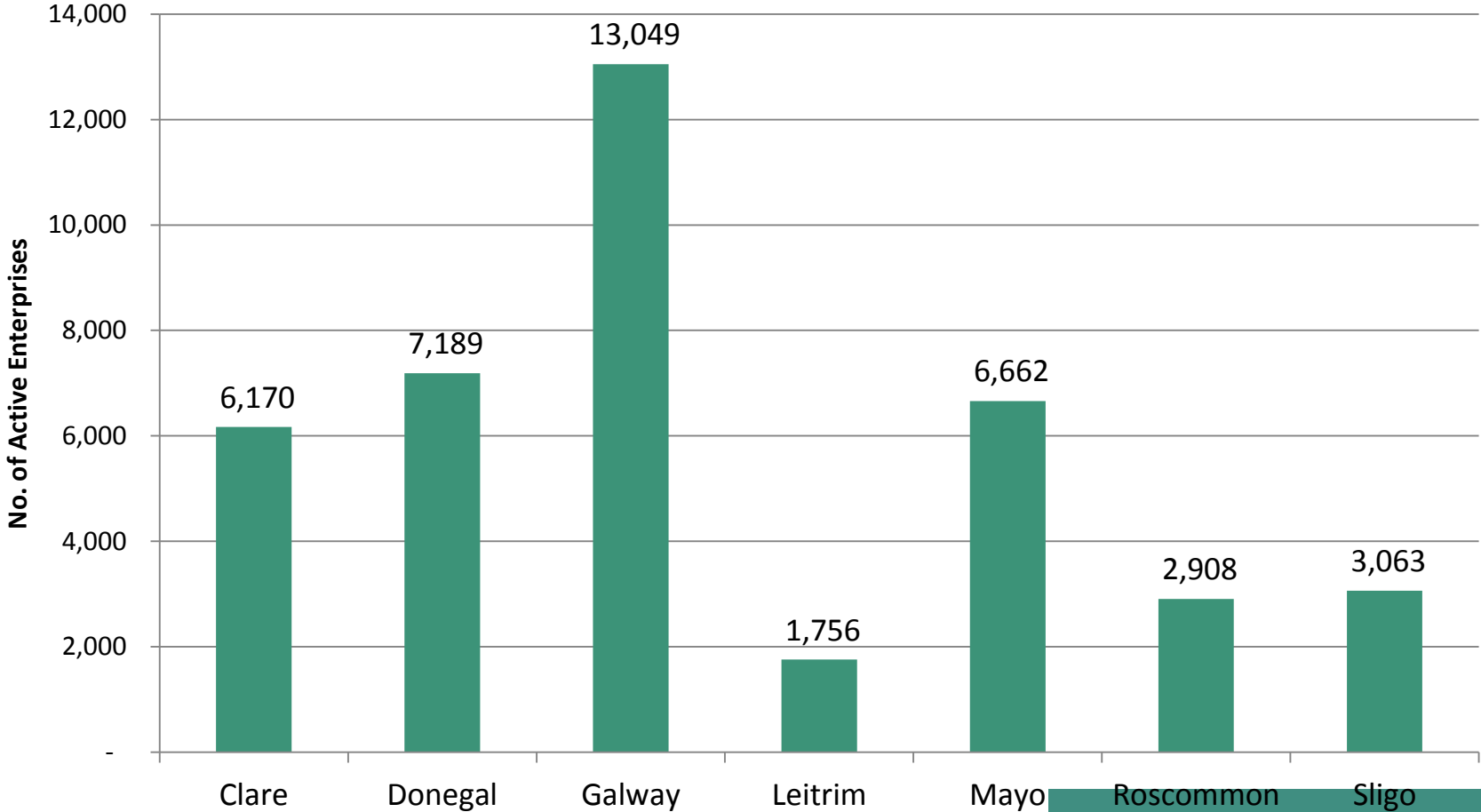
% change in number of active enterprises by sector in Western Region & Rest of State, 2008-2014



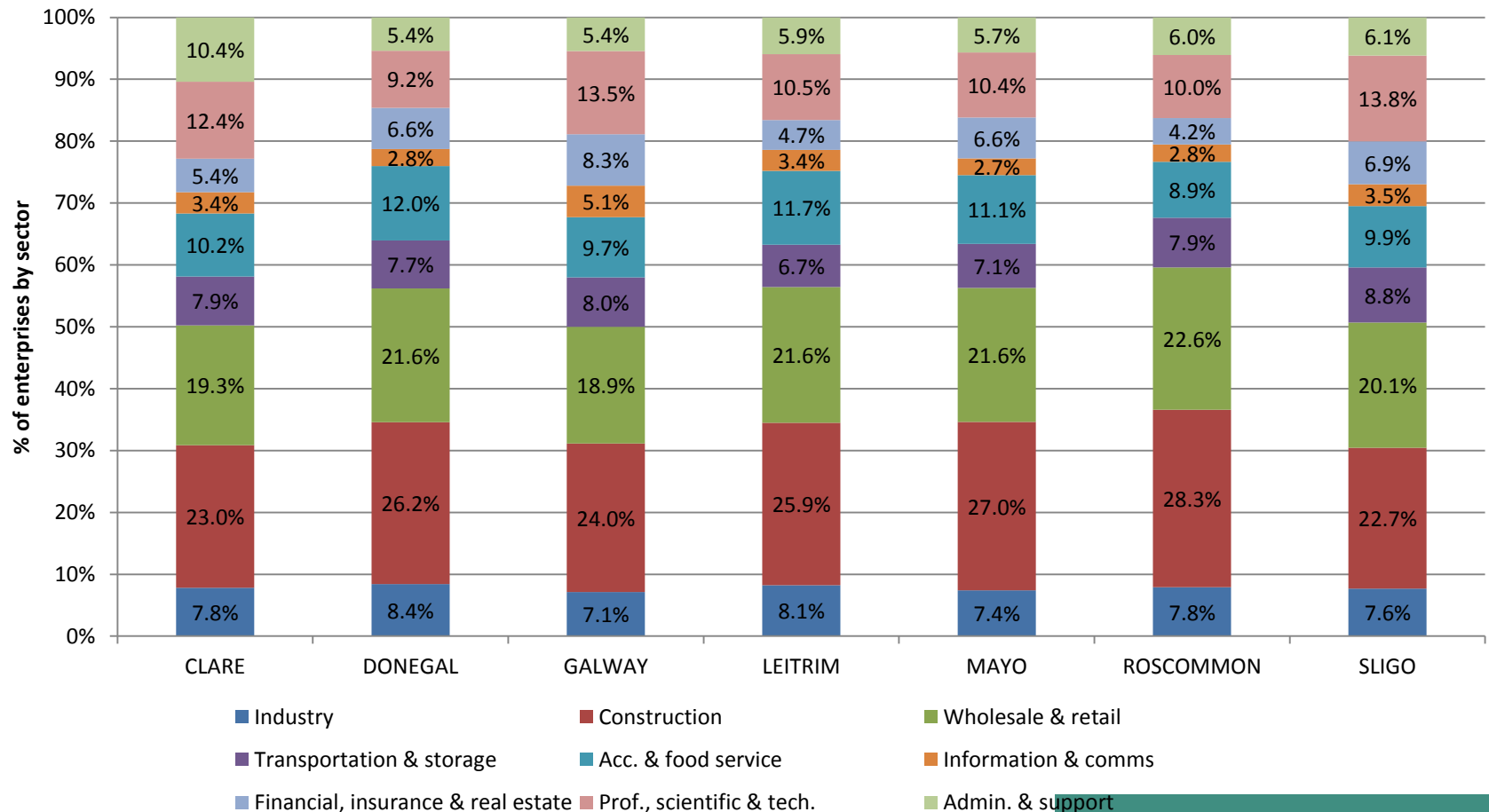
Enterprise base differs between more urban and more rural counties

- Construction, Wholesale & Retail largest sectors in all western counties but enterprise base differs
- Highly rural counties of Roscommon, Mayo & Donegal have 34-36% of enterprises in Industry & Construction but in more urban counties of Clare & Sligo it is around 30%.
- Higher share of enterprises in Galway & Sligo in knowledge services sectors, though even Galway below national average
- Over 40% of businesses in Donegal & Leitrim in local services; Galway has smallest share due to more diverse enterprise mix

No. of active enterprises in western counties, 2014

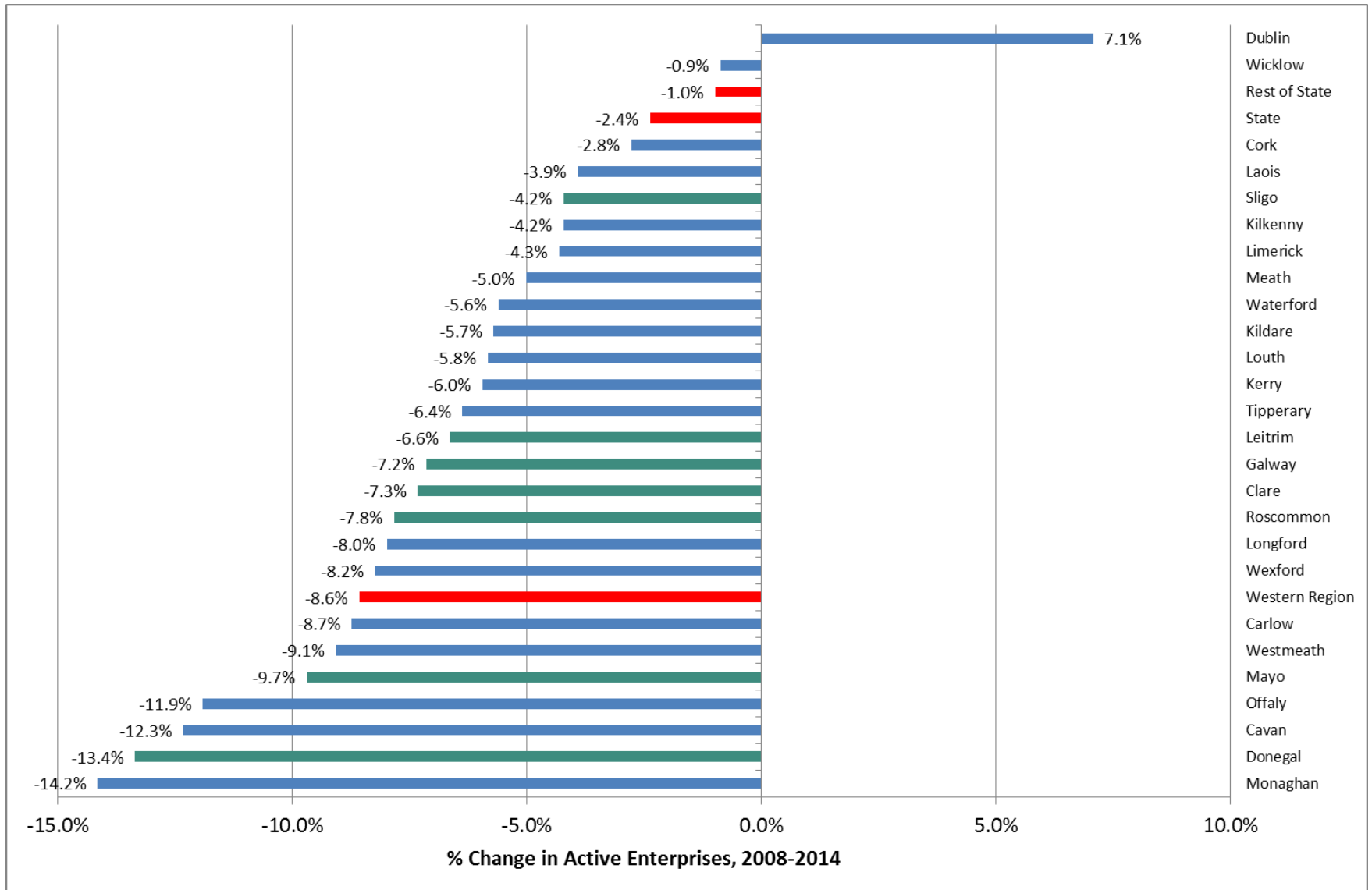


% of active enterprises by sector in western counties, 2014

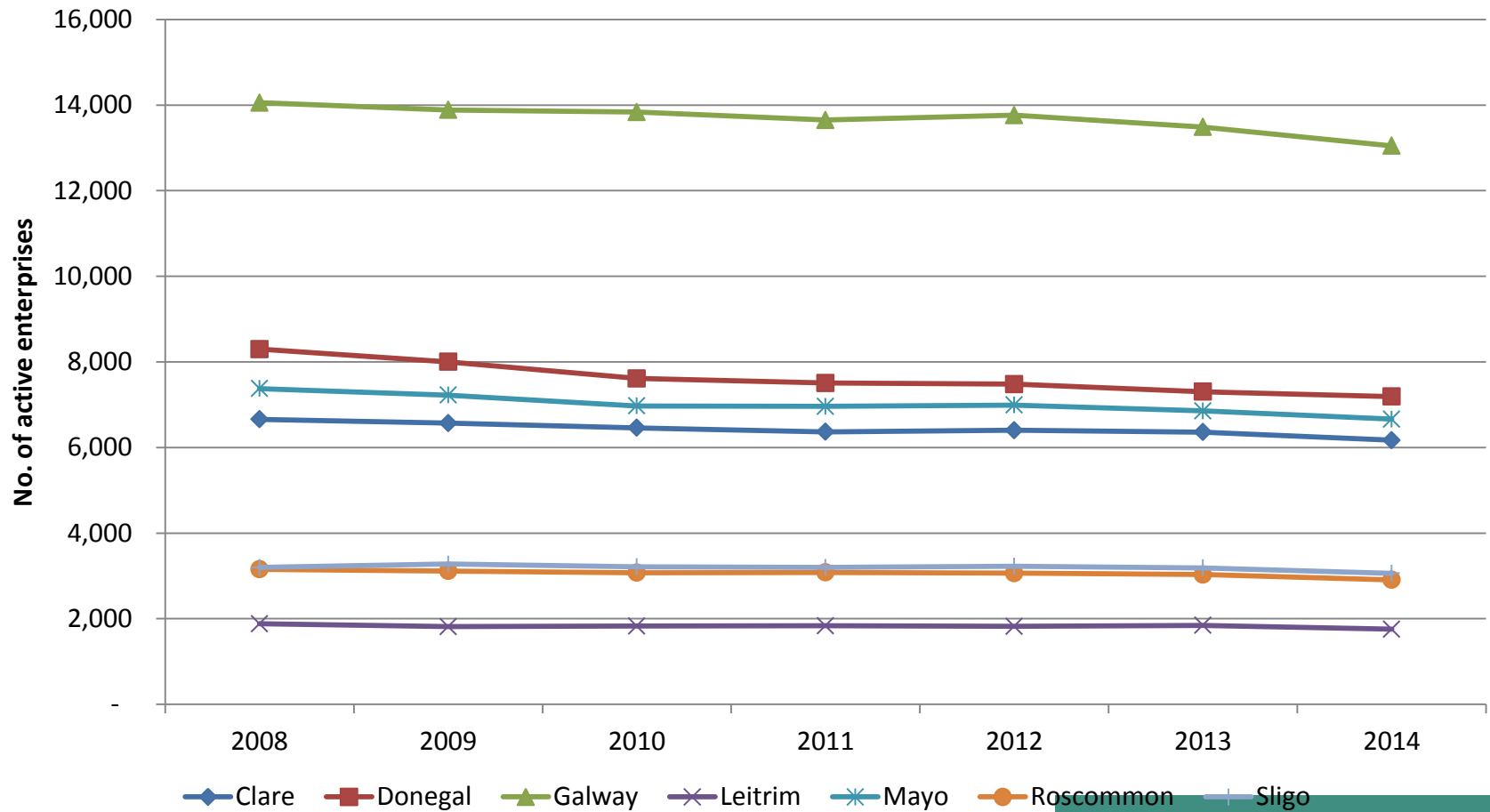


Large enterprise losses esp. in construction & local services, knowledge services growing

- Western counties had among the greatest losses of enterprises with recession
- Donegal lost more than 1 in 3 of its Construction firms, while Sligo and Clare, least reliant on the sector, had the smallest declines
- Wholesale & Retail declined most strongly in Donegal & Clare; Accommodation & Food Service declined across most counties
- Knowledge services performed best
 - In Leitrim, Mayo, Donegal & Galway, Information & Communications was the strongest growing sector;
 - Professional services increased in all counties but Leitrim;
 - Financial, Insurance & Real Estate grew in all counties



No. of active enterprises in western counties, 2008-2014



% change in number of enterprises by sector in western counties, 2008-2014

	Clare	Donegal	Galway	Leitrim	Mayo	Roscommon	Sligo
Industry	-0.2%	3.8%	-4.8%	6.0%	-9.1%	1.8%	3.5%
Construction	-21.8%	-35.6%	-26.1%	-22.1%	-26.4%	-25.3%	-21.9%
Wholesale & Retail	-6.4%	-6.6%	-1.6%	-2.1%	-5.6%	-1.1%	-4.5%
Transportation & Storage	-16.1%	-14.2%	-14.8%	-13.2%	-16.9%	-2.5%	-9.1%
Acc. & Food service	-10.3%	0.0%	1.4%	-1.9%	-1.1%	-4.1%	-1.0%
Information & Comms	-1.4%	26.6%	22.1%	47.5%	45.9%	29.0%	18.9%
Financial, Ins & Real Estate*	9.9%	26.5%	16.3%	31.7%	23.0%	35.2%	19.2%
Prof., Scientific & Technical	8.2%	2.2%	6.7%	-2.1%	7.1%	8.2%	17.2%
Admin & Support	8.7%	-3.2%	-3.9%	-	-11.3%	-4.4%	-3.6%
Total	-7.3%	-13.4%	-7.2%	-6.6%	-9.7%	-7.8%	-4.2%

WDC Policy Analysis work – 2017

- Census results will be published throughout 2017
 - Analysis for the Western Region
 - Particular focus on demographics, education, employment, enterprise and travel catchments
- National Planning Framework & Regional Economic & Spatial Strategies
 - Currently being prepared
 - Important we feed into this process
- Brexit analysis – Action Plan for Rural Development: Action 100
- On going analysis and interpretation of key data
 - e.g. QNHS, Business Demography, County Incomes
 - Other local data from different sources e.g. Revenue, government spending
- Preparation of Policy Briefings, *WDC Insights* publications, Blog Posts
- Making Relevant Submissions

Thank You

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