WESTERN DEVELOPMENT COMMISSION

Timely Economic Indicators for the Western Region

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WDC Insights
Providing insights on key issues for the Western Region of Ireland

Introduction

The Western Development Commission (WDC) has compiled a set of timely economic indicators to help assess economic activity in the Western Region (WR) and Atlantic Economic Corridor (AEC) closer to real-time.[1] The indicators chosen are all published at least quarterly by official sources and can provide insight on what to expect once further official data become available. See the detailed methodology **here**. The report is largely statistical, please see the accompanying **WDC Insights Blog** for a commentary.

The WDC acknowledges that the indicator set is limited given the availability of official high-frequency county-level economic data. To address this limitation **supplementary ad-hoc reports** based on alternative data sources are produced. The WDC has recently released a comprehensive regional analysis of the economic impact of COVID during 2020, **Regional Economic Impact of COVID-19: 2020 in Economic Statistics**.

What is covered in the timely economic indicator set?

Table.1. Timely Economic Indicator Set

Labour Market

- Persons in receipt of the Pandemic Unemployment Payment (PUP)
- Persons in receipt of the Temporary Wage Subsidy Scheme (TWSS/EWSS)
- Persons on the Live Register (LR)

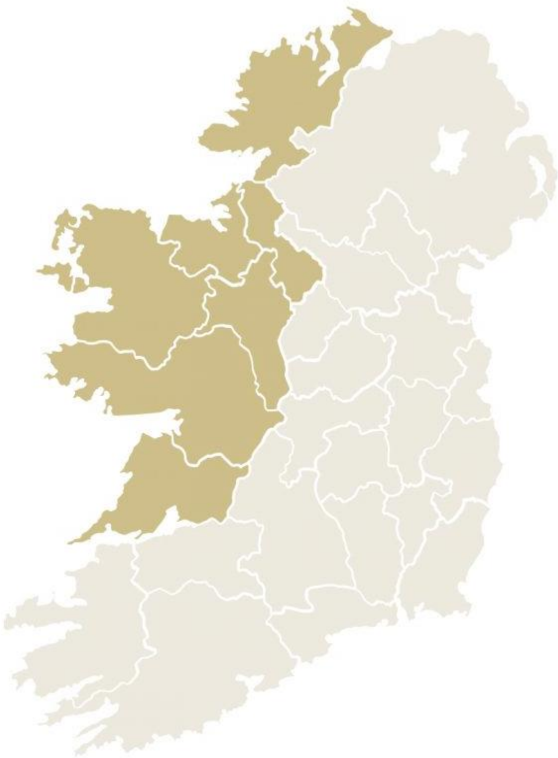
Consumption

- Vehicles licensed for the first time

Housing & Construction

- New dwelling completions
- Planning permissions
- Commencement notices
- House prices & rents

Figure 1. The Western Region



[1] Under the WDC Act 1998 the WDC's statutory remit is to *'…foster and promote the economic and social development of the Western Region'*. The Western Region is the seven counties of Mayo, Roscommon, Galway, Sligo, Leitrim, Donegal and Clare. The AEC is set out in Ireland 2040 as an initiative to drive balanced regional development and encompasses the Western Region as well as Kerry and Limerick.

Why timely economic indicators are particularly important at the regional level?

The lag between the data reference period and the publication of official national income accounts and other economic statistics has prompted considerable effort into the development of national real-time economic indicators. The lag is often considerably longer for county and regional data. For example, the latest available regional income accounts relate to 2018 and 2019 and were published in February 2021, a lag of up to thirty-six months between the data reference period and publication. This demonstrates the need for timelier regional and county level indicators of economic activity.

Insights on Regional Economic Activity

Labour Market

- Declines in persons receiving the PUP, EWSS and on the live register from February to May suggest flows into employment.
- Persons receiving the PUP are at the lowest levels since the onset of the pandemic. At the end of July, 30,165 persons received the PUP (8% of the labour force). PUP claims in the WR have consistently declined from February, having reached 82,249 (20% of the labour force).
- EWSS supports as a share of the labour force in the WR and AEC have been below the national average since November. At the end of May, 10.6% of the WR labour force were estimated to receive a wage subsidy compared with 11.9% nationally.

Consumption

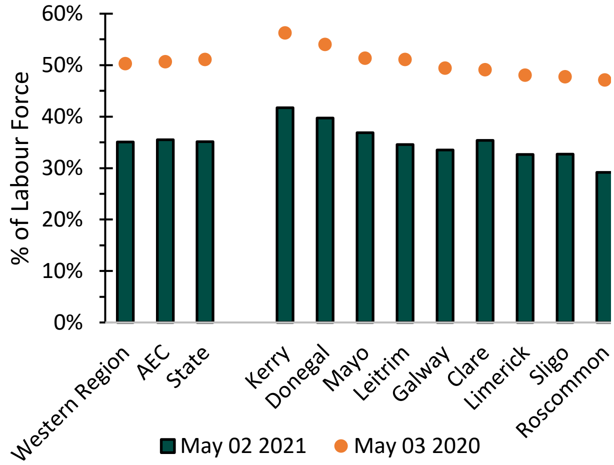
- There was a sharp rise in new private car registrations during the second quarter of 2021. However, registrations in the first half (H1) of 2021 remained below pre-pandemic levels.
- New goods vehicle registrations in the AEC and WR were above pre-pandemic levels during H1 2021.

Housing & Construction

- From Jan-May, sales volumes were above pre-pandemic levels in the WR and AEC. However, the supply of available properties has not kept pace with demand. The lack of supply has meant that the increase in demand has driven up sales prices and rents, particularly in rural and coastal areas (see accompanying **Insights blog post**).

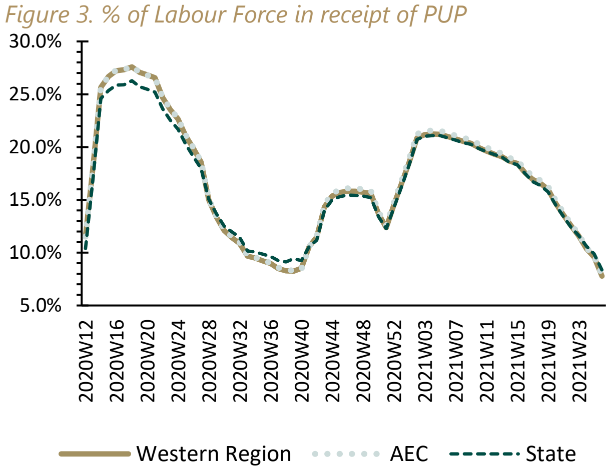
Labour Market

Figure 2. % of Labour Force in receipt of PUP or Wage Subsidy or on the Live Register.



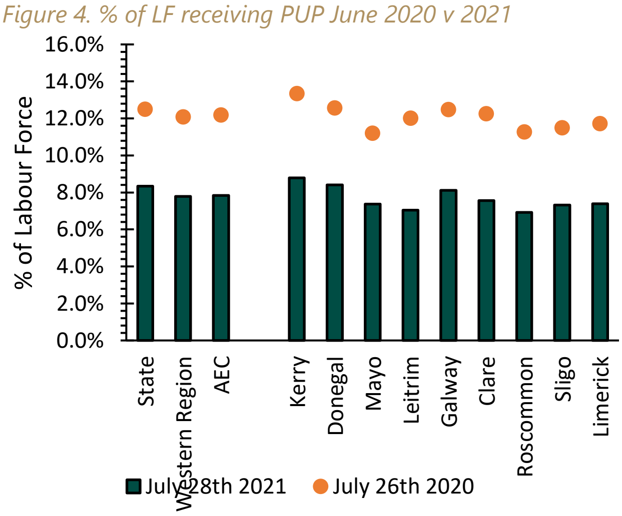
Source: Calculations from CSO Live Register (26/7/21)

Figure 3. % of Labour Force in receipt of PUP



Source: Calculations from CSO Live Register (26/7/21) and DSP (28/7/21)

Figure 4. % of LF receiving PUP June 2020 v 2021



Source: Calculations from CSO Live Register (26/7/21)

Declines across PUP, EWSS and Live Register suggest flows into employment

- The % of the Labour Force (LF) either receiving the PUP, EWSS or on the live register has fallen consistently since February. Declines in all three categories suggest a flow into employment.
- The share of the WR (AEC) labour force in one of those three categories stood at 35% (36%) at the start of May 2021 compared with over 50% in May 2020.

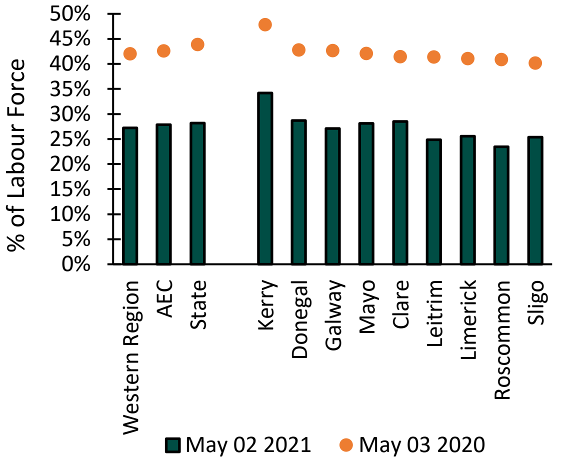
PUP claims fall sharply from February

- During February, WR (AEC) PUP claims reached 82,249 (117,986), 21% of the LF.
- PUP claims have declined considerably to the lowest level since the onset of the pandemic at 30,165 (42,973) or 8% of the LF, by the end of July.

Large Decline in PUP share of the labour force compared with last year.

- At the end of July, 7.8% of the WR & AEC Labour Force (LF) received the PUP. In July 2020, the figure was 12%.
- At the end of July, Kerry (8.8%) had the highest PUP share of the labour force in the AEC, and Roscommon (6.8%) had the lowest.

Figure 5. % of Labour Force in receipt of PUP or Wage Subsidy

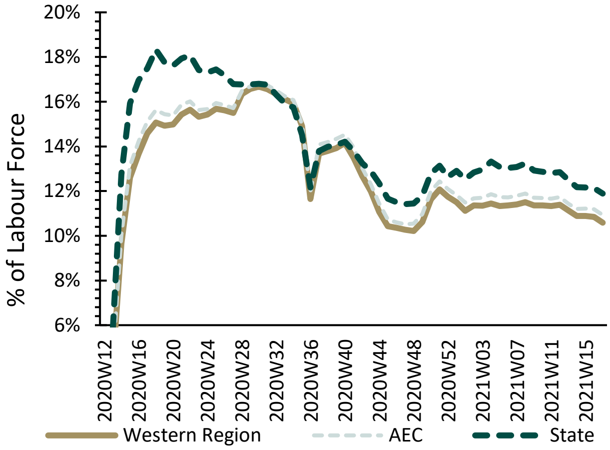


Source: Calculations from CSO Live Register (26/7/21)

Decline in Total COVID income supports

- The % of the LF receiving either the wage subsidy or PUP has declined since February where claims ranged from 28.5% in Roscommon to 40% in Kerry.
- At the start of May, the % of the LF supported by either the PUP or EWSS fell to a range of 23% in Roscommon to 34% in Kerry.

Figure 6. % of Labour Force in receipt of Wage Subsidy

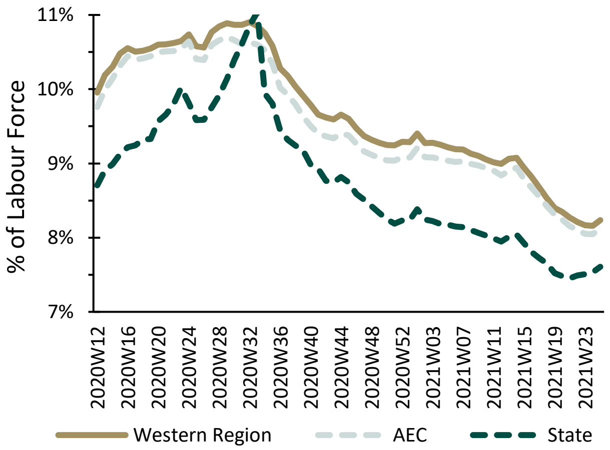


Source: Calculations from CSO Live Register (26/7/21)

Lower Wage Subsidy Supports in WR & AEC

- The estimated number of persons supported by the EWSS as a share of the labour force has been lower than the national average in the AEC & WR since October 2020.
- During the first week of May, WR (AEC) claims reached 41,044 (59,846) or 10-11% of the LF. The national average was 12%.

Figure 7. Persons on the Live Register as % of Labour Force



Source: Own Calculations from Revenue COVID-19 Support Schemes statistics

Declines in numbers on the live register

- The % of the LF in the WR & AEC on the live register has declined since September 2020 having peaked at 11%.
- At the end of June 2021, the figure stood at 8%.

Table 2. Total Persons in Receipt of PUP and as % of Labour Force (LF) by County.

	May 3rd 2020	Feb 2021	July 28th 2021
Clare	14,968 (26.5%)	11,760 (20.8%)	4,278 (7.6%)
Donegal	22,710 (31.9%)	16,539 (23.2%)	5,983 (8.4%)
Galway	33,324 (26.6%)	25,835 (20.6%)	10,159 (8.1%)
Leitrim	4,064 (27.3%)	3,018 (20.3%)	1,050 (7.1%)
Mayo	16,480 (27.5%)	13,281 (22.1%)	4,428 (7.4%)
Roscommon	7,645 (25.8%)	5,742 (19.4%)	2,054 (6.9%)
Sligo	7,782 (25.7%)	6,074 (20.1%)	2,213 (7.3%)
Western Region	106,973 (27.6%)	82,249 (21.2%)	30,165 (7.8%)
Limerick	22,100 (24.5%)	17,125 (19.0%)	6,666 (7.4%)
Kerry	22,344 (32.%)	18,612 (26.6%)	6,142 (8.8%)
AEC	151,417 (27.6%)	117,986 (21.5%)	42,973 (7.8%)
State	605,542 (26.3%)	485,810 (21.1%)	192,296 (8.3%)

Table 3. Estimated Persons in Receipt of Wage Subsidy and as % of LF by County.

	May 3rd 2020	Year End 2020	May 2nd 2021
Clare	8,772 (15.5%)	7,217 (12.8%)	6,801 (12.0%)
Donegal	8,127 (11.4%)	8,395 (11.8%)	7,313 (10.3%)
Galway	20,954 (16.7%)	15,439 (12.3%)	13,326 (10.6%)
Leitrim	2,187 (14.7%)	1,427 (9.6%)	1,344 (9.0%)
Mayo	9,140 (15.2%)	6,840 (11.4%)	6,643 (11.1%)
Roscommon	4,691 (15.8%)	2,900 (9.8%)	2,635 (8.9%)
Sligo	4,542 (15.0%)	3,308 (10.9%)	2,982 (9.9%)
Western Region	58,413 (15.1%)	44,581 (11.7%)	41,044 (10.6%)
Limerick	15,597 (17.3%)	10,703 (11.9%)	9,903 (11.0%)
Kerry	11,560 (16.5%)	10,027 (14.3%)	8,899 (12.7%)
AEC	85,570 (15.6%)	66,256 (11.8%)	59,846 (10.9%)
State	422,224 (18.3%)	291,010 (12.6%)	273,959 (11.9%)

Table 4 Estimated Persons in Receipt of PUP or Wage Subsidy or on the Live Register and as % of LF by County.

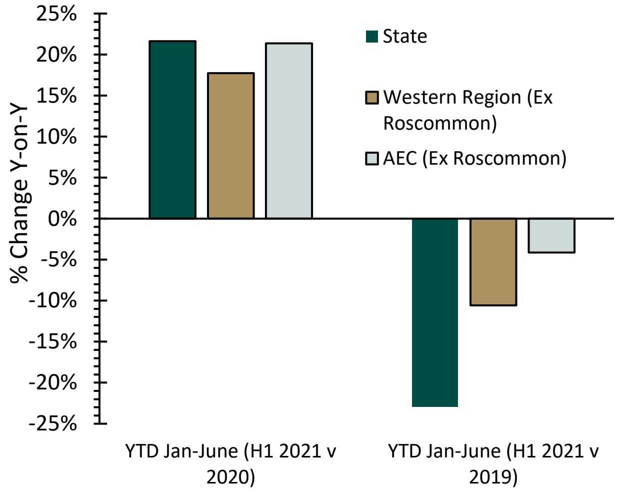
	May 3rd 2020	Year End 2020	May 2nd 2021
Clare	27,764 (49.1%)	18,689 (33.1%)	19,990 (35.4%)
Donegal	38,464 (54.0%)	26,928 (39.0%)	28,275 (39.7%)
Galway	61,855 (49.4%)	39,193 (31.3%)	41,924 (33.5%)
Leitrim	7,614 (51.1%)	4,802 (32.2%)	5,145 (34.6%)
Mayo	30,842 (51.4%)	20,131 (33.5%)	22,140 (36.9%)
Roscommon	13,976 (47.1%)	7,996 (27.0%)	8,643 (29.1%)
Sligo	14,443 (47.7%)	9,349 (30.9%)	9,900 (32.7%)
Western Region	194,958 (50.3%)	132,603 (32.8%)	136,017 (35.1%)
Limerick	43,344 (48.1%)	27,150 (30.1%)	29,435 (32.7%)
Kerry	39,335 (56.3%)	27,198 (38.9%)	29,175 (41.7%)
AEC	277,637 (50.7%)	189,010 (33.1%)	194, 627 (35.5%)
State	1,178,211 (51.1%)	750,427 (32.6%)	808,934 (35.1%)

Source for Tables 2-4: Calculations from CSO Live Register (26/7/21) *and DSP (28/7/21).*

Consumption

New Private Cars

Figure 8. Year on Year % change in New Private Cars Licensed for the First Time



*Source: Own Calculations from CS0 (TEM22) *Ex. Roscommon, as it distorts the WR/AEC aggregates due to the activity of a national car hire company see **here.***

Sharp Growth in Q2 2021 but 2021 still below pre-pandemic levels.

- Total new car registrations rose during the first half (H1) of 2021, 18-21% in the WR and AEC, year-on-year. Nationally, registrations rose 22%.
- Registrations are still below the levels observed in 2019. Compared with H1 2019, registrations were 4-11% lower in the WR & AEC. Nationally, registrations were 23% lower.
- Data for July will be highly informative as July, as well as January, are the key months for new car sales due to the **dual registration system**.

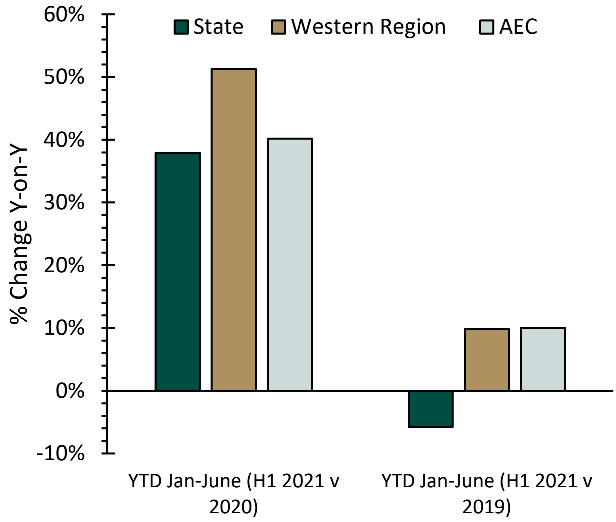
Table 5. New Private Cars Licensed for the First Time.

Month	2019 Q1	2020 Q1	2021 Q1	2019 Q2	2020 Q2	2021 Q2	2019 H1	2020 H1	2021 H1
Donegal	1109	1043	1015	409	156	440	1518	1199	1455
Leitrim	198	218	189	86	31	77	284	249	266
Sligo	553	557	476	168	41	229	721	598	705
Galway	1926	1807	1621	640	197	739	2566	2004	2360
Mayo	956	901	784	290	94	300	1246	995	1084
Clare	1116	1029	964	377	105	371	1493	1134	1335
Roscommon	1331	761	488	1898	48	644	3229	809	1132
Western Region (Ex Roscommon)	5858	5555	5049	1970	624	2156	7828	6179	7205
Limerick	1898	1784	1641	1641	666	184	2564	1968	2265
Kerry	1109	1077	995	397	101	413	1506	1178	1408
AEC (Ex Roscommon)	8865	8416	7685	3033	909	3193	11898	9325	10878
State	50861	44167	39292	26778	5017	20531	77639	49184	59823

Source: CS0 (TEM22)

New Goods Vehicles

Figure 9. Year on Year % change in New Goods Vehicles Licensed for the First Time.



Source: Own Calculations from CS0 (TEM14). October was excluded from both years as no data for October 2020 was available.

New Goods Vehicle Registrations above pre-pandemic Levels in WR and AEC.

- During the first half (H1) of 2021, new goods vehicle registrations grew 40-51% in the WR & AEC, on an annual basis. The national average was 38%.
- Registrations in H1 2021 were 10% above 2019 levels in the WR & AEC. Nationally, registrations were 6% below 2019 levels.

Table 6. New Goods Vehicles Licensed for the First Time.

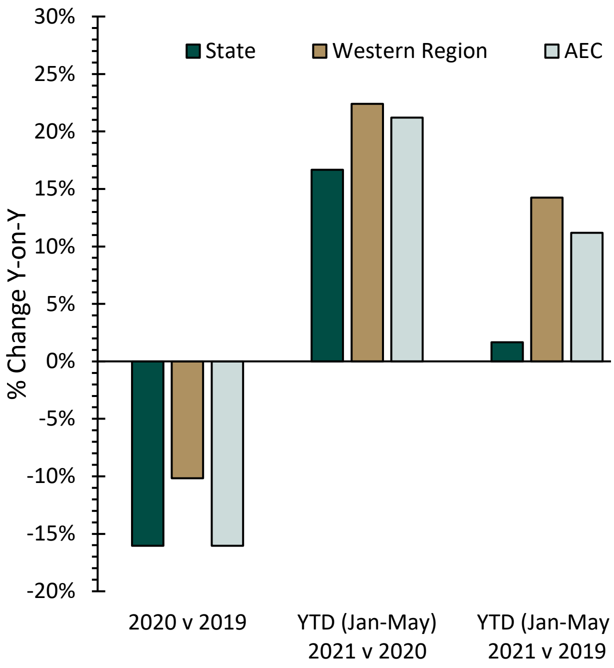
Month	2019 Q1	2020 Q1	2021 Q1	2019 Q2	2020 Q2	2021 Q2	2019 H1	2020 H1	2021 H1
Donegal	149	156	230	110	41	127	259	197	357
Leitrim	36	43	33	23	15	26	59	58	59
Sligo	103	86	94	94	73	33	176	119	161
Galway	276	370	370	230	74	177	512	350	547
Mayo	152	147	181	117	62	126	269	209	307
Clare	119	109	118	91	36	82	210	145	200
Roscommon	86	71	116	63	25	43	149	96	159
Western Region	927	888	1142	707	256	648	1485	1078	1631
Limerick	273	340	327	224	98	169	497	438	496
Kerry	196	234	274	146	74	156	342	308	430
AEC	1396	1462	1743	1077	458	973	2324	1824	2557
State	7931	7345	7859	6374	2427	5617	14305	9772	13476

Source: CS0 (TEM14). Year on year % change in parentheses. See previous TEI reports for previous months.

Housing & Construction

Sales Volumes

Figure 10. Year on Year % change in Sales Volumes



Source: Own Calculations from CSO (HPM03)

Sales Volumes back above pre-pandemic levels.

- Jan-May 2021 has seen a sharp increase in market transactions as excess savings have been channelled into property, particularly in more rural locations.
- Sales volumes from Jan-May 2021 are 11-14% higher in the WR & AEC compared with the same period in 2019. Nationally, volumes were 2% higher.
- While transactions are higher than 2019 levels, the supply of available properties has not kept pace with demand. The lack of supply nationwide has meant that the increase in demand has driven up sales prices and rents, particularly in rural and coastal areas (see accompanying **Insights blog post**).

House Prices

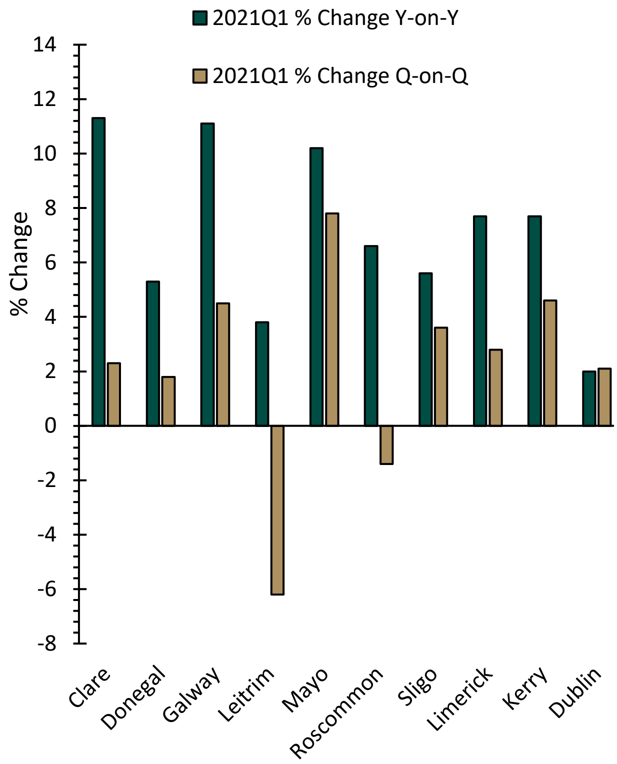
Table 7. Median House Prices based on Market Transactions of all Properties in € Thousands.

Month	Jan 2021	Feb	March	April	May
State	270 (5.8%)	260 (4.0%)	260 (2.0%)	265 (6.0%)	257.5 (8.7%)
Donegal	130 (13.04%)	135 (10.20%)	145 (-2.1%)	129 (20.0%)	128 (19.1%)
Leitrim	105.5 (19.8%)	130 (7.4%)	132.5 (36.6%)	125 (29.6%)	125 (7.8%)
Sligo	122 (-26.1%)	120 (7.4%)	171 (27.6%)	163.3 (21.0%)	165 (40.4%)
Galway City	307.5 (9.0%)	280 (13.6%)	292.5 (8.3%)	300 (17.8%)	287.5 (13.9%)
Galway County	216 (4.1%)	236 (24.2%)	232.9 (-2.0%)	199 (-22.0%)	200 (-20.0%)
Mayo	155 (6.9%)	161 (8.8%)	138 (2.0%)	145 (4.3%)	143 (2.3%)
Roscommon	144 (10.7%)	120 (15.7%)	120 (10.6%)	137.5 (12.7%)	126 (29.9%)
Dublin	395 (9.7%)	392 (3.2%)	405 (8.0%)	395 (9.1%)	395 (7.2%)
Limerick City	155 (0.3%)	185 (28.5%)	176 (-22.6%)	166 (-14.6%)	188 (5.0%)
Limerick County	235 (9.3%)	220 (3.0%)	200 (-0.5%)	215 (4.9%)	225 (7.1%)
Clare	193 (0.8%)	186 (-1.6%)	185 (3.3%)	197.5 (6.7%)	185 (12.1%)
Kerry	195 (16.6%)	177 (-1.7%)	180 (2.9%)	197.5 (17.6%)	195 (2.6%)

Source: CSO (HPM03). Year on Year % change in parentheses. See previous TEI reports for previous months.

Average Rents

Figure 11. 2021Q1 Year on Year % change in Standardised Rents



Source: Residential Tenancies Board Rent Index

Rise in Rents.

- Rents rose annually in all AEC counties during Q1 2021. Increases ranged from 3.8% in Leitrim to 11.3% in Clare.
- Three of the four largest annual increases in the country were in the WR (Clare, Galway, and Mayo).
- Rents fell, compared to the previous quarter, in two WR counties (Leitrim and Roscommon).

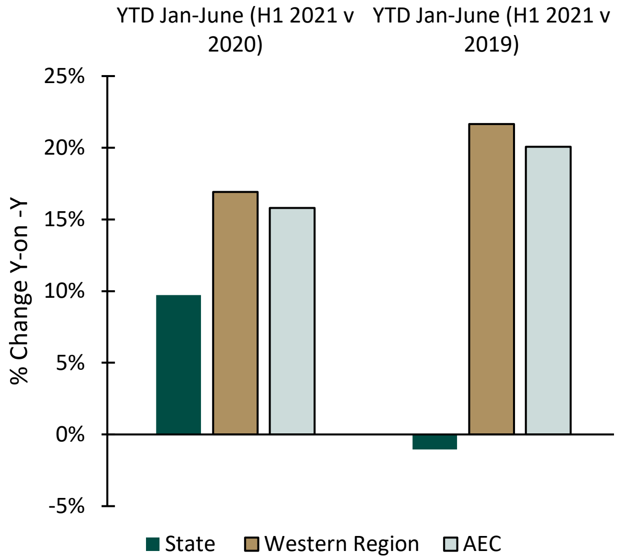
Table 8. Residential Tenancies Board Standardised Rent (Euro).

Month	2020Q1	% Change Y-on-Y	% Change Q-on-Q
Clare	851	11.3	2.3
Donegal	656	5.3	1.8
Galway	1,186	11.1	4.5
Leitrim	595	3.8	-6.2
Mayo	766	10.2	7.8
Roscommon	675	6.6	-1.4
Sligo	808	5.6	3.6
Limerick	1.060	7.7	2.8
Kerry	866	7.7	4.6
Dublin	1,820	2.0	2.1

Source: Residential Tenancies Board Rent Index Reports. Year on Year % change in parentheses.

Dwelling Completions

Figure 12. Year on Year % change in Dwelling Completions



Source: Own Calculations from CS0 (NDQ06)

Dwelling Completions rise in H1 2021

- During H1 2021, total dwelling completions were above pre-pandemic levels in the WR & AEC driven by strong growth in Q2. Nationally, dwelling completions were slightly below pre-pandemic levels.

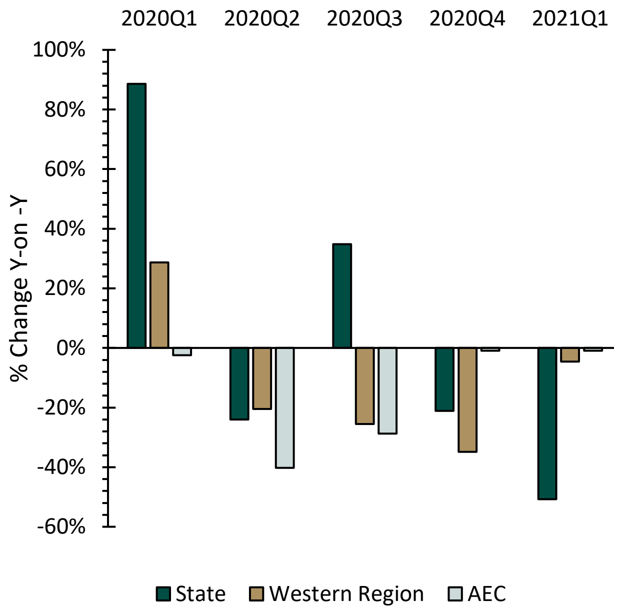
Table 9. Total Dwelling Completions.

	2020Q1	2020Q2	2021Q1	2020Q2
Clare	76 (38%)	76 (-36%)	60 (-21%)	120 (67%)
Donegal	121 (42%)	99 (-11%)	82 (-32%)	122 (24%)
Galway County	192 (32%)	124 (-37%)	204 (6%)	168 (37%)
Galway City	57 (90%)	31 (-21%)	134 (135%)	88 (184%)
Leitrim	5 (-55%)	5 (-55%)	10 (100%)	30 (500%)
Mayo	124 (28%)	53 (-35%)	67 (-45%)	96 (81%)
Roscommon	28 (-28%)	31 (-14%)	60 (114%)	63 (103%)
Sligo	74 (573%)	14 (-67%)	25 (-66%)	29 (107%)
Western Region	677 (43%)	433 (-32%)	642 (-5%)	716 (68%)
Limerick	128 (47%)	64 (-61%)	131 (2%)	150 (134%)
Kerry	83 (4%)	58 (-43%)	116 (40%)	95 (64%)
AEC	888 (39%)	555 (-38%)	889 (0%)	961 (75%)
State	4966 (17%)	3237 (-33%)	3953 (-20%)	5,021 (55%)

Source: Residential Tenancies Board Rent Index Reports. Year on Year % change in parentheses.

Planning Permissions (Units for which Permissions Granted)

Figure 13. Year on Year % change in Planning Permissions



Source: CSO (BHQ12)

Planning permissions down in Q1 2021.

- During Q1 2020, planning permissions (units for which permission granted) fell by 1-5% in the WR and AEC compared with a national decline of 51%.

Table 10. Planning Permissions - Houses (Number).

	2020Q1	2020Q2	2020Q3	2020Q4	2021Q1
Clare	38 (-67%)	64 (-18%)	116 (49%)	176 (2%)	118 (211%)
Donegal	145 (15%)	138 (39%)	285 (20%)	162 (9%)	158 (9%)
Galway County	234 (39%)	50 (-60%)	204 (-39%)	168 (35%)	264 (13%)
Galway City	12 (31%)	25 (56%)	32 (-67%)	5 (-97%)	14 (17%)
Leitrim	15 (200%)	3 (-83%)	25 (92%)	16 (60%)	12 (-20%)
Mayo	101 (4%)	28 (-62%)	95 (-15%)	104 (46%)	75 (-26%)
Roscommon	88 (203%)	4 (-87%)	24 (-31%)	22 (-44%)	40 (-55%)
Sligo	114 (245%)	10 (-47%)	41 (-59%)	33 (14%)	15 (-87%)
Limerick	109 (-49%)	51 (-72%)	93 (-50%)	280 (189%)	114 (5%)
Kerry	82 (-53%)	33 (-66%)	80 (1%)	141 (107%)	75 (-9%)
State	5091 (4%)	3063 (-38%)	5728 (17%)	4432 (-10%)	3039 (-39%)

Source: CSO (BHQ12). Year on Year % change in parentheses. See previous TEI reports for previous months.

Table 11. Planning Permissions One-Off Houses.

	2020Q1	2020Q2	2020Q3	2020Q4	2021Q1
Clare	31 (-53%)	15 (-77%)	63 (21%)	49 (32%)	50 (61%)
Donegal	92 (-1%)	31 (-62%)	124 (9%)	88 (4%)	146 (59%)
Galway County	131 (-9%)	41 (-63%)	153 (22%)	140 (37%)	125 -5%()
Galway City	8 (14%)	2 (-50%)	8 (n/a)	3 (-57%)	12 (50%)
Leitrim	15 (200%)	3 (-73%)	12 (20%)	12 (20%)	10 (-33%)
Mayo	76 (15%)	23 (-68%)	76 (25%)	55 (-13%)	73 (-4%)
Roscommon	19 (-34%)	4 (-87%)	24 (-23%)	22 (5%)	37 (95%)
Sligo	22 (5%)	4 (-60%)	20 (-23%)	20 (-31%)	15 (-32%)
Limerick	74 (10%)	36 (-36%)	59 (-9%)	56 (37%)	76 (3%0
Kerry	50 (-15%)	23 (-57%)	59 -(-23%)	48 (-29%)	69 (38%)
State	1,355 (-7%)	669 (-52%)	1,754 (16%)	1,514 (20%)	1,661 (23%)

Source: CSO (BHQ12). Year on Year % change in parentheses. See previous TEI reports for previous months.

Table 12. Planning Permissions - Multi-Development.

	2020Q1	2020Q2	2020Q3	2020Q4	2021Q1
Clare	7 (-85%)	49 (277%)	53 (104%)	127 (-7%)	68 (871%)
Donegal	53 (61%)	107 (529%)	161 (31%)	74 (17%)	12 (-77%)
Galway County	103 (329%)	9 (-44%)	51 (-76%)	28 (27%)	139 (35%)
Galway City	4 (-88%)	23 (92%)	24 (-76%)	2 (-99%)	2 (-50%)
Leitrim	n/a	n/a	13 (n/a)	4 (n/a)	2 (n/a)
Mayo	25 (-19%)	5 (150%)	19 (-63%)	49 (513%)	2 (-92%)
Roscommon	69 (n/a)	n/a	n/a	n/a	3 (-96%)
Sligo	92 (667%)	6 (-33%)	21 (-72%)	13 (n/a)	n/a (n/a)
Limerick	35 (-76%)	15 (-88%)	34 (-72%)	224 (300%)	38 (9%)
Kerry	32 (-72%)	10 (-78%)	21 (950%)	93 (n/a)	6 (-81%)
State	3,736 (8%)	2,394 (-33%)	3,974 (17%)	2,917 (-20%)	1428 (-62%)

Source: CSO (BHQ12). Year on Year % change in parentheses. See previous TEI reports for previous months.

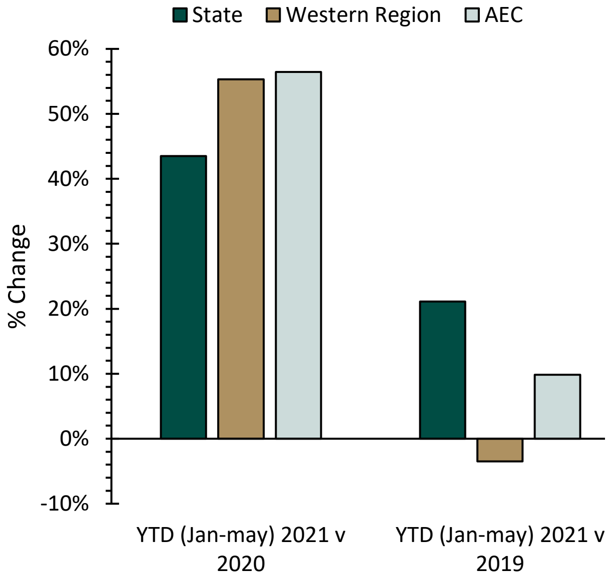
Table 13. Planning Permissions Private Flats/Apartments.

	2020Q1	2020Q2	2020Q3	2020Q4	2021Q1
Clare	3 (-40%)	n/a	12 (-40%)	83 (2667%)	11 (267%)
Donegal	13 (1200%)	21 (163%)	67 (272%)	31 (675%)	3 (-77%)
Galway County	8 (100%)	n/a	49 (-47%)	27 (-45%)	101 (1163%)
Galway City	65 (10%)	80 (82%)	58 (-74%)	2 (-100%)	5 (-92%)
Leitrim	4 (n/a)	2 (n/a)	1 (n/a)	1 (n/a)	10 (-33%)
Mayo	12 (500%)	1 (n/a)	n/a	n/a	16 (33%)
Roscommon	26 (n/a)	n/a	8 (300%)	1 (n/a)	12 (-54%)
Sligo	n/a	n/a	8 (-68%)	1 (-67%)	15 (-32%)
Limerick	12 (-67%)	16 (-74%)	16 (-67%)	204 (1940%)	29 (142%)
Kerry	4 (-71%)	2 (-60%)	10 (-64%)	7 (-13%)	21 (425%0
State	9,041 (249%)	4,208 (-9%)	7,871 (52%)	5,104 (-29%)	3874 (-57%)

Source: CSO (BHQ12). Year on Year % change in parentheses. See previous TEI reports for previous months.

Commencement Notices

Figure 14. Year on Year % change in Commencement Notices (No. of residential units commenced).



Source: The Department of Housing, Local Government and Heritage: BCMS Commencement Notice Data.

Sharp Growth in commencement notices for residential units during 2021.

- From Jan-May 2021, there was a rise in residential units commenced of 55-56% in the WR and AEC compared with the same period in 2020. Nationally, there was growth of 44%.
- The number of units commenced is above pre-pandemic levels (Jan.-May 2019) in the AEC and nationally. WR units commenced were 4% lower than 2019.

Table 14. Commencement Notices (No. of residential units commenced).

	YTD (Jan.-May) 2019	YTD (Jan.-May) 2020	YTD (Jan. -May) 2021
Clare	196	122	140
Donegal	188	103	186
Galway County	320	217	340
Galway City	205	70	251
Leitrim	6	23	17
Mayo	247	106	155
Roscommon	57	65	58
Sligo	35	73	63
Limerick	227	266	435
Kerry	214	145	217
State	10385	8765	12580

Source: The Department of Housing, Local Government and Heritage: BCMS Commencement Notice Data. See previous TEI reports for previous months.

Read the WDC Policy Team's Insights Blog and sign up to our mailing list at https://westerndevelopment.ie/insights/

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