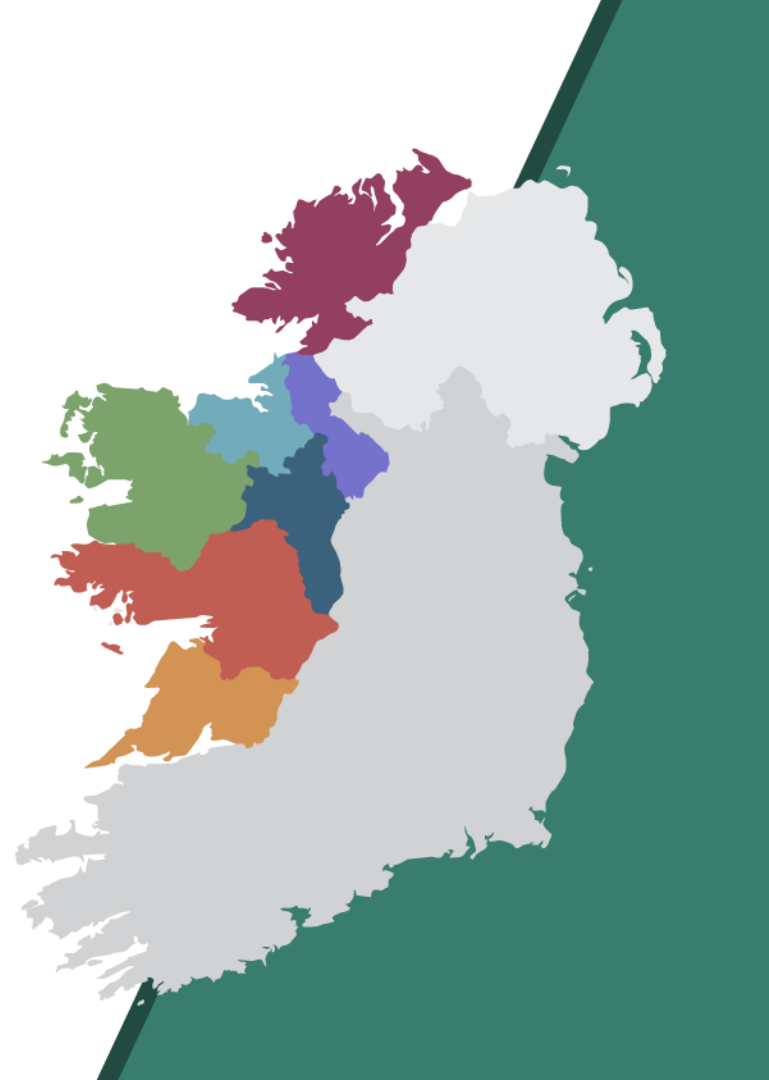


# **WDC Presentation to Galway Chamber of Commerce**

**Deirdre Frost, Policy Analyst  
Western Development Commission**

**2 April 2019**



# Western Development Commission (WDC)

- 7 county Western Region
- State body – Department of Rural and Community Development (DRCD)
- WDC Act 1998

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



## Regional Promotion

- Lookwest.ie
- Community & Diaspora engagement

## Regional Leadership

- Policy analysis
- AEC
- Creative Economy

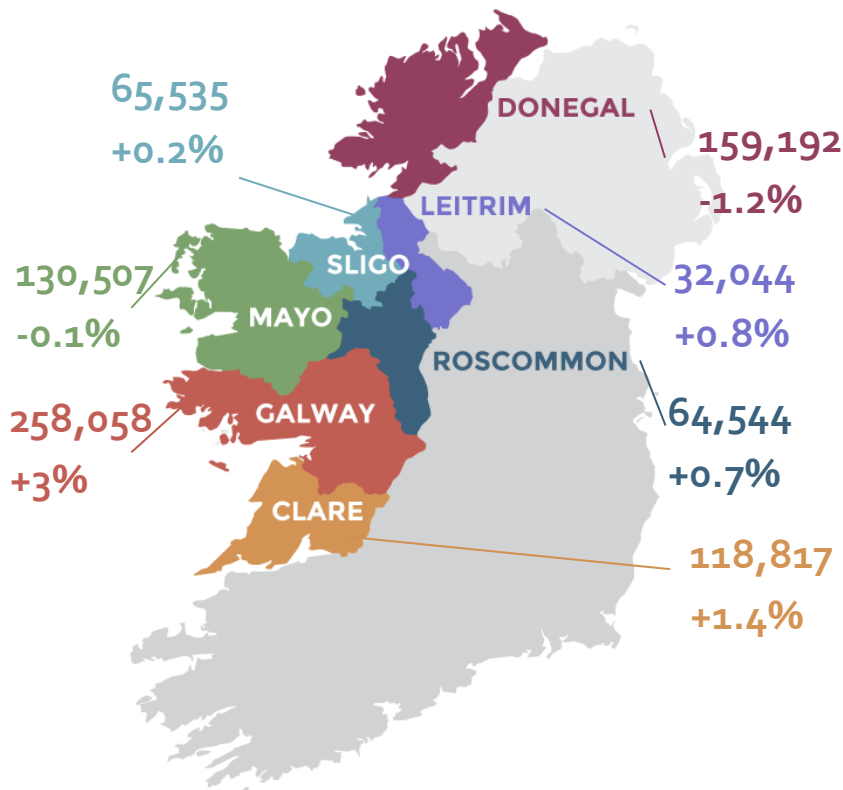
## Sustainable Enterprise

- Western Investment Fund
- Social Enterprise
- Emerging Sectors

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

# The Western Region – 2016 Profile

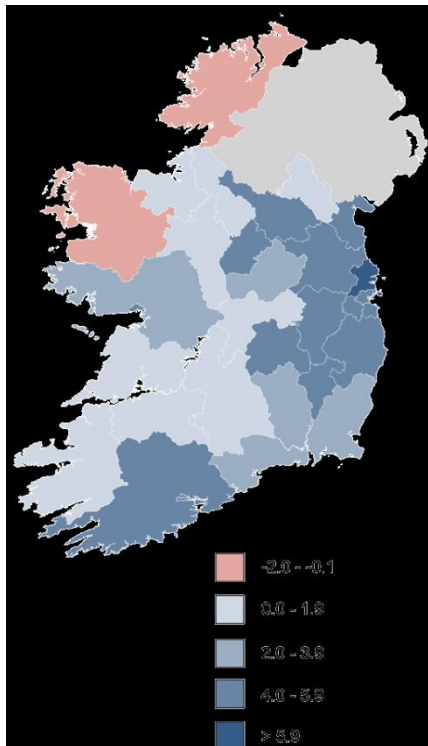
- 828,697 people (2016)
- Share of national population
  - 1841: 30.7%
  - 2016: 17.4%
- Population change 2011-2016
  - 0.95% in WR v 3.8% in State
  - Home to only 2 counties in Ireland with pop decline
- **64.7% live in rural areas v 37% in State**
- Urban centres: 1 city; 5 towns 10,000+; 34 towns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



# WR Region Profile – Census 2016: Population Change

|               | 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   | <b>453,109</b>  | <b>7,753</b>                    | <b>1.7</b>                        |
| 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

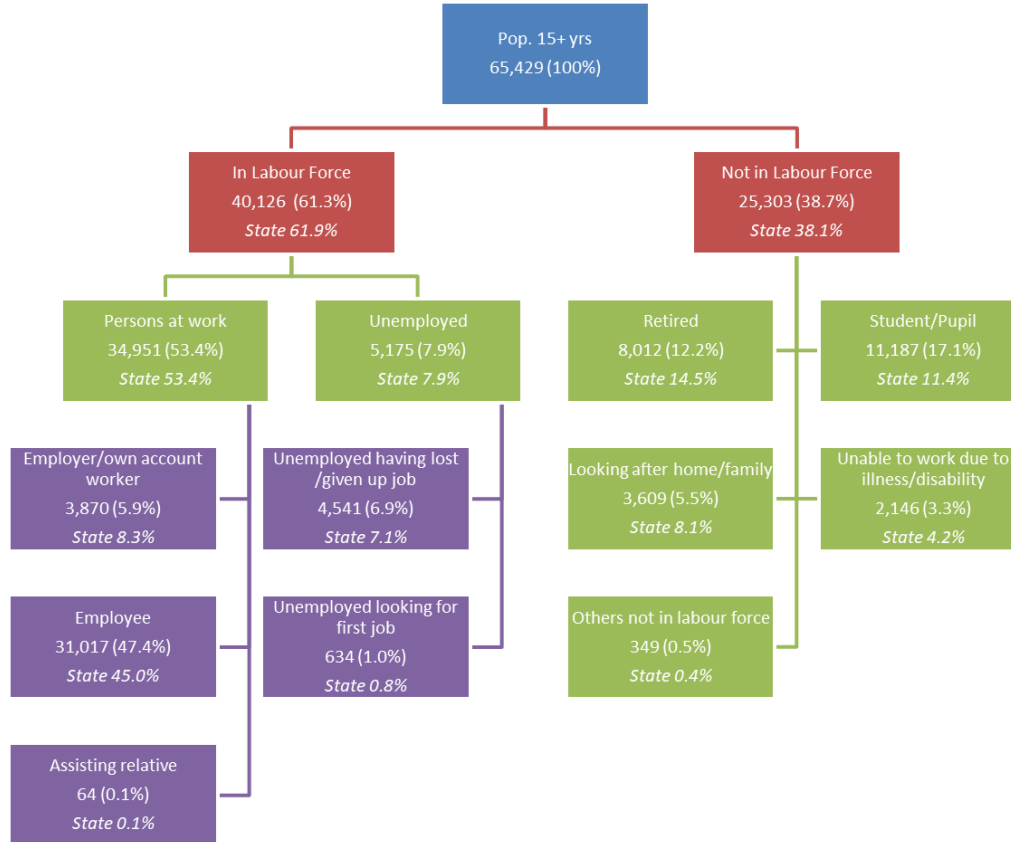
# WR profile – Census 2016: Age structure

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- **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 3<sup>rd</sup> level and people 65 yrs+ continuing to work



# Population of Galway City by Labour Force Status 2016

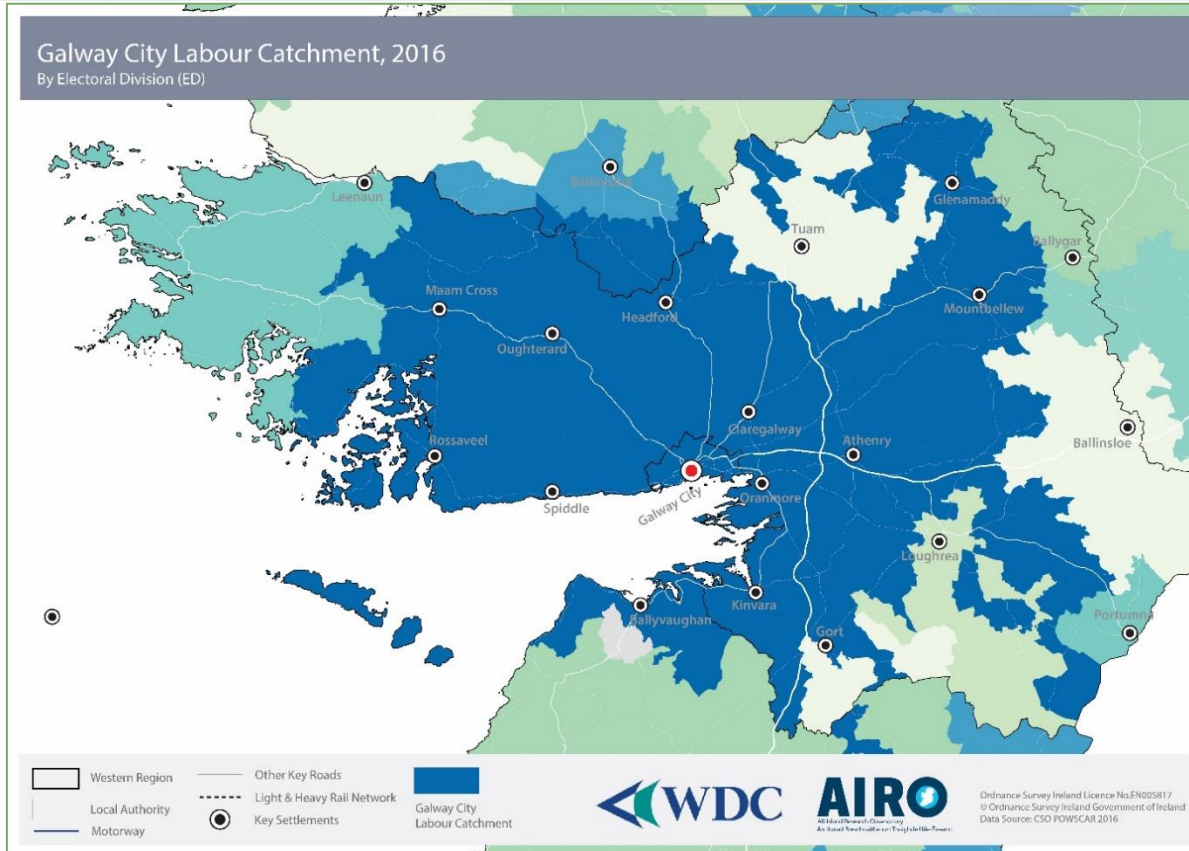


# Which Galway?

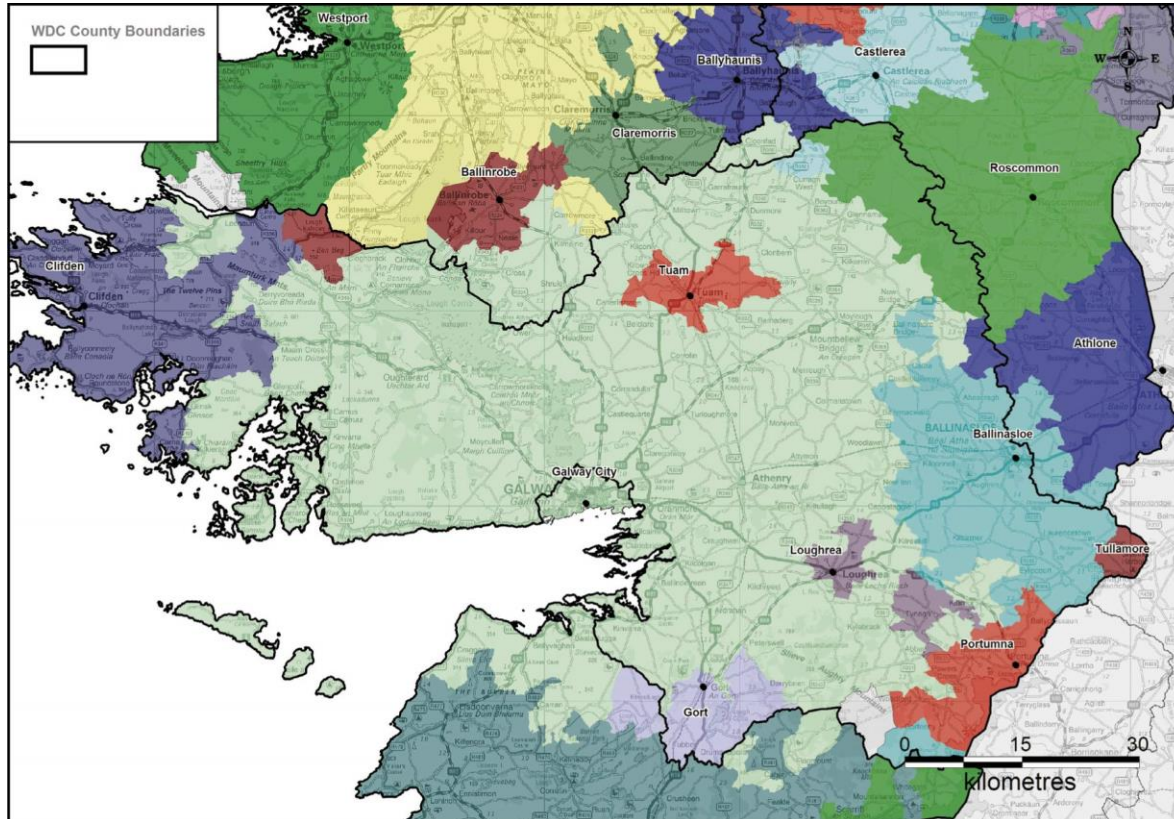
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- Which measure for Galway?
- Depends on function/ role...
- Urban workers/rural dwellers
- WDC Galway city TTWA (roughly equal to Galway county)
- Galway Metropolitan Areas - MASP
- Which comparator? Other cities & their catchments, Nat Av? GDA? Eastern & Midlands Region
  
- Data dependent..(Census, IDA, EI data..)

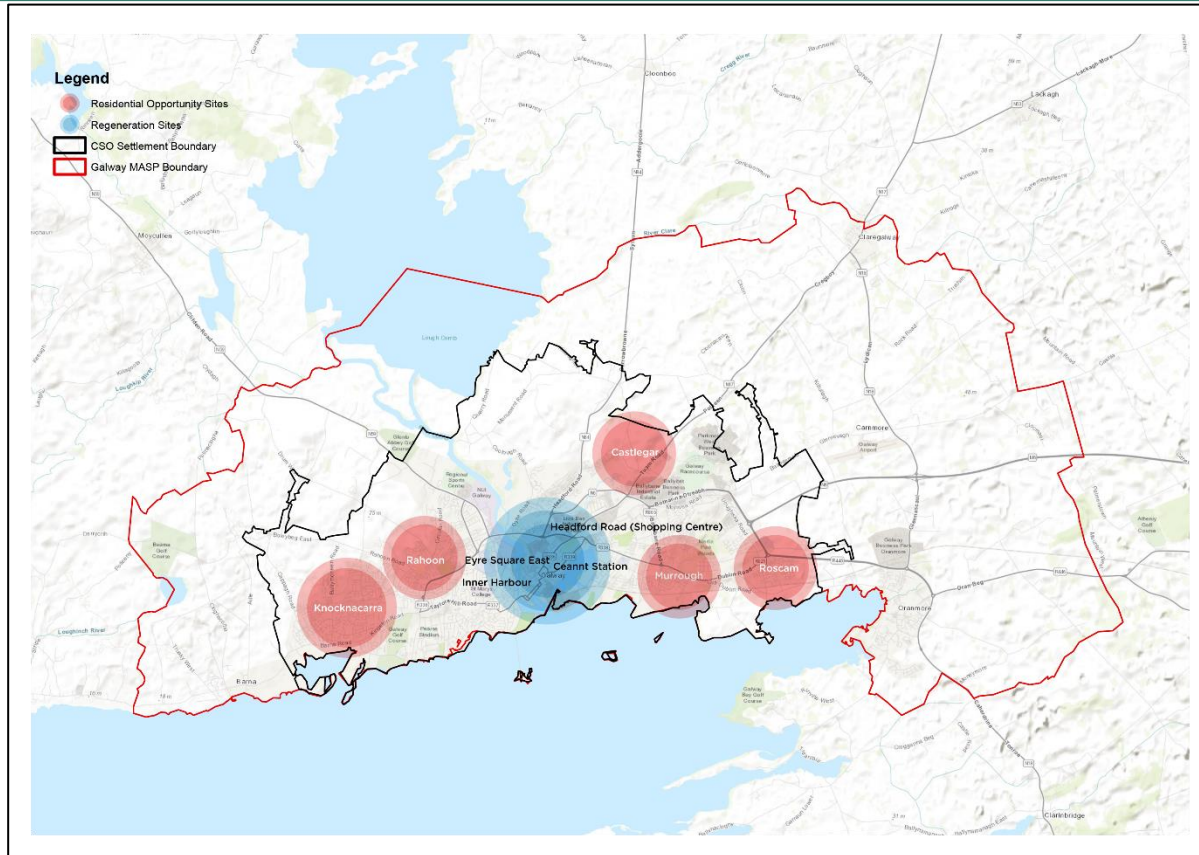
# Galway TTWA 2016



# Galway TTWA 2006

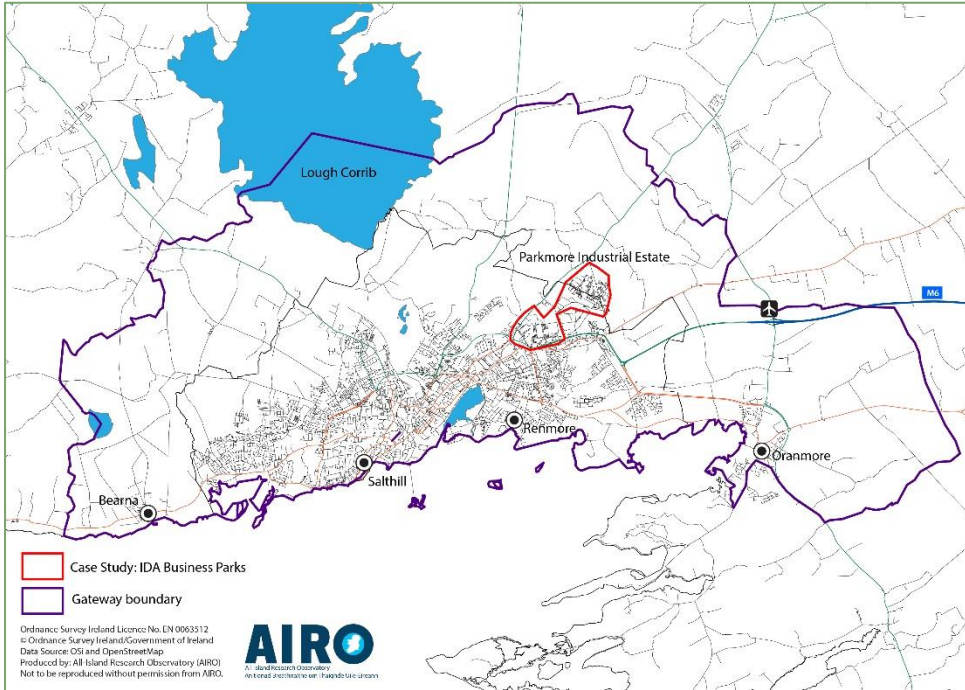


# Galway MASP





# Rural Dwellers, Urban Jobs - Inward commuters



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

# Outward commuters – to Dublin city

| Travelling to work in Dublin city | 2006 |        |                | 2016 |        |                |
|-----------------------------------|------|--------|----------------|------|--------|----------------|
|                                   | N    | Total  | Share of total | N    | Total  | Share of total |
| <b>Galway</b>                     | 411  | 64,455 | 0.63           | 971  | 70,170 | 1.4            |
| <b>Sligo</b>                      | 141  | 20,321 | 0.69           | 329  | 21,834 | 1.5            |
| <b>Ennis</b>                      | 95   | 21,333 | 0.44           | 265  | 21,409 | 1.2            |

# Factors influencing the trends

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



# Some policy implications for Galway

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- Improved transport links important
- People will commute for good work opportunities
- More effective intra-regional transport links e.g. M18 extending labour catchments & open new opportunities e.g. to Limerick, Shannon, Ennis – will support Chambers city regions initiative
- Numbers travelling from Galway to Ennis and Shannon to work has doubled in the 10 yrs (06-16)
- Residence more stable than employment location

# Futures – NPF 2040 Vision?

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- Plan to move from 'Business as Usual' – Really?
- But focus on 5 cities and importance of Capital!
- Implementation – the importance of sectoral policy as an instrument of change – both capital & current spending
- Overall WDC welcomes regional population targets but feels there is little specific to help deliver.
- Need for better links, investment and IMPLEMENTATION!
  
- *WDC Comment*
  - *Need review of policies e.g National Ports & Aviation policy to move away from 'business as usual'.*
  - *Delivering Atlantic Corridor road projects (N17/15/13) should be prioritised earlier (no commitment in NDP to begin construction before 2027).*
  - *All rail routes in region need improved capacity & services, electrification should be considered for rail routes to NWRA.*

# Capital Investment – 10 year plan

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- Alignment with NPF objectives – But much investment to happen later
- **Infrastructure**
  - Communications: National Broadband Plan
  - Transport, **Roads** – Inter-regional links; Atlantic Corridor Limerick to Letterkenny, N6- Galway City by-pass, (N4&N5), Secondary, regional & local roads, **Air** – Ireland West & Shannon, **Rail & bus Transport** – accessibility for workers and residents
  - Energy infrastructure
- **BUT Investment in Human capital** – a Strong and vibrant third level sector supporting the 3 E's: education, employment & enterprise, allied to investment in infrastructure and innovation is the recipe for Growth!

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

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

# Strengths & weaknesses

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

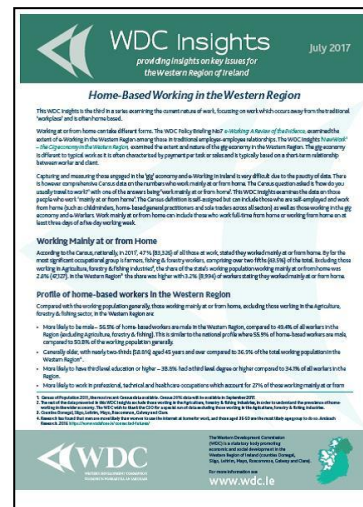
# Opportunities & Threats

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- City regions – Chambers, NPF & AEC GESL, NWRA/SRA
- Regional growth sectors
- Quality of life & congestion elsewhere
- Galway Chamber priorities need to be reflected in Govt Policy – in NPF 2040, RSES, AEC Infrastructure priorities
  
- Lack of implementation of NPF/ RSES
- Competition - Not other regional cities!
- Need to work with regional cities - GESL to act as counterbalance

# Further Information – WDC Insights

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



# WDC Insights - the Policy team blog

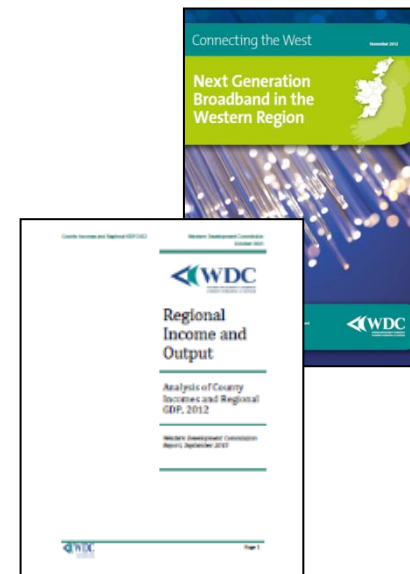
- Weekly blog on variety of topics: data analysis, policy comment, news and policy issues
- **115** blog posts to date
- **40** blog followers, posts are **tweeted**
- Recent items: Census, income and poverty, RSES
- Follow the WDC Policy Analysis Team Blog at <https://wdcinsights.wordpress.com/>





# WDC Reports & Submissions

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

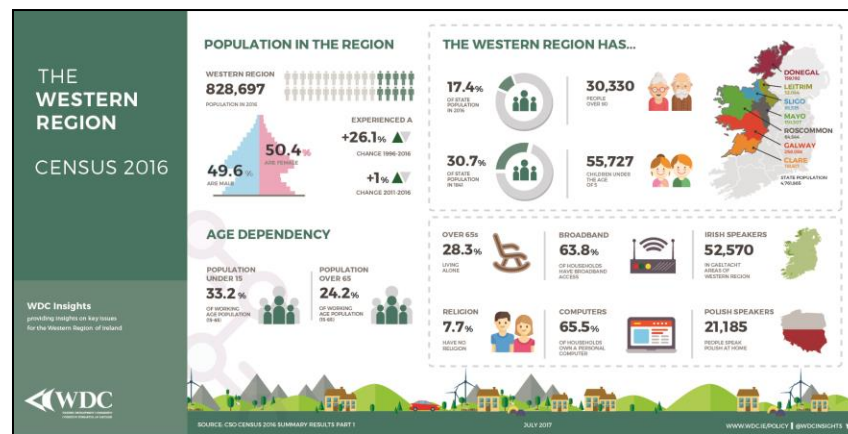
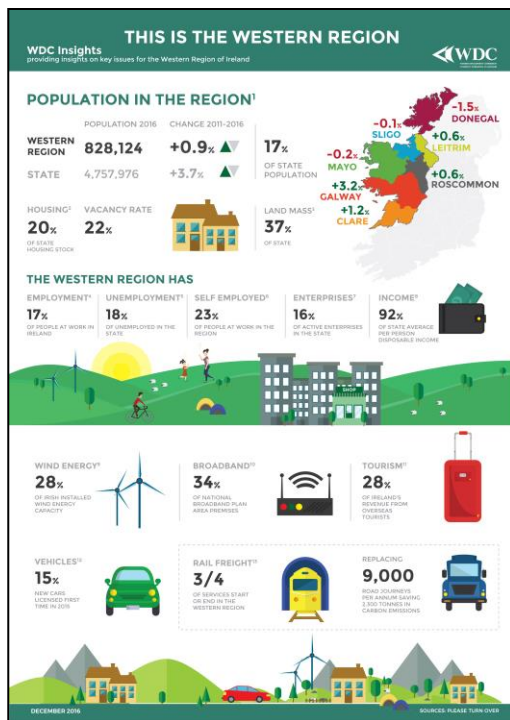


# WDC Policy Briefings

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



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



# Thank You

## Q & A



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[www.wdc.ie](http://www.wdc.ie)

