

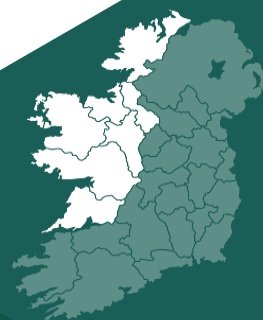
Preliminary Results Census 2022:

Analysis of results for the Western Region.



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



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Executive Summary

Geographic Change

- The population of the Western Region was estimated at 882,323 in 2022, up 6.5% from 2016. Two Western Region counties (Leitrim & Roscommon) recorded population growth rates above the national average.
- In 2022, the Irish state had an estimated total population 178% higher than in 1926. The 2022 Western Region population was 110% higher than in 1926. Within the region, Galway, Clare, and Donegal had higher populations in 2022 than in 1926.
- The National Planning Framework (NPF) shapes long-term economic and spatial development and associated infrastructure investment. The preliminary estimates suggest Leitrim has already hit its 2026 NPF population projection. Clare and Roscommon were above projections, Sligo was on track, and Galway, Mayo, and Donegal below the projection.
- Population growth outpacing NPF projections raises questions about the levels of infrastructure to support such growth. For counties with slower than expected growth, hitting housing and broader employment targets takes on even greater importance.
- At the sub-county level, the historical experience has been a consistent decline in rural populations, particularly within more remote areas. This overall trend has continued. However, some urban areas have experienced population loss and some rural areas have experienced consistent population growth. These trends suggest that not all “rural” or “urban” areas are the same. Public policy formation should be place-based at an appropriate spatial scale, particularly concerning peripheral and rural areas, which can be diverse in needs.
- The NPF also targets the regional distribution of population growth. A key target up to 2040 is for population and employment growth in the Eastern & Midland region to be matched by the combined Southern and Northern & Western Regions. The preliminary evidence, albeit over the shorter-term, tentatively suggests a continued dominance of population and employment growth in the Eastern & Midland region.
- A continuation of concentrated growth in the Eastern & Midland region combined with accelerated population growth estimates should give pause to consider the implications in terms of the NPF. There is a need to ensure the adequate development and funding of regional public services and infrastructure and broader supports to reach the stated regional employment and population targets. The WDC argues that future policy must reduce regional infrastructure deficits to enhance regional connectivity and accessibility and provide broader support for regional innovation and the ‘3Es’ of Enterprise, Employment, and Education to promote regional development.

Components of Population Change

- The preliminary results show a reversal of the 2011-16 trend of negative net migration across the Western Region. Net inward migration was not only positive but outweighed the natural increase in Clare, Leitrim, Mayo, Roscommon, and Sligo.
- Of the Western Region counties, only Galway had an annual rate of natural increase above the national average. Six of the eight lowest annual rates of natural increase in the country were recorded in Western Region counties.
- Low rates of natural increase likely reflect differences in age structures. For example, the Western Region counties generally hold higher old-age and youth dependency ratios. Higher dependency ratios constrain future growth prospects as there are fewer “economically active” persons to support the “economically inactive” population.
- High dependency ratios in the Western Region are related to historical structural issues such as the outward migration of the region’s working-age population. Graduate retention and a focus on regional employment provision and diversification are key elements to reduce dependency ratios and should form key components of regional development policies.

Housing

- The housing stock in all Western Region counties grew and combined reached 399,785 in 2022 up 4.2% from 2016-22. Population growth from 2016-22 was relatively concentrated in Leinster and these trends were largely mirrored in the growth of the housing stock. Western Region counties recorded the lowest housing stock increases in the state and all seven counties recorded growth below the national average.
- Vacancy rates across the Western Region were higher than the national average in 2022, in line with historical patterns. However, the region also recorded the largest declines in vacancy rates from 2016-22.
- An analysis over the longer term reveals that the comparatively low increase in the Western Region’s housing stock from 2016-22 may be viewed, at least somewhat, as a correction from strong comparative regional housing stock growth. Large declines in vacancy combined with the historically strong housing stock growth suggest there may have been comparatively greater capacity in the Western Region to accommodate population growth. These factors may help to explain the comparatively low regional housing stock growth from 2016-22.
- In recent years, there has been a sharp shortage of regional housing as this comparative capacity has been absorbed, with regional housing demand rising sharply. These factors may help to explain the sharp increase in regional house prices over the pandemic period and highlight the need to increase regional housing supply into the future.

1. Introduction

In April 2022, the Central Statistics Office of Ireland (CSO) conducted a Census of Population. The full results of Census 2022 will be published throughout 2023 within a series of detailed thematic, demographic and socio-economic reports e.g., age, education, housing, and economic status.

In June of this year, the CSO published preliminary results of the Census across a limited set of areas based on initial counts from more than 5,000 enumeration areas. The preliminary results will be subject to revision when the full results are published next year. It is nevertheless important to examine the preliminary results as they can be used to provide key regional insights.

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

The areas examined within this report are:

- Geographical Population Change
- Components of Population Change
- Housing

All data, unless stated otherwise, was accessed from the CSO's [PXStat](#) service, the main CSO data dissemination service.



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2. Geographic Changes in Population

2.1 Population Change in the Western Region 2016-22

The preliminary results show an estimated 2022 national population of 5,123,536. This is the highest population recorded since the 1841 Census. The seven-county Western Region's population was estimated to be 888,323 in 2022. The region's estimated population growth rate from 2016-22, at 6.5%, was below national growth of 7.6% (Table 1). Consequently, the Western Region's share of the total national population fell slightly from 17.4% in 2016 to 17.2% in 2022.

All Western Regions counties recorded growth from 2016-22, reversing the trend from 2011-16 when two Western Region counties (Mayo & Donegal) recorded population declines.¹ Two Western Region counties recorded population growth rates above the national average (Leitrim 9.5% and Roscommon 8.4%). The lowest population growth recorded in the country was in Donegal at 4.5%. The large growth in Roscommon lead to the county overtaking Sligo in terms of its total population.

Table 1 Overview of Population and Population Changes in the Western Region 2016-22.

	2016	2022 (preliminary)	Actual Change	% Change
Co. Clare	118,817	127,419	+8,602	7.2%
Co. Donegal	159,192	166,321	+7,129	4.5%
Co. Galway	258,058	276,451	+18,393	7.1%
Co. Leitrim	32,044	35,087	+3,043	9.5%
Co. Mayo	130,507	137,231	+6,724	5.2%
Co. Roscommon	64,544	69,995	+5,451	8.4%
Co. Sligo	65,535	69,819	+4,284	6.5%
Western Region	828,697 <i>17.4% of State</i>	882,323 <i>17.2% of State</i>	+53,626	6.5%
State	4,761,865	5,123,536	+361,671	7.6%
State Ex. Dublin	3,414,506	3,672,835	+258,329	7.6%

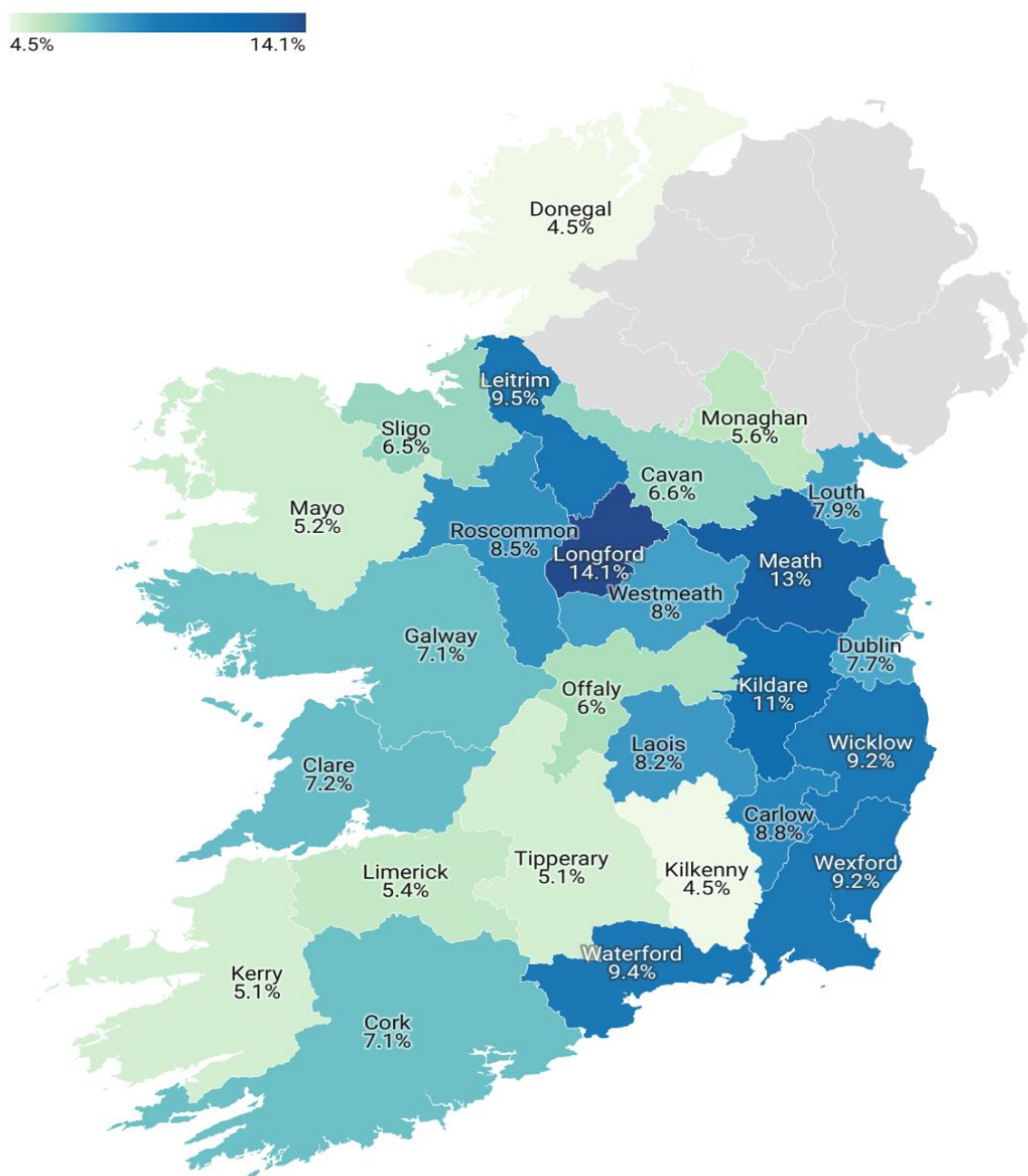
Source: WDC Analysis of CSO data.

¹ There is some confusion regarding a population decline recorded in Sligo from 2011-16. The decline was recorded only in the provisional data, the revisions showed a slight rise of 0.2%.

2.2 Population Change in the context of the National Planning Framework

Figure 1 maps the population changes for each county in the State from 2016-22. The population in every county increased. Counties in Leinster recorded the highest population growth rates. Ten of the twelve counties in the province recorded population growth above the national average. Longford grew by more than 14%, with Meath, Kildare, and Fingal, also growing strongly².

Figure 1 Map of Changes in Population by County 2016-22.



Source: CSO Ireland • Created with Datawrapper

² As noted by Kilgariff (2022) 46% of the population growth recorded in Longford occurred in an electoral division that contains a large holiday resort. The Census records the location where persons spent the night not where they usually reside and thus this helps to explain some of the largest increase.

The National Planning Framework (NPF) seeks to shape longer-term planning, economic and spatial development, and the associated infrastructure investment at national, regional, and local levels. The implementation roadmap for the NPF contains transitional population projections at the local authority level.³ These projections form the basis of the Housing Need Demand Assessment (HNDA) for each local authority.

Table 2 compares the NPF population projections for the year 2026 with the 2022 estimated population in each Western Region county. Leitrim is estimated to have already reached its 2026 projection, this may be due to a combination of high unexpected levels of net migration (see section 3) as well as a comparatively large level of new dwelling completions relative to housing demand (McGrath, 2022) and a sharp reduction in vacancy rates (see section 4). Clare and Roscommon were above the NPF projections and Sligo was on track. In contrast, Galway, Mayo, and Donegal were below the 2026 projection.

Where counties are growing at faster rates than the NPF projections questions around the level of public service provision and infrastructure to support such levels of population growth are raised. For areas growing slower than anticipated, the achievement of housing targets, as well as employment targets, takes on even greater importance.

Table 2 Overview of Population and Population Changes in the Western Region 2016-22

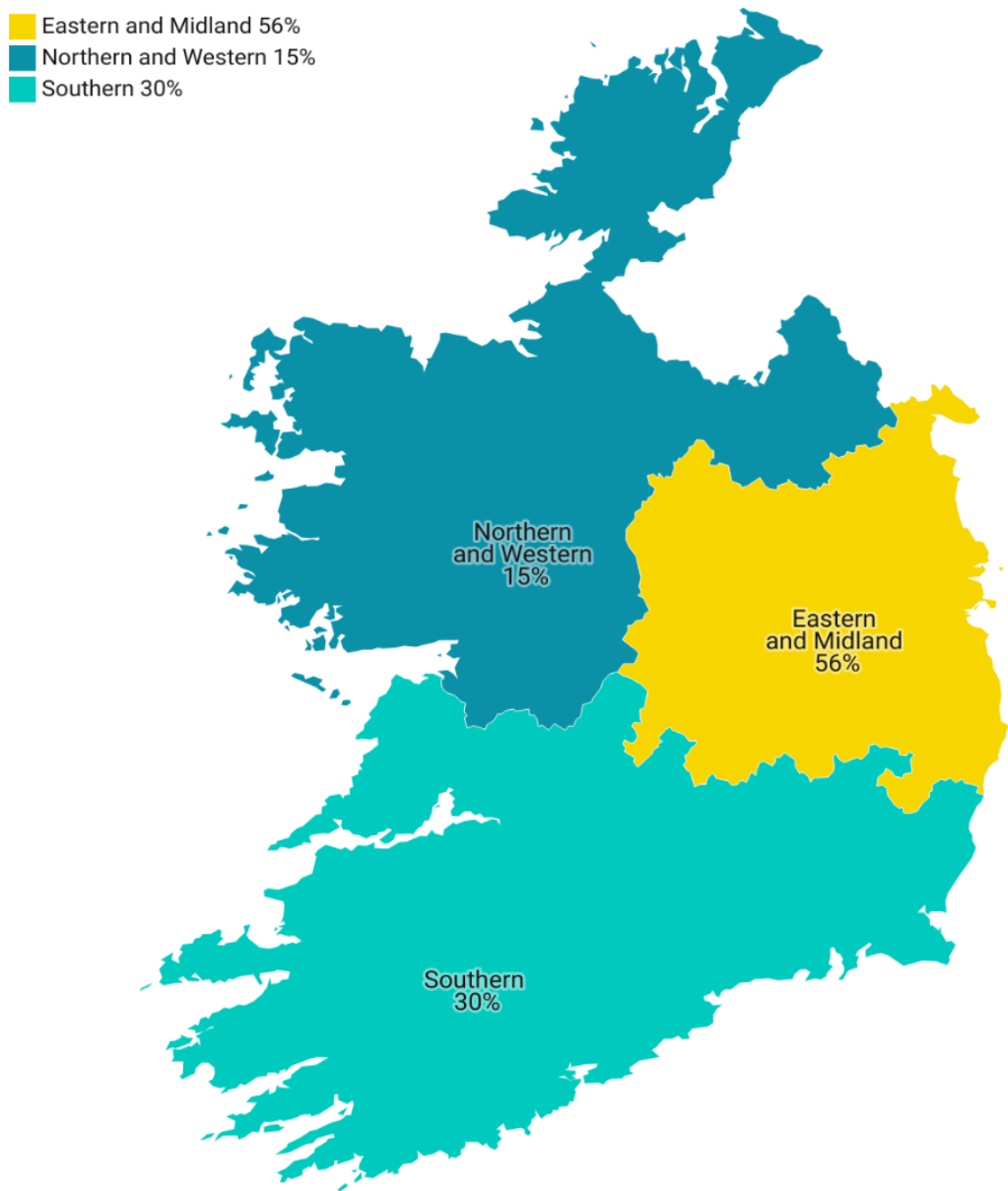
	2022 Population (Preliminary)	NPF 2026 Projection	Estimated Year for 2026 projection
Clare	127,419	129,500	2024
Donegal	166,321	173,500	2028
Galway	276,451	300,000	2030
Leitrim	35,087	35,000	2022
Mayo	130,507	137,231	2026
Roscommon	69,995	70,500	2023
Sligo	69,819	71,500	2025
Western Region	882,323	922,000	2027
State	5,123,536	5,289,500	2025
State Ex. Dublin	3,672,835	3,800,500	2025

*** The estimated year is based on the *level* of population growth between 2016-22 continuing. For example, 8,938 persons per year from 2016-2022 were added to the Western Regions population. 8,938 was then added for each subsequent year to project the Western Region's population.

³ <https://npf.ie/wp-content/uploads/NPF-Implementation-Roadmap.pdf>

The regional distribution of population growth is also important in terms of the national policy objectives outlined in the NPF. National policy objective 1a targets population and employment growth across the NUTS 2 regions.⁴ A key target is for growth in the Eastern & Midland region to be matched by the combined Southern and Northern & Western Regions up to 2040. During the 2016-22 period, the Eastern & Midland region is estimated to have accounted for 56% of total population growth and thus population growth in the combined Northern & Western and Southern regions did not match the Eastern & Midland region (Figure 2).

Figure 2 Share of Total Population Growth by Region 2016-22.

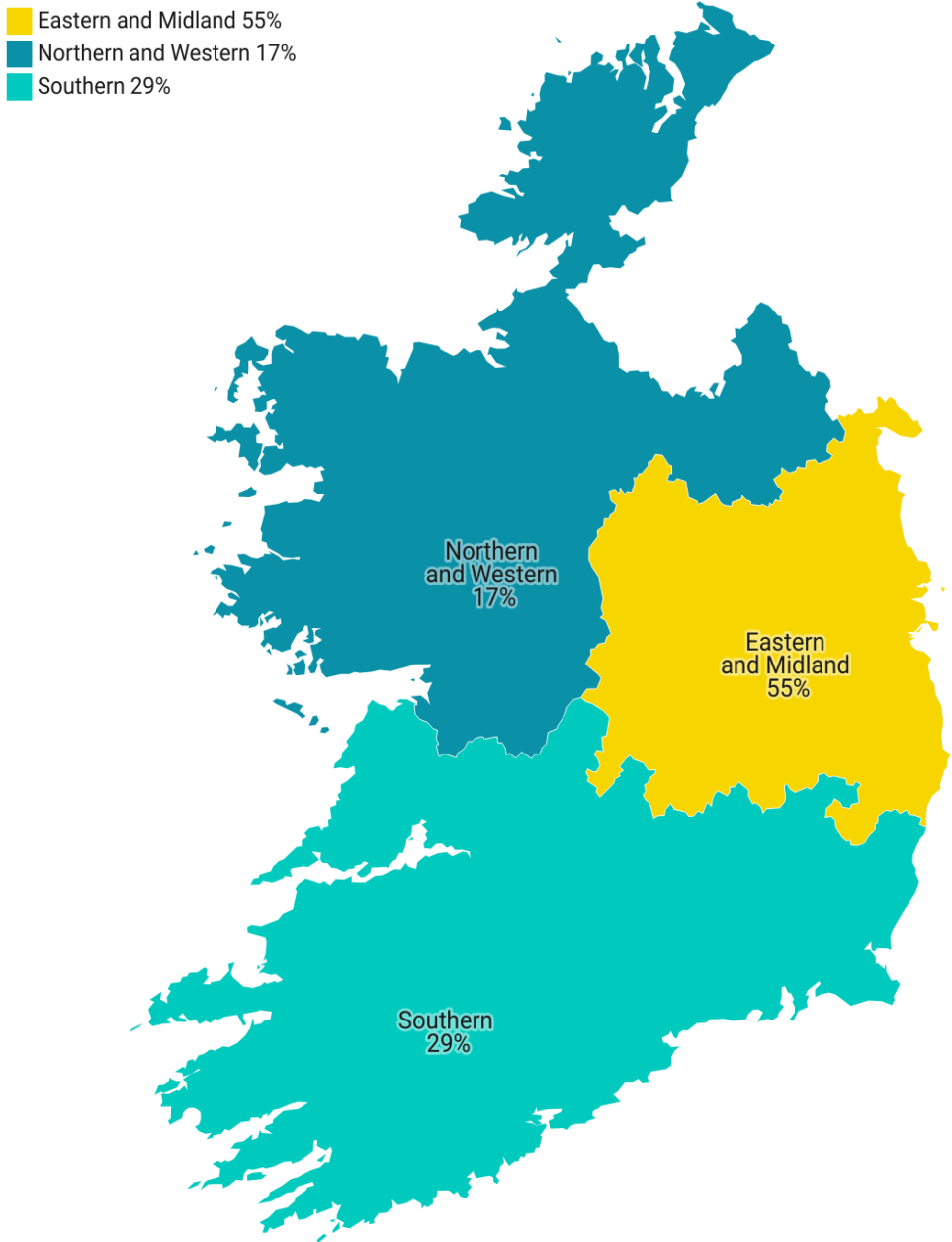


NOTE: Total does not = 100% due to rounding
Source: WDC Analysis of CSO data • Created with Datawrapper

⁴ The Nomenclature of Territorial Units for Statistics (NUTS) were created by Eurostat to define territorial units to produce regional statistics across the European Union.

An insight into the regional distribution of employment growth can be obtained from the quarterly CSO Labour Force Survey (LFS) series. Figure 3 illustrates that the regional distribution of employment growth appears to mirror the distribution of population growth. The Eastern & Midland region accounted for 55% of the total national employment growth from Q1 2016 to Q1 2022, according to the LFS series, again outweighing the combined share of the Southern and Northern & Western regions.

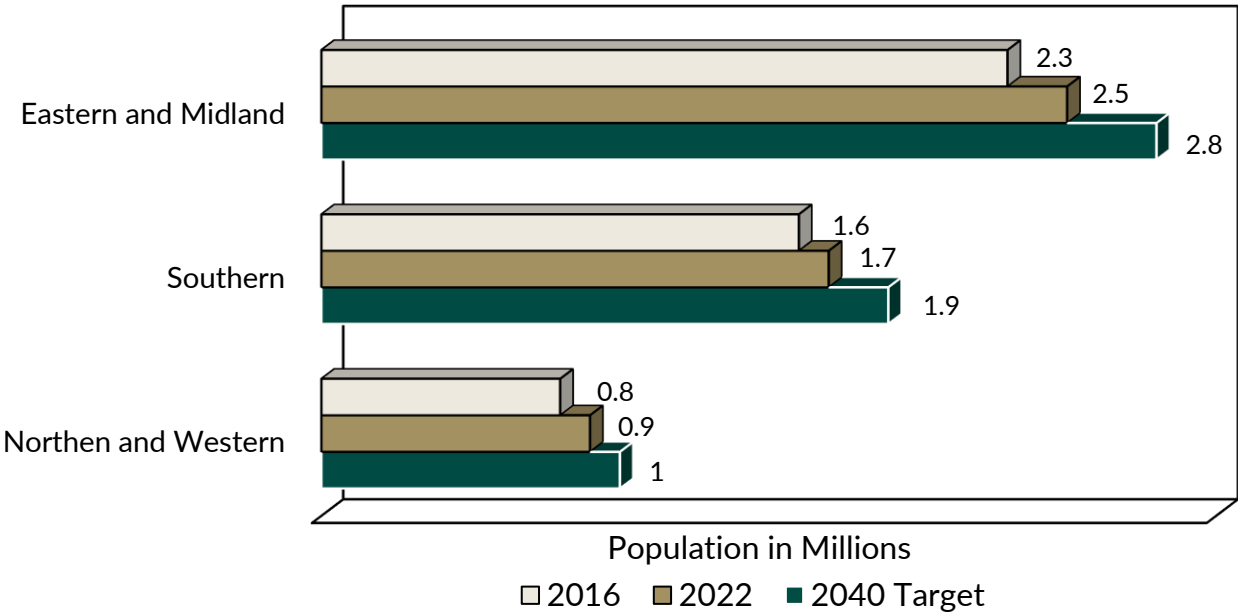
Figure 3 Share of Total Employment Growth (LFS data) by Region 2016-22



NOTE: Total does not = 100% due to rounding
Source: WDC Analysis of CSO data • Created with Datawrapper

National policy objective 1b sets specific total population targets in 2040 for each of the regions. Figure 4 illustrates the progress towards these 2040 targets. If the current levels of population growth continued at the same pace suggested by the preliminary estimates, then the Eastern & Midland Region would hit its 2040 target by 2030, the Northern & Western Region by 2033 and the Southern region by 2035.⁵

Figure 4 Progress Towards 2040 Population Targets by Region.



Source: WDC Analysis of CSO data.

It should be noted that the results above are preliminary and that the national policy objectives are longer rather than shorter-term goals. However, the analysis does, at least tentatively, suggest a continued dominance in the Eastern & Midland region. Continued dominance combined with faster than projected population growth should give pause to consider the potential implications in terms of the NPF. There is a need to ensure the adequate development and funding of regional public services and infrastructure and broader supports to reach regional employment and population targets. The WDC has identified key regional issues in the context of the NPF in [WDC Policy Briefing No 8](#).

"future policy must address the reduction of regional infrastructure deficits and broader support for the '3Es' of enterprise, employment, and education to enable regions to make the most of their assets. Given low levels of historical investment, there is a clear need to improve regional connectivity and accessibility. A constraint for regional entrepreneurs is the lack of physical and digital infrastructure. The NDP must expedite the roll-out of high-speed broadband as well as the development and leverage physical infrastructure and investment to enhance regional connectivity and accessibility" (McGrath, Frost & McHenry, 2021).

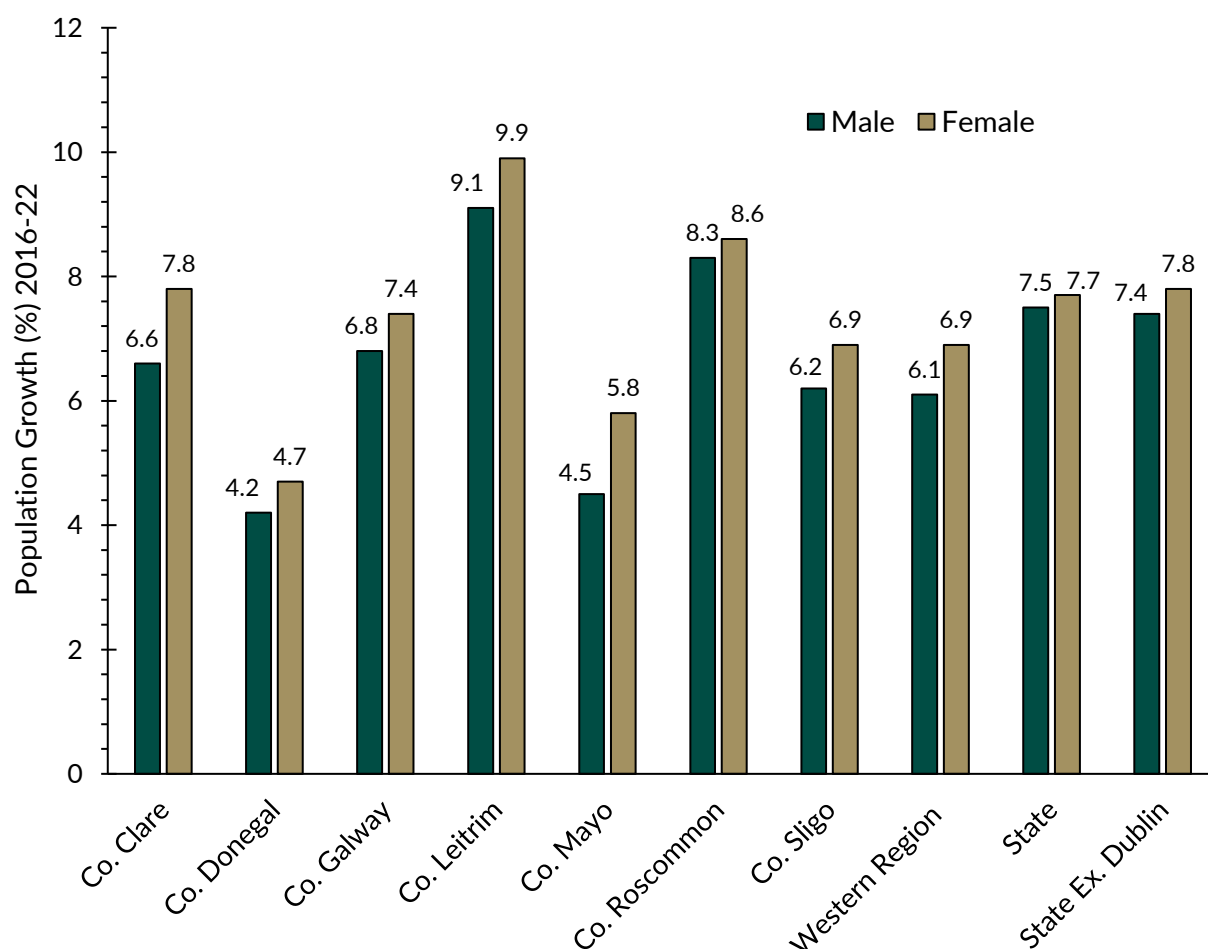
⁵ If the population growth rate from 2016-22, rather than the level, is used population would grow even faster, due to compounding. It should be noted that the 2040 targets assume population growth slows up to 2040.

2.3 Population Changes by Sex

Figure 5 shows the difference in population growth rates from 2016-22 for males and females across the Western Region and the State. The disparity between the growth in the female and male populations was more pronounced in the Western Region. The region combined saw an increase of 6.9% in the female population compared to a 6.1% rise for males, a 0.8 percentage point gap. Nationally, there was a 7.7% rise in the female population compared with a 7.5% rise in the male population, a 0.2 percentage point gap. There was a particularly large disparity in growth rates, by sex, in Mayo (males 4.5% v females 5.8%) and Clare (males 6.6% v females 7.8%).

The pattern of considerable female population growth in the Western Region represents a continuation of the Census 2016 trend. From 2011-16 some counties even saw male populations decline, while female populations rose (Leitrim, Mayo, and Sligo). Only Donegal recorded a decline in both male and female populations from 2011-16. While the pattern of higher relative female population growth was a national trend, there were some counties where higher growth for males than females was recorded from 2016-22 (Dublin, Meath, Monaghan, and Offaly).

Figure 5 Population Growth by Sex 2016-22

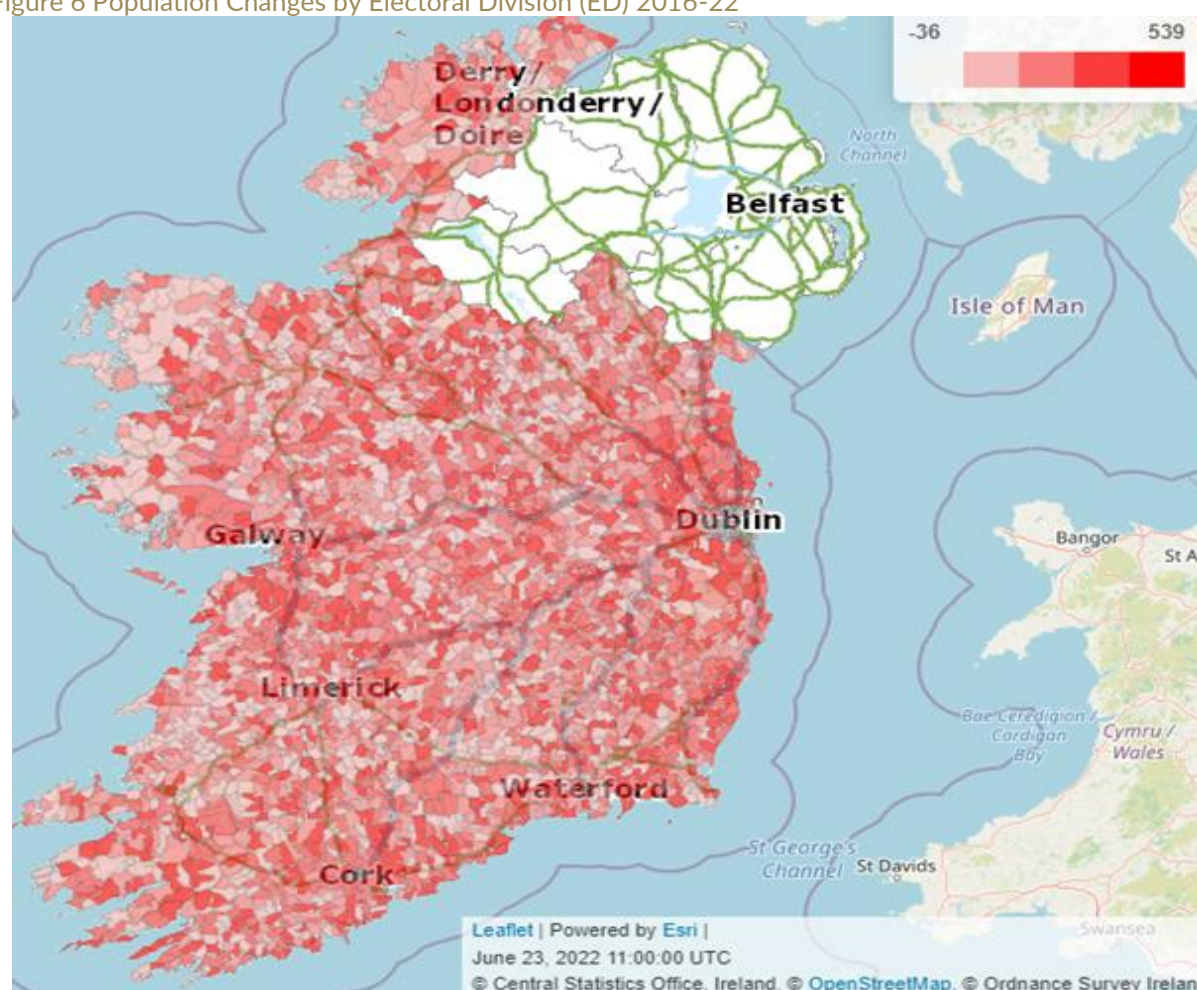


Source: WDC Analysis of CSO data.

2.4 Sub-County Population Changes

Figure 6 illustrates population changes at the Electoral Division (ED) level nationwide. Of the 3,409 EDs in the State, where data was provided⁶, 2,832 (83%) recorded a population increase or no change from 2016-22 and 577 (17%) showed a population decline. Of the 950 EDs in the Western Region, where data was available, 761 (80%) showed population increases or no change and 189 (20%) experienced population declines.

Figure 6 Population Changes by Electoral Division (ED) 2016-22



Source: Map created through CSO PXstat database.

Table 3 shows that the EDs within the Western Region generally had lower growth rates at the ED level than the national average as well as a higher proportion of EDs with negative population growth from 2016-22. Table 3 also details the top 10 fastest-growing EDs and slowest-growing (i.e., largest population declines) in the country. Nine of the fastest-growing EDs were in Leinster, reflective of the county-level trends noted above. Within the Western Region, Cappaghbaun and Carrowbaun in Clare experienced the 14th and 15th highest growth rates in the Country. Leitir Breacáin and Galway Rural (Part Rural) in Galway recorded the 18th and 21st highest growth rates, respectively.

⁶ There are 3,440 ED's in the State, some individual EDs are grouped together by the CSO in the data release.

Table 2 Population Changes at Electoral Division Level: State

Number of EDs		Avg. ED level Growth Rate	EDs with Negative Growth
Western Region	950	6.0	189 (20%)
State	3,409	6.8	577 (17%)
Electoral Division (ED)	Population 2022	Actual Change	% Change
<i>State: Top 10 Highest Population Growth Rates</i>			
Forgney (Longford)	3,136	2,645	539
Kilbarry (Waterford)	2,721	1,580	139
Merchants Quay E (Dublin)	5,867	3,378	136
Dún Laoghaire-Glenageary (Dublin)	4,505	2,576	133.5
Rotunda B (Dublin)	4,401	1,943	79
Balgriffin (Dublin)	5,536	2,423	78
Rodanstown (Meath)	1,874	751	67
Killashee (Kildare)	433	168	63
Lucan-St. Helen's (Dublin)	16,656	5,998	56
Killiskey (Wicklow)	1,625	563	53
<i>State: Bottom 10 Population Growth Rates</i>			
Croom (Limerick)	1,437	-255	-15
Mallardstown (Kilkenny)	213	-39	-15.5
North City (Dublin)	4,777	-877	-15.5
Swanlinbar (Cavan)	311	-64	-17
An Ros (Galway)	76	-17	-18
Custom House (Limerick)	591	-145	-20
Ballyegan (Kerry)	92	-23	-20
Templecarn (Donegal)	96	-27	-22
Mansion House B (Dublin)	936	-375	-29
Garvagh / Arigna (Leitrim)	116	-64	-36

Source WDC Analysis of CSO data.

O'Driscoll et al. (2022a; 2022b) take a historical look at ED population changes from 1986 to 2022 and found that consistent population loss since 1986 has been predominately concentrated in the more rural and peripheral areas in the west and midlands. Population loss from 2016-22 was found to have followed these historical patterns although population loss was less common and less intense than in previous intercensal periods. O'Driscoll et al. note that urban areas, too, have experienced population loss, demonstrating that population losses are not a simple rural or peripheral phenomenon. There was also evidence of rural areas with consistent population growth, especially in areas surrounding cities. Consequently, a broad categorisation of “rural” or “urban” will fail to capture these and other spatial nuances in terms of population change. A key spatial nuance of population losses noted by O'Driscoll et al. was that of “clustering” where those areas experiencing persistent declines are generally clustered together. This type of clustering indicates that spatially targeted supports could be effective and may have spillover impacts to aid these areas.

A general policy lesson to be taken is that public policy formation should consider an appropriate spatial scale, particularly in relation to peripheral and rural areas, which as indicated above, can be diverse in needs. O'Driscoll et al. argue that an inadequate spatial scale and an absence of place-specific targets in overarching policy documents for rural development such as Project Ireland 2040 and Our Rural Future risk spreading available resources too thinly. Better data at lower spatial scales would be welcome, not just in relation to population changes but also for public services, mobility, infrastructure and living standards, more generally. The WDC is actively pursuing research concerning better regional economic and social data. The WDC Policy Analysis Team currently publishes a quarterly regional based Timely Economic Indicators report and commentary and is currently developing Sustainable Regional Development Indicators and Regional Mobility Indicators.

Tables 4-10 provide a more detailed breakdown of the population changes at the ED level in each Western Region County. In general, the EDs in the Western region had lower population growth rates than the national average and higher shares of EDs with population declines. Galway was an outlier in the Western Region as the county held both a larger average growth rate and a smaller share of EDs with population declines compared with the national average. Roscommon had a lower share of EDs with population declines but lower average growth rates than the national average. Clare and Leitrim had higher average growth rates but higher shares of EDs with population declines than the national average. Mayo, Donegal, and Sligo all had lower growth rates and higher shares of EDs with population declines than the national average.

Table 3 Population Change in Clare Electoral Divisions.

	Number of EDs	Avg. Population Growth Rate	EDs with Negative Growth
Co. Clare EDs	151	7.6	31 (21%)
Electoral Division (ED)	Population 2022	Actual Change	% Change
<i>Top 10 Highest Population Growth Rates</i>			
Cappaghbaun	219	69	46
Carrowbaun	169	53	45.7
Liscannor	475	122	34.6
Kilkee	1,214	297	32.4
Lisdoonvarna	1,254	303	31.9
Drumcreehy	554	131	31
Cappavilla	1,106	260	30.7
Feakle	454	103	29.3
Kinturk	317	69	27.8
Muckanagh	372	72	24
<i>Bottom 10 Population Growth Rates</i>			
Cloghaun	190	-12	-5.9
Cratloe	1,423	-91	-6
Einagh	303	-21	-6.5
Knock	227	-16	-6.6
Knocknagore	199	-17	-7.9
Ballynahinch	234	-27	-10.3
Tullig	98	-12	-10.9
Killimer	422	-58	-12.1
Ballycannan	1,023	-143	-12.3
Moveen	75	-12	-13.8

Source: WDC Analysis of CSO data.

Table 4 Population Change in Donegal Electoral Divisions.

	Number of EDs	Avg. Population Growth Rate	EDs with Negative Growth
Co. Donegal EDs	149	4.5	33 (22%)
Electoral Division (ED)	Population 2022	Actual Change	% Change
<i>Top 10 Highest Population Growth Rates</i>			
Bundoran Urban	2,120	402	23.4
Loch Iascaigh	355	66	22.8
Grianfort	365	66	22.1
Maol Mosóg	259	45	21
Caisleán na dTuath	271	44	19.4
Tieveskeelta	143	23	19.2
Bundoran Rural	1,176	179	18
Ballymacool	2,723	391	16.8
Letterkenny Urban	2,541	342	15.6
Críoch na Sméar	320	43	15.5
<i>Bottom 10 Population Growth Rates</i>			
Buncrana Urban	3,271	-125	-3.7
Goland	357	-15	-4
An Leargaidh Mhór	533	-24	-4.3
Cloghard	621	-32	-4.9
Maas	271	-16	-5.6
Ardmalin	667	-53	-7.4
Inis Caoil	81	-9	-10
An Dúchoraidh	78	-10	-11.4
Inch Island	393	-68	-14.8
Templecarn	96	-27	-22

Source: WDC Analysis of CSO data.

Table 5 Population Change in Galway Electoral Divisions.

	Number of EDs	Avg. Population Growth Rate	EDs with Negative Growth
Co. Galway EDs	236	6.9	33 (14%)
Electoral Division (ED)	Population 2022	Actual Change	% Change
<i>Top 10 Highest Population Growth Rates</i>			
Leitir Breacáin	315	95	43.2
Galway Rural (Part Rural)	212	63	42.3
Raford	659	173	35.6
Paróiste San Nicoláis	3,112	718	30
Kilconierin	728	145	24.9
Mervue	2276	445	24.3
Levally	439	85	24
Cappard	122	23	23.2
An Spidéal	1773	330	22.9
Doonloughan	99	17	20.7
<i>Bottom 10 Population Growth Rates</i>			
Kilquain	292	-14	-4.6
Clifden	2,051	-108	-5
Ballymoe	393	-21	-5.1
Boyouanagh	239	-14	-5.5
Maíros	334	-20	-5.6
Binn an Choire	211	-15	-6.6
Carrownagur	399	-42	-9.5
An Chorr	153	-19	-11
Rockbarton	1,825	-272	-13
An Ros	76	-17	-18.3

Source: WDC Analysis of CSO data.

Table 6 Population Change in Leitrim Electoral Divisions.

	Number of EDs	Avg. Population Growth Rate	EDs with Negative Growth
Co. Leitrim EDs	73	7.7	15 (21%)
Electoral Division (ED)	Population 2022	Actual Change	% Change
<i>Top 10 Population Growth Rates</i>			
Roosky	821	205	33.3
Belhavel	310	71	29.7
Rinn	459	89	24.1
Keshcarrigan	605	116	23.7
Kiltyclogher	254	47	22.7
Newtowngore	297	55	22.7
Kiltubbrid	185	32	20.9
Corriga	170	28	19.7
Glenfarn	158	26	19.7
Ballinamore	1299	192	17.3
<i>Bottom 10 Population Growth Rates</i>			
Killygar	124	-2	-1.6
Moher	217	-4	-1.8
Ballaghameehan	189	-6	-3.1
Glenboy	231	-8	-3.3
Cloverhill	325	-20	-5.8
Killarga	65	-4	-5.8
Glenade	158	-14	-8.1
Cloonclare	153	-25	-14
Castlefore	223	-37	-14.2
Garvagh / Arigna	116	-64	-35.6

Source: WDC Analysis of CSO data.

Table 7 Population Change in Mayo Electoral Divisions.

	Number of EDs	Avg. Population Growth Rate	EDs with Negative Growth
Co. Mayo EDs	152	6.3	40 (26%)
Electoral Division (ED)	Population 2022	Actual Change	% Change
<i>Top 10 Population Growth Rates</i>			
Burren	378	66	21.2
Croaghpatrick	690	112	19.4
Derry	208	33	18.9
Srahmore	167	25	17.6
Rathoma	253	36	16.6
Louisburgh	1106	148	15.4
Slievemahanagh	521	67	14.8
Attymass West	270	34	14.4
Ballyhaunis	3495	438	14.3
Baile Óbha	235	29	14.1
<i>Bottom 10 Population Growth Rates</i>			
Dumha Éige	589	-34	-5.5
Ballycastle	580	-35	-5.7
Tumgesh	344	-22	-6
Owennadornaun / Bundorragha	169	-11	-6.1
Ballycroy North	284	-19	-6.3
Clare Island	192	-18	-8.6
An Geata Mór Theas	884	-96	-9.8
Bunaveela	73	-8	-9.9
Letterbrick	112	-13	-10.4
Erriff	104	-18	-14.8

Source: WDC Analysis of CSO data.

Table 8 Population Change in Roscommon Electoral Divisions.

	Number of EDs	Avg. Population Growth Rate	EDs with Negative Growth
Co. Roscommon EDs	110	6.7	17 (15%)
Electoral Division (ED)	Population 2022	Actual Change	% Change
<i>Top 10 Highest Population Growth Rates</i>			
Rosmoylan	216	52	31.7
Oakport	520	107	25.9
Termonbarry	963	185	23.8
Kilbryan	398	73	22.5
Ballyfarnan	279	45	19.2
Strokestown	1232	196	18.9
Ogulla	403	63	18.5
Ballaghaderreen	3229	503	18.5
Roscommon Urban	2001	278	16.1
Estersnow	101	14	16.1
<i>Bottom 10 Population Growth Rates</i>			
Dunamon	324	-8	-2.4
Aghafin	138	-4	-2.8
Kilbride South	374	-14	-3.6
Lisgarve / Mantua	217	-9	-4
Cloonyquin	253	-11	-4.2
Castleteheen	321	-14	-4.2
Cloonygormican	433	-22	-4.8
Creeve	153	-9	-5.6
Rossmore	158	-10	-6
Carrowduff	205	-27	-11.6

Source: WDC Analysis of CSO data.

Table 9 Population Change in Sligo Electoral Divisions.

	Number of EDs	Avg. Population Growth Rate	EDs with Negative Growth
Co. Sligo EDs	79	4.6	20 (25%)
Electoral Division (ED)	Population 2022	Actual Change	% Change
<i>Top 10 Highest Population Growth Rates</i>			
Templeboy South / Mullagheruse	264	53	25.1
Dromore	576	107	22.8
Lakeview	510	78	18.1
Ballynashee	390	59	17.8
Coolaney	1,560	229	17.2
Sligo North	6024	802	15.4
Collooney	3,161	419	15.3
Temple	396	47	13.5
Collooney	3161	419	15.3
Ballysadare East	1396	159	12.9
<i>Bottom 10 Population Growth Rates</i>			
Breencorragh	110	-4	-3.5
Drumcolumb	279	-14	-4.8
Branchfield / Carrownaskeagh	154	-8	-4.9
Cloonoghill	303	-17	-5.3
Sligo East	4705	-293	-5.9
Aclare	240	-17	-6.6
Cartron	157	-16	-9.2
Bricklieve	213	-22	-9.4
Buncrowey	247	-39	-13.6
Owenmore	101	-17	-14.4

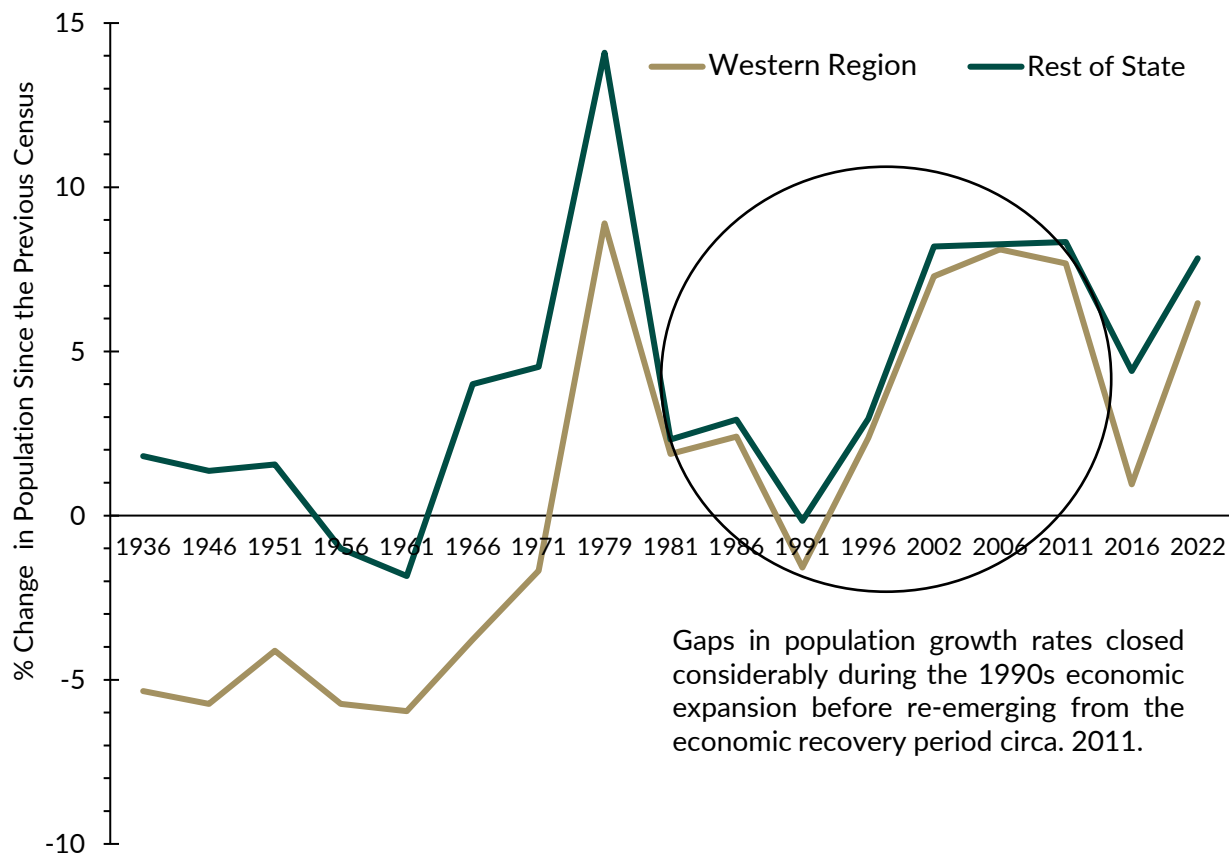
Source: WDC Analysis of CSO data.

2.5 Historical Changes in the Western Region's Population

Figure 7 illustrates population growth rates in the Western Region for each intercensal period from 1936. The preliminary 2022 estimates show a population increase in each Western Region county (see section 2.1). This represents a reversal from the 2016 Census which showed a population decline in Donegal and Mayo from 2011-16. Those population declines in 2016 represented a striking change from the persistent population growth recorded during the rapid economic expansion period during the 1990s. From 1991-96 the Western Region's population grew 2.4%; 7.3% from 1996-2002; 8.1% from 2002-06 and 7.7% from 2006-11.

Over the longer term, the Western Region has experienced considerably lower rates of population change than the rest of the state. The gap was most pronounced during each intercensal period from 1936 to the 1980s. The gap was reduced considerably and at its smallest during the 1990s/00s economic expansion period. A divergence in population growth rates then re-emerged following the recovery from the previous economic downturn although the gap declined somewhat from 2016-22. A divergence across economic metrics in the Western Region from the national average has been evident since 2011 and is likely related to the regional structures of employment and economic activity (Lydon and McGrath 2020; McGrath, Frost and McHenry 2021).

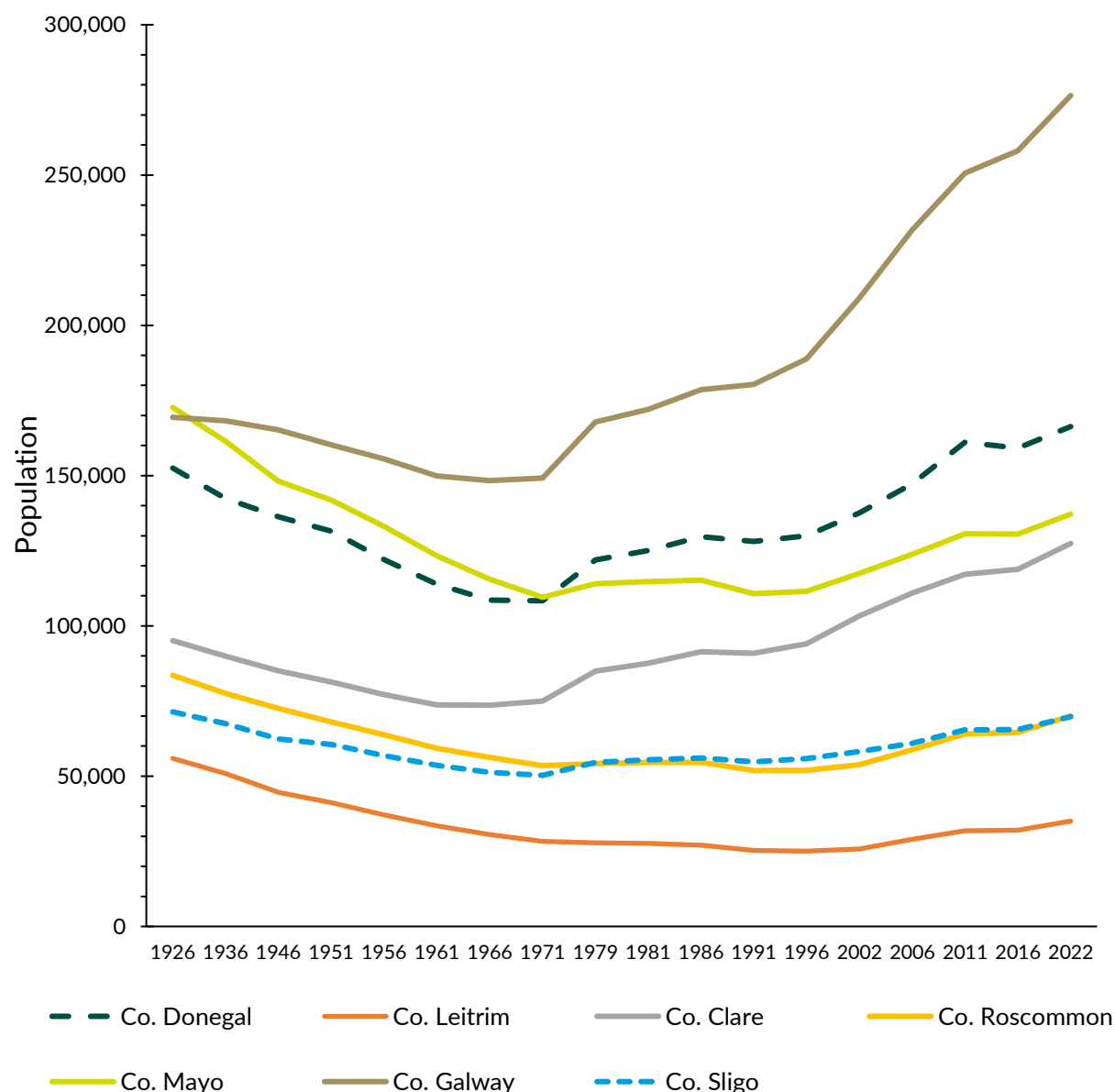
Figure 7 Population Growth Rates for each intercensal period Western Region and State 1936-2022.



Source: WDC Analysis of CSO data.

At the county level, there was a consistent population decline across the region from 1926-71 (Figure 8). Since then, Galway has experienced population growth in each intercensal period. Leitrim, in contrast, experienced a population decline in each period until 2002. All the other Western Region counties experienced population growth since 1971 except for the 1986-91 period and 2011-16 where Donegal and Mayo experienced a decline.

Figure 8 Population of Western Region Counties 1926-2022



Source: WDC Analysis of CSO data.

Examining the population changes from 1926 up to 2022, the Irish state had an estimated total population 178% higher than in 1926. The total population of the Western Region was 110% higher than in 1926. There was considerable within-region variation as only Galway (163%); Clare (138%) and Donegal (109%) have higher populations in 2022 than in 1926. Sligo (98%); Roscommon (84%); Mayo (79%) and Leitrim (63%) all had lower populations in 2022 than 1926.

3. Components of Population Change

Population change is driven by two factors:

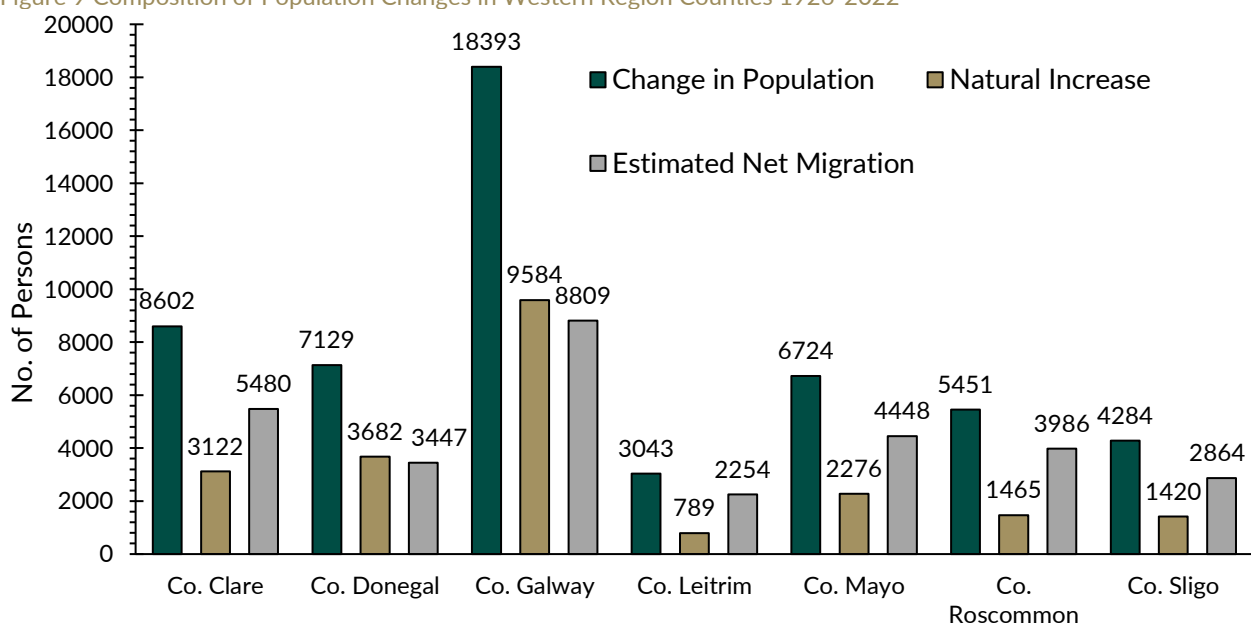
1. **Natural Increase:** the difference between the number of births and deaths.
2. **Net Migration:** the difference between the number of people who move into an area and the number who move out. Migration results from both 'internal migration' (movements within the country) and 'external migration'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

3.1 Components of Population Changes in the Western Region

As noted above, Donegal and Mayo both had population declines from 2011-16. The decline was driven by negative net migration as both counties had a positive natural increase in their population. All Western Region counties had negative net migration from 2011-16 and all had a positive natural increase in their population. Negative net migration was a general pattern across Ireland from 2011-16.

The preliminary Census 2022 results again showed a positive natural increase in each Western Region county but, in contrast to Census 2016, there was consistent positive net migration (Figure 9). Net migration was a larger component of population growth than the natural increase in five of the seven Western Region counties (Clare, Leitrim, Mayo, Roscommon, and Sligo). Net migration accounted for almost three-quarters of the population growth in Leitrim.

Figure 9 Composition of Population Changes in Western Region Counties 1926-2022

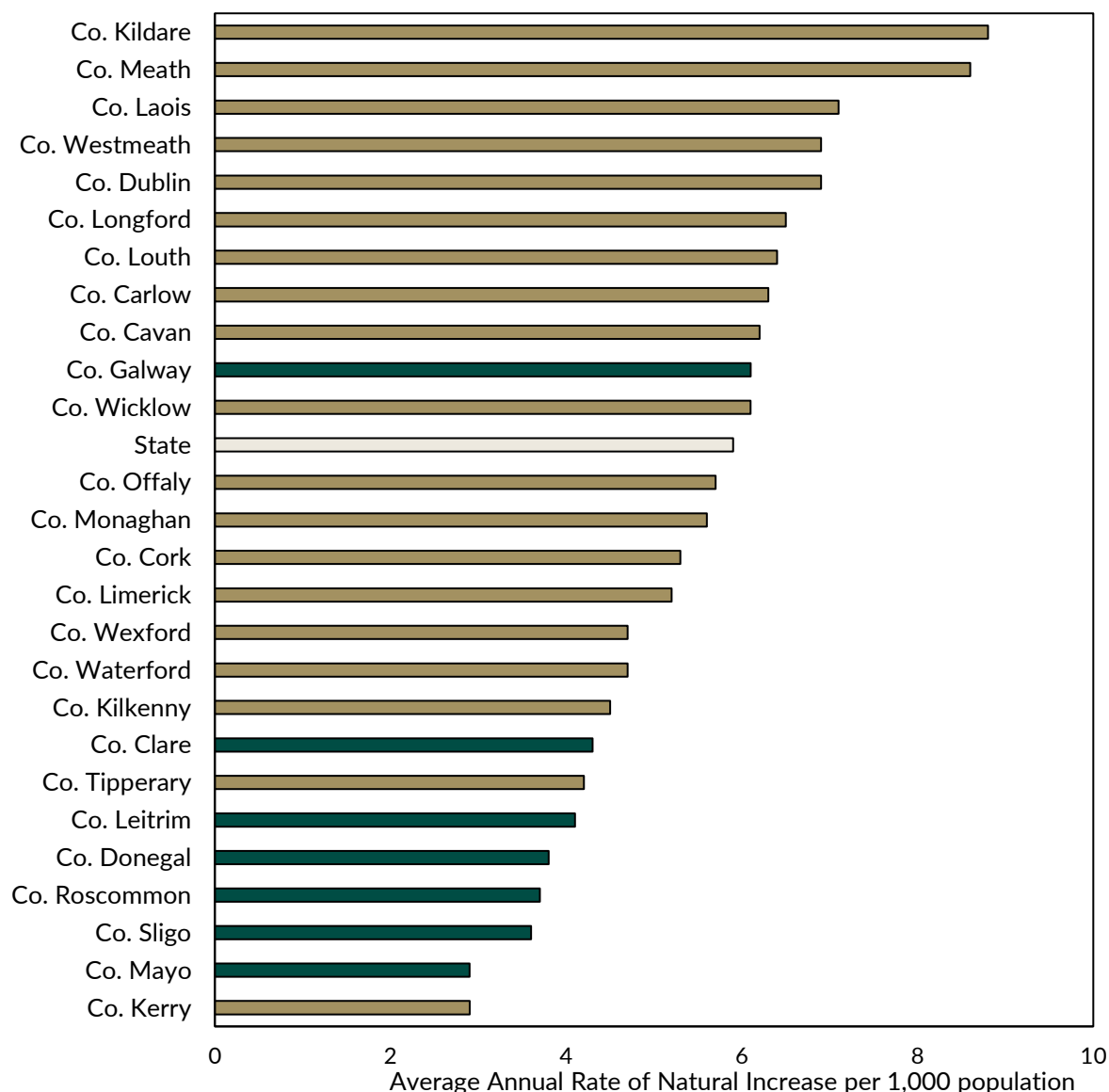


Source: WDC Analysis of CSO data

3.2 Natural Increase

Natural increase is the difference between the number of births and deaths. Of the Western Region counties, only Galway had an annual rate of natural increase above the national average (Figure 10). The remaining Western Region counties held six of the eight lowest annual rates of natural increase in the country.

Figure 10 Average Annual Rate of Natural Increase per 1,000 population

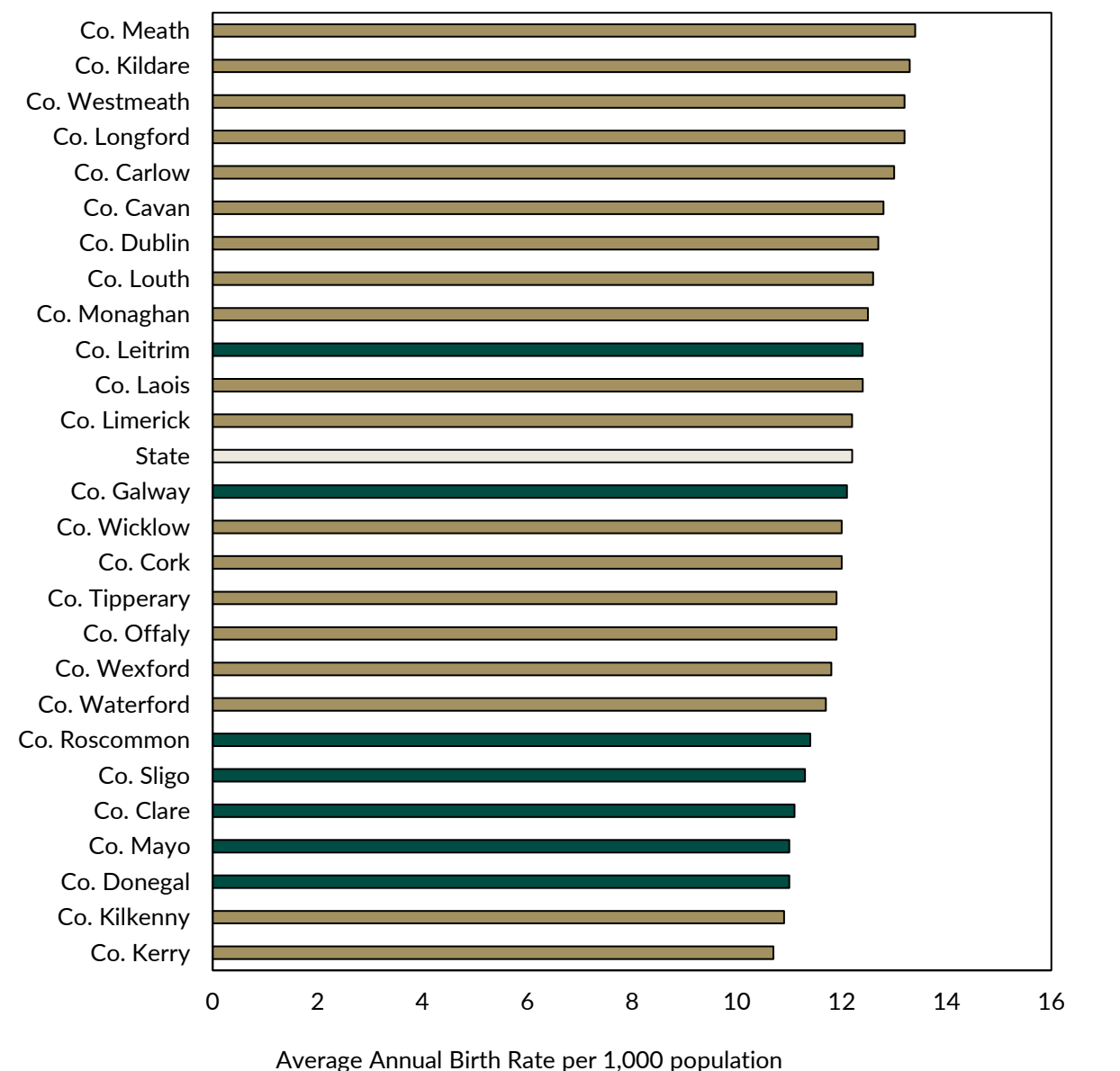


Source: WDC Analysis of CSO Data

Figures 11 and 12 demonstrate that the low rates of natural increase in the region are generally attributable to a combination of comparatively low birth rates and comparatively high death rates. Leitrim is an outlier as the county held a higher-than-average birth rate, but this was offset by the county holding the highest death rate in the country. The differences in natural increase reflect differences in age structures. Morgenroth (2018) found Leitrim found to have the least similar age structure to the national pattern.

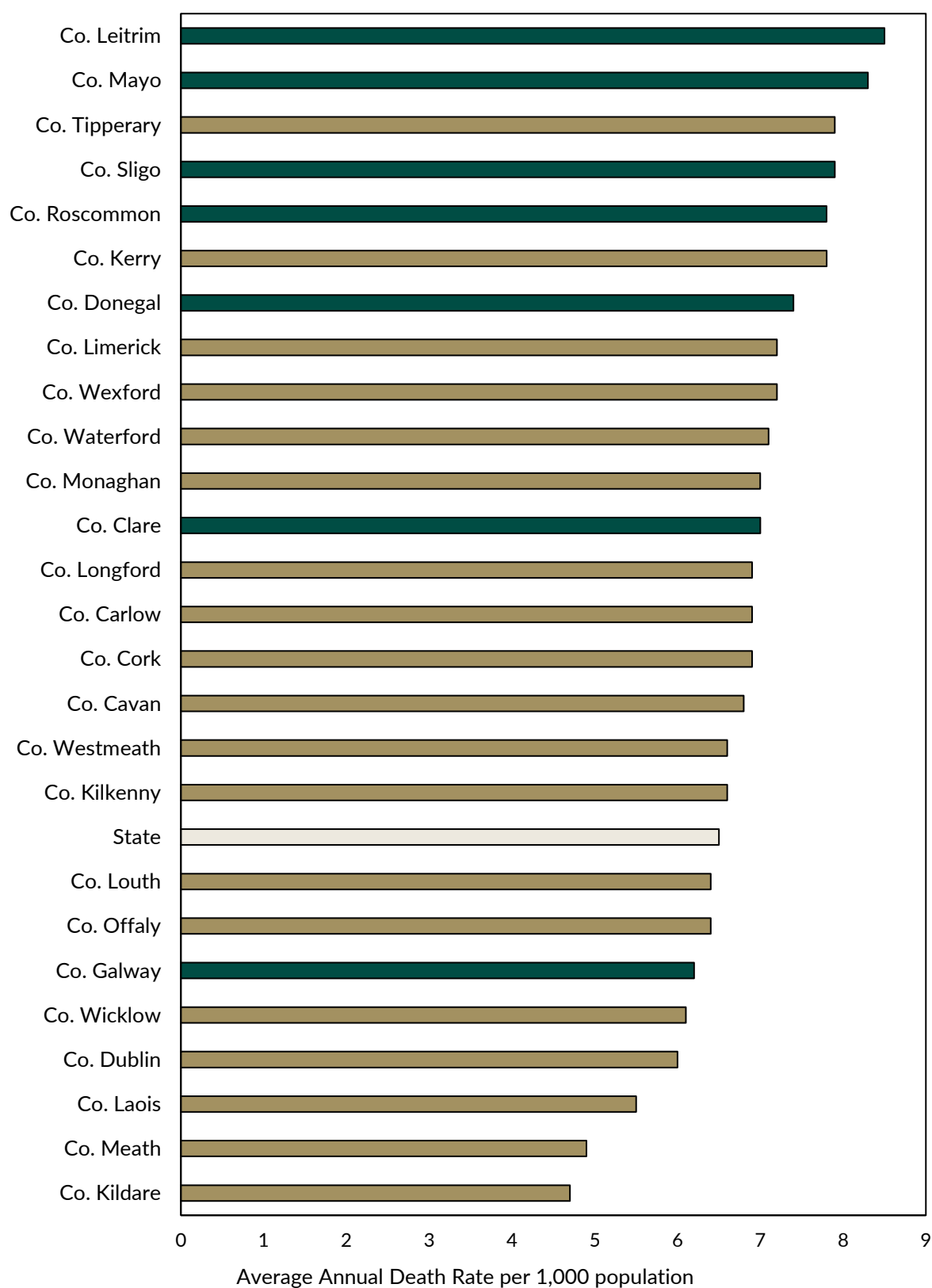
Morgenroth notes that *“differences in age structure have significant implications for the need for public services, impact on economic prospects and... the likely path of the population in the future”*. For example, the Western Region counties generally hold higher old-age and youth dependency ratios (McHenry, 2017). Higher dependency ratios mean there are fewer “economically active” persons to support the “economically inactive” population. Higher dependency ratios constrain future growth prospects and are related to longer-term historical structural issues such as the outward migration of the region’s working-age population. Higher regional dependency ratios highlight the importance of graduate retention as well as a focus on regional employment provision and diversification as key elements of regional development policies.

Figure 11 Average Annual Birth Rate per 1,000 population



Source: WDC Analysis of CSO Data

Figure 12 Average Annual Death Rate per 1,000 population

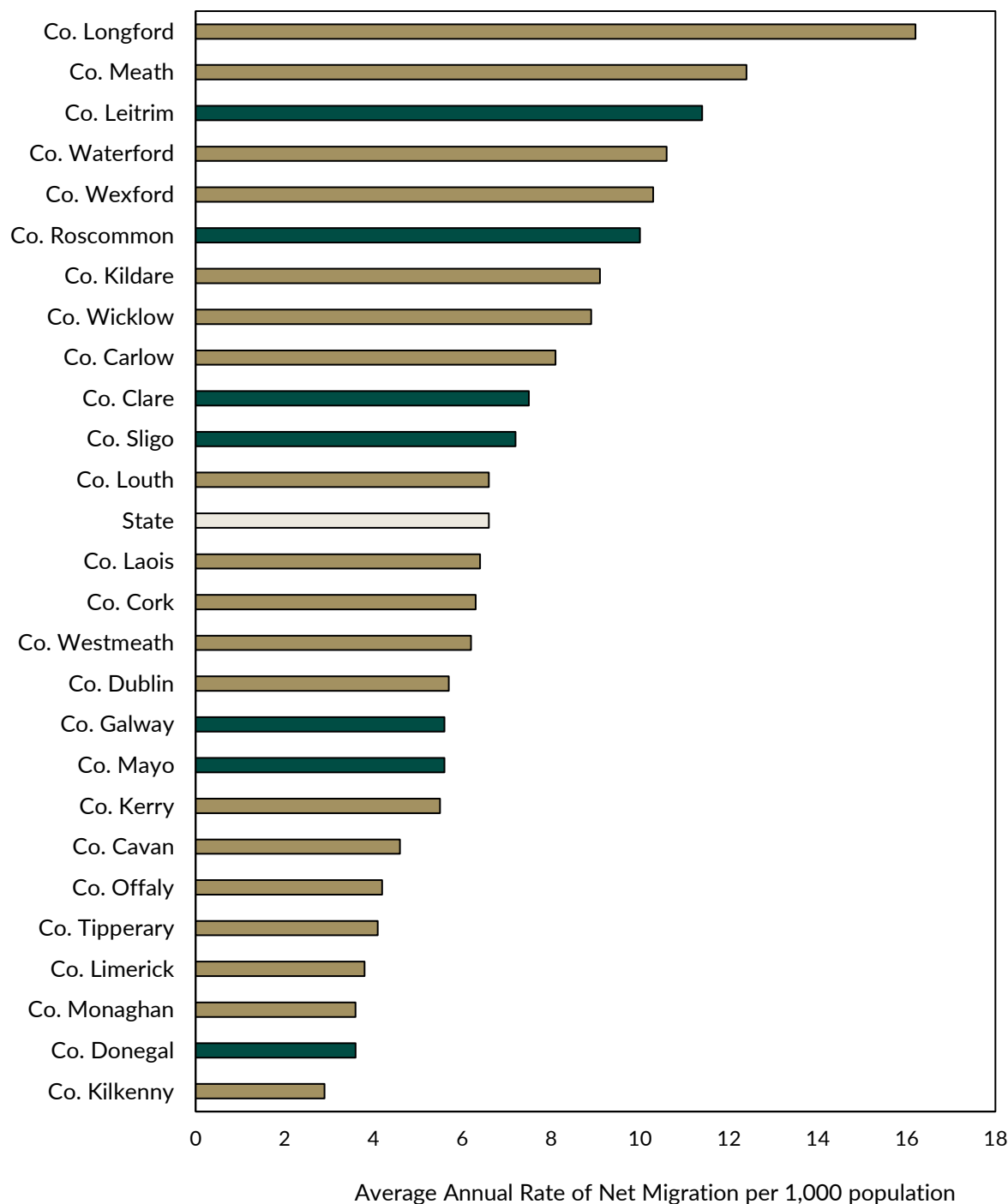


Source: WDC Analysis of CSO Data

3.3 Net Migration

The second source of population change is net migration – the difference between the number moving into an area and the number moving out. As noted above, all Western Region counties had positive net migration from 2016-22. Four Western Region counties had average annual net migration rates above the national average (Leitrim, Roscommon, Clare, and Sligo). Three Western Region counties had below-average net migration rates (Galway, Mayo, and Donegal).

Figure 13 Average Annual Rate of Net Migration per 1,000 population

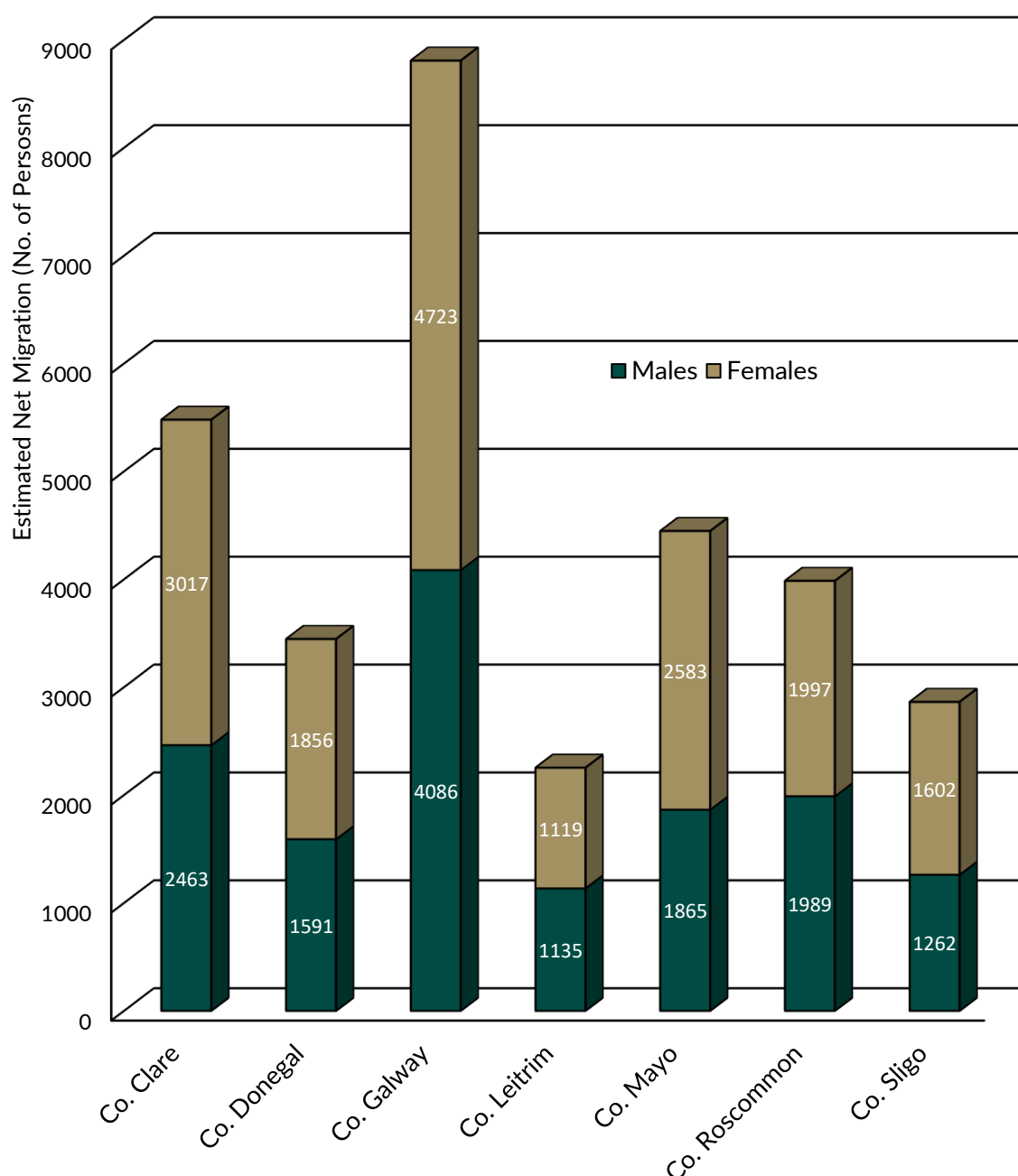


Source: WDC Analysis of CSO data

3.3.1 Net Migration by Sex

Figure 14 illustrates net migration by sex in the Western Region counties. Positive net migration was recorded for both females and males across the Western Region. Female migration was higher than male migration across the region, except in Roscommon and Leitrim. Positive male migration represents a reversal of the 2011-16 trend when there were sharp declines in the male population across the region. The male decline reflected the direct connection between job losses in construction and related manufacturing sectors and the greater share of outward migration by men.

Figure 14 Net Migration by Sex in the Western Region.

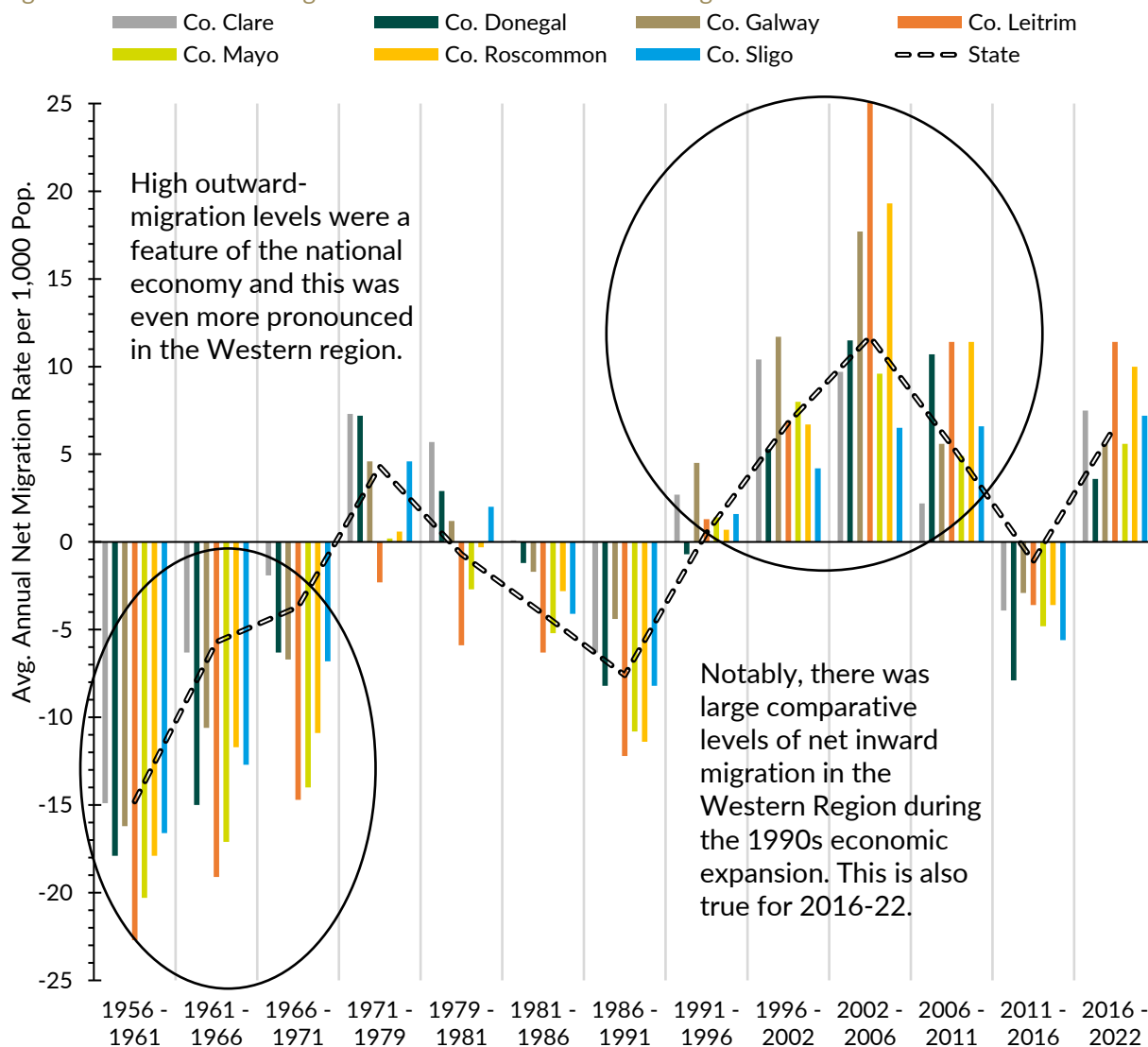


Source: WDC Analysis of CSO data.

3.3.2 Historical Net Migration 1956-2022.

Figure 15 illustrates the historical migration patterns across the Western Region and State for each intercensal period since 1956. All Western Region counties experienced negative migration from 1951-71. High outward-migration levels were a national phenomenon during that period and were even more pronounced in the Western Region. During the 1970s all Western Region counties except Leitrim moved into positive migration. Negative migration returned during the 1980s until the economic expansion of the 1990s when all western counties had positive migration until 2011. Notably, there were large comparative levels of net inward migration in the Western Region during the 1990s/00s economic expansion. The rates of positive net migration during that period far exceeded the 1970's. Comparatively large positive net migration re-emerged across the Western Region for 2016-22.

Figure 15 Historical Net Migration in the State and Western Region counties: 1956-2022.



Source: WDC Analysis of CSO data.

4. Housing

4.1 The Housing Stock in the Western Region.

The preliminary estimates from Census 2022 show that the Western Region had a total housing stock of 399,785, an increase of 4.2% or 16,943 since 2016. Nationally, there was an increase was 6.0% over this period or 120,945 (Table 10). The housing stock increased in each Western Region county ranging from 3.1% in Roscommon to 5.7% in Galway. The increase in the housing stock followed a period of sustained economic growth. There were much lower levels of growth in housing stock from 2011-16 during the aftermath of the housing bust and economic recession.

Table 10 Housing Stock in the Western Region 2016 and 2022.

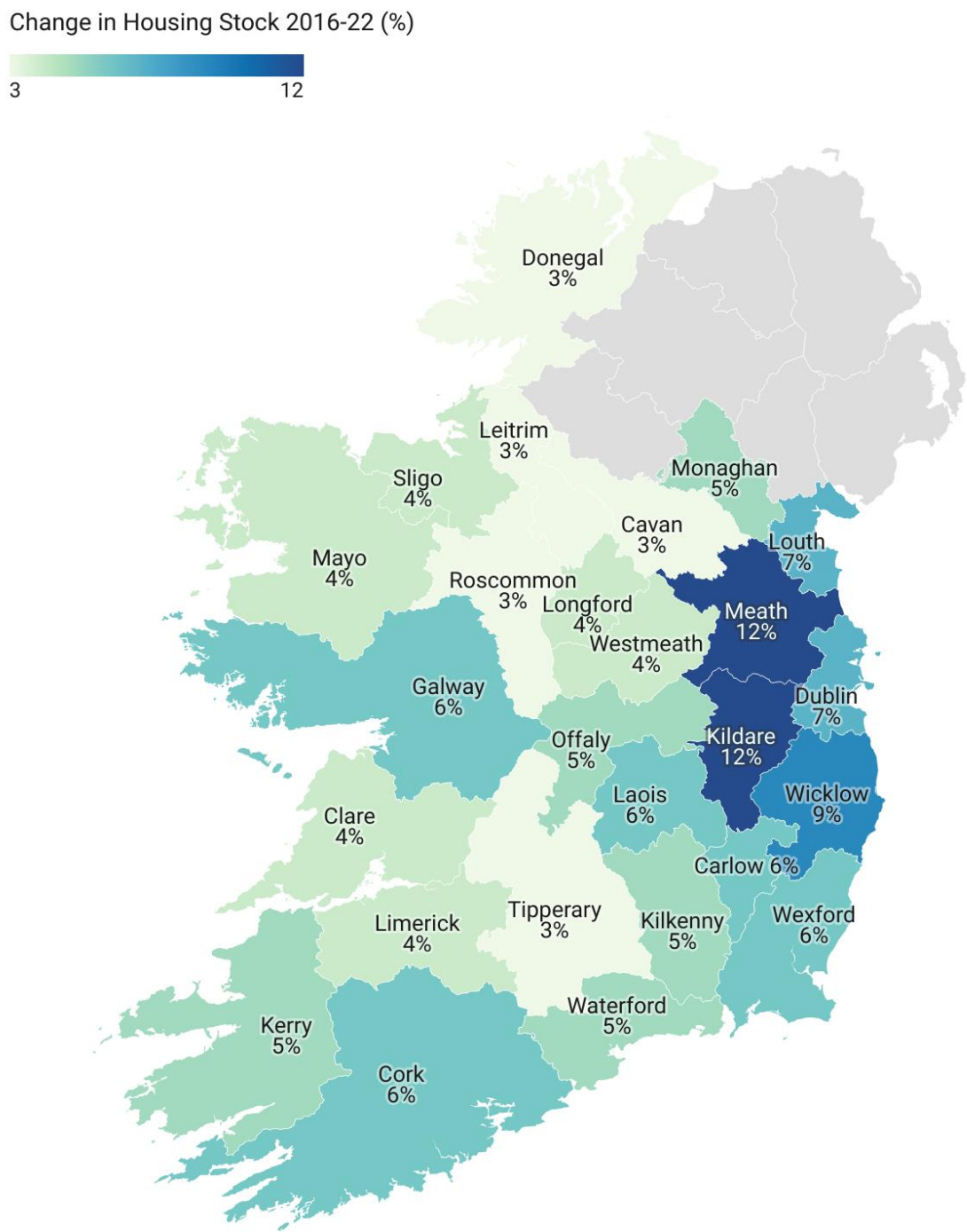
	Housing Stock 2016	Housing Stock 2022	Actual Change	% Change
Co. Clare	55,779	58,148	+2,369	4.2%
Co. Donegal	83,931	86,849	+2,918	3.5%
Co. Galway	112,054	118,443	+6,389	5.7%
Co. Leitrim	18,051	18,657	+606	3.4%
Co. Mayo	65,921	68,735	+2,814	4.3%
Co. Roscommon	31,285	32,265	+980	3.1%
Co. Sligo	32,764	33,991	+1,227	3.7%
Western Region	399,785	416,728	+16,943	4.2%
State	2,003,645	2,124,590	+120,945	6.0%
State Ex. Dublin	1,472,892	1,556,553	+83,661	5.7%

Source: WDC Analysis of CSO data.

4.2 Population Changes and the Housing Stock.

As noted in Section 2, population growth occurred in every county from 2016-22 and was relatively concentrated in Leinster. These trends were largely mirrored in the growth of the housing stock. All counties saw growth in housing stocks with the largest increases concentrated in Leinster; Meath (12%), Kildare (12%) Wicklow (9%) Louth (7%) and Dublin (7%). The lowest increases in the housing stock from 2016-22 were recorded in the Western Region (3% in Donegal, Leitrim, and Roscommon).

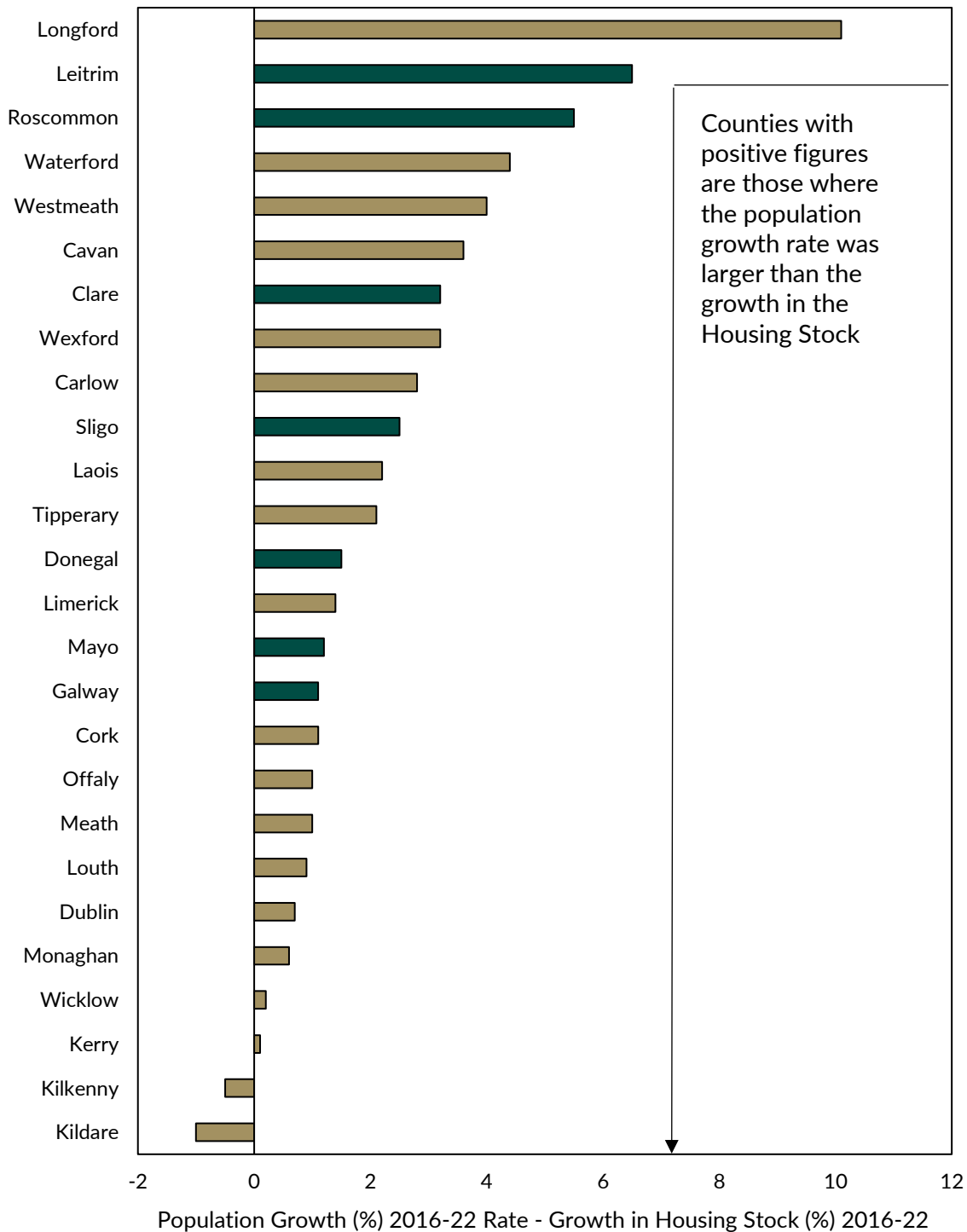
Figure 16 Changes in Housing Stock by County, 2016-22.



Source: WDC Analysis of CSO data • Created with Datawrapper

The pace of growth in the housing stock was slower than the population growth rate for most counties from 2016-22. Figure 17 shows that for all Western Region counties (and all counties except Kilkenny and Kildare), the population grew at a faster rate than the housing stock from 2016-22. Leitrim and Roscommon recorded a particularly large gap between population growth and growth in the housing stock. However, as discussed below, this is a recent phenomenon. Longford as an outlier is explained in footnote 2 above.

Figure 17 Population Growth versus Growth in the Housing Stock by County 2016-22.

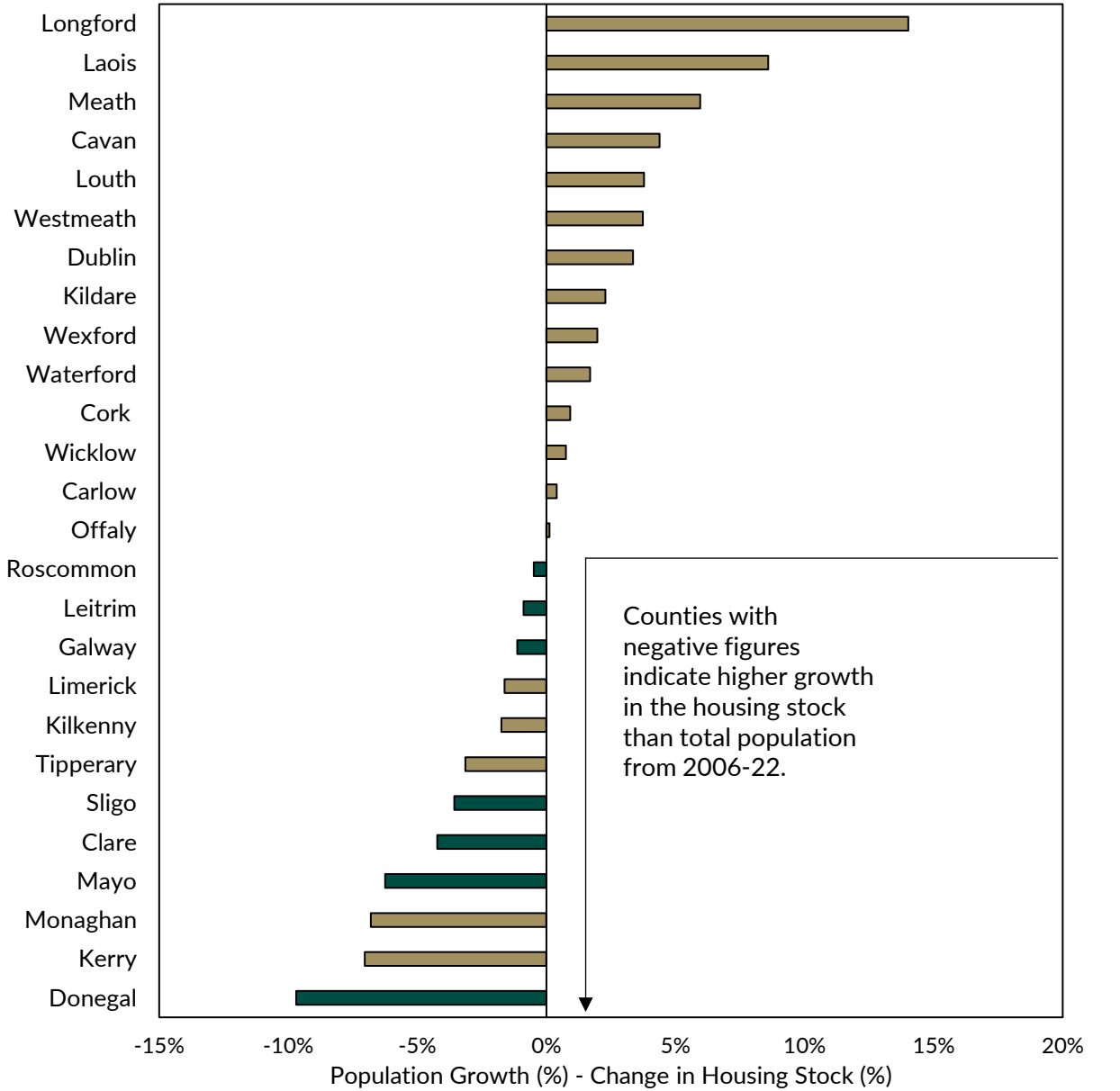


Source WDC Analysis of CSO Data

The most recent Census hides important context as it falls outside of the dynamics of the housing boom and bust. From 2006-16, there was an increase in the housing stock of 16.4% in the Western Region almost double the population growth rate (8.7%). The disparity between the region’s housing stock growth and population growth, at almost 8 percentage points, was comparatively large. The national housing stock grew 14.3% compared with 12.3% population growth, a gap of two percentage points.

Figure 18 shows the difference between population and housing stock growth from 2006-2016 and can be compared with Figure 17 to illustrate the longer historical context. There are far more counties where the housing stock has grown at a faster rate than the population from 2006. This appears to be a regional phenomenon as all seven Western Region counties, and just five others, recorded faster growth in the housing stock than the population from 2006-22.

Figure 18 Population Growth versus Growth in the Housing Stock, by County 2006-22.

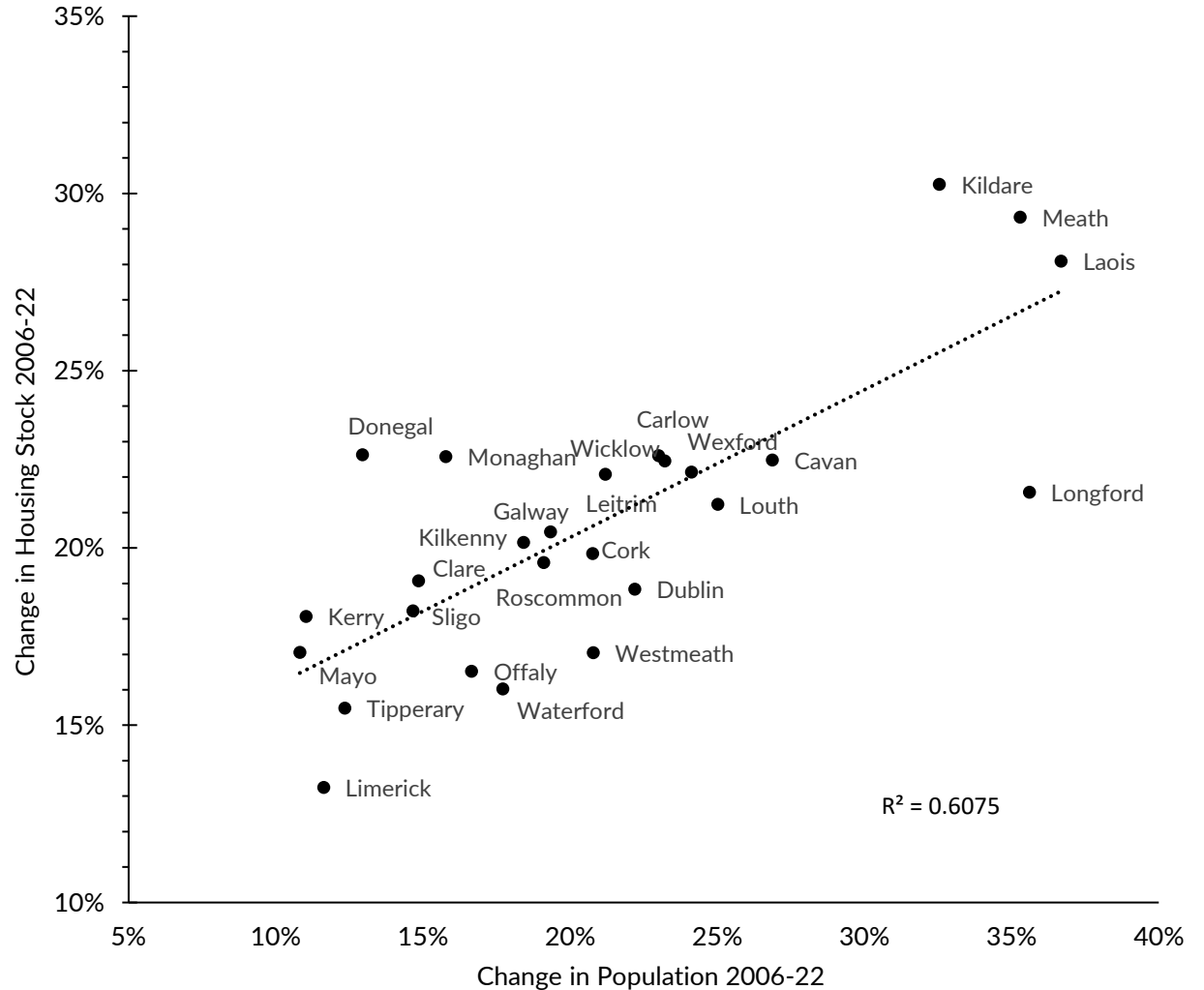


Source: WDC Analysis of CSO Data.

Within this longer-term context, the comparatively low growth in the region’s housing stock from 2016-22 may be viewed, at least somewhat, as a correction from the historically strong regional housing stock growth noted above. Large declines in vacancy (see below) combined with historically strong housing stock growth suggest there may have been comparatively greater capacity in the Western Region to accommodate population growth. These factors may help to explain the comparatively low regional housing stock growth from 2016-22. In recent years, coinciding with the pandemic period, there has been a sharp shortage of regional housing as this comparative capacity has been absorbed, with regional housing demand rising sharply (See WDC [Timely Economic Indicators](#) series). These factors may help to explain the sharp increase in regional house prices over the pandemic period and highlight the need to increase regional housing supply into the future.

Over the longer term, there has been a strong positive correlation between population growth and growth in the housing stock (Figure 19). The strong positive correlation means that those counties with higher population growth have generally seen higher growth in the housing stock.

Figure 19 Changes in Population Versus Housing Stock 2006-2022.



Source: WDC Analysis of CSO data.

4.3 Vacancy Rates in the Western Region

The housing stock comprises occupied households and vacant dwellings. Dwellings under construction and derelict properties are not included in the Census count of vacant dwellings.⁷ The vacancy rate measures the share of the housing stock in each county that is recorded as a vacant dwelling by the Census enumerators thus offering a point-in-time estimate. The CSO note that a dwelling classified as vacant for census purposes does not necessarily imply that it is available for re-use. The CSO also caution that the Census vacancy results are not directly comparable with other sources given differences in methodology.

In line with historical patterns, the vacancy rates in the Western Region were higher than the national average of 7.8%. The average vacancy rate in the Western Region in 2022 was 11.4%, ranging from 8.3% in Galway City to 15.5% in Leitrim (Table 11). The most common reasons for vacancy were “deceased” or “rental property”.

Table 11 Vacancy Rates in the Western Region and State 2022.

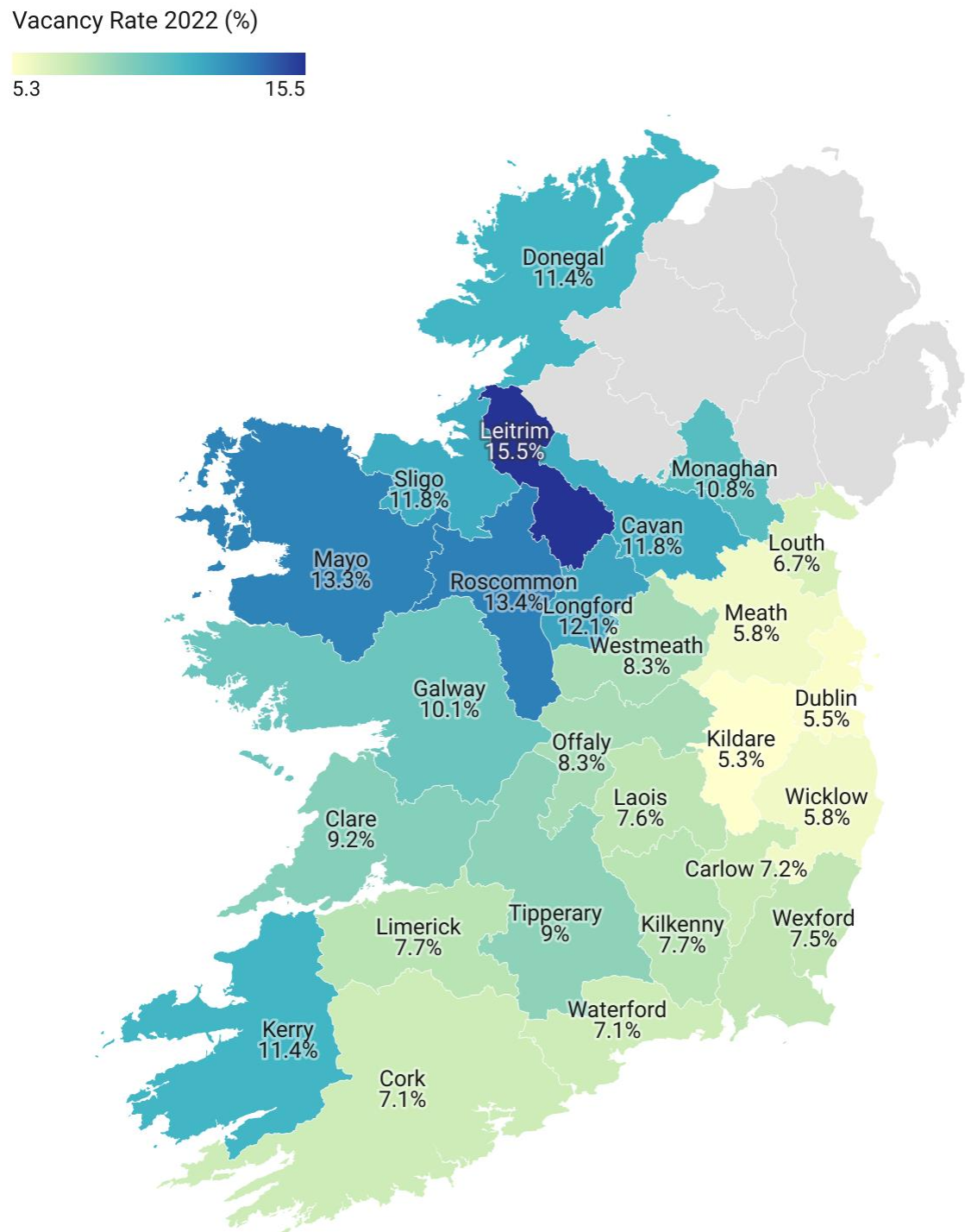
2022	State	Western Region	Clare	Donegal	Galway City	Galway County	Leitrim	Mayo	Roscommon	Sligo
Housing Stock	2,124,590	416,728	58,148	86,489	35,594	82,849	18,657	68,735	32,265	33,991
Total vacancies	166,752	47,638	5,369	9,851	2,963	9,045	2,897	9,166	4,326	4,021
Vacancy Rate (%)	7.8	11.4	9.2	11.4	8.3	10.9	15.5	13.3	13.4	11.8
<i>Reasons for Vacancy (as a % of Total Vacancies)</i>										
Rental Property	21%	20%	17%	24%	38%	17%	20%	19%	16%	19%
Renovation	14%	12%	14%	11%	12%	13%	12%	12%	13%	13%
With Relatives	3%	3%	4%	3%	5%	4%	2%	3%	3%	3%
Deceased	16%	21%	18%	22%	6%	24%	21%	24%	25%	17%
Nursing Home / Hospital	7%	5%	6%	5%	4%	5%	5%	5%	6%	5%
For Sale	11%	9%	8%	9%	11%	7%	9%	8%	10%	9%
Farmhouse	7%	12%	13%	7%	1%	13%	17%	14%	14%	16%
Emigrated	1%	2%	2%	2%	1%	3%	1%	2%	1%	2%
New Build	4%	4%	5%	4%	3%	5%	2%	3%	3%	2%
Other reason / Not Stated	15%	12%	14%	14%	21%	9%	10%	9%	10%	15%

Source: WDC Analysis of CSO Data.

⁷ Census definition of a vacant dwelling: A dwelling is classed as vacant by census enumerators if it is unoccupied on Census night, is not used as a holiday home and is not usually inhabited by occupants who are temporarily absent at the time of census. A dwelling being classified as vacant for census purposes does not necessarily imply that it is available for re-use.

Figure 20 illustrates that the highest vacancy rates in the country were recorded in the Western Region. The four highest vacancy rates were recorded in the Western Region; Leitrim 15.5%; Roscommon 13.4%; Mayo 13.3% and Sligo 11.8%.

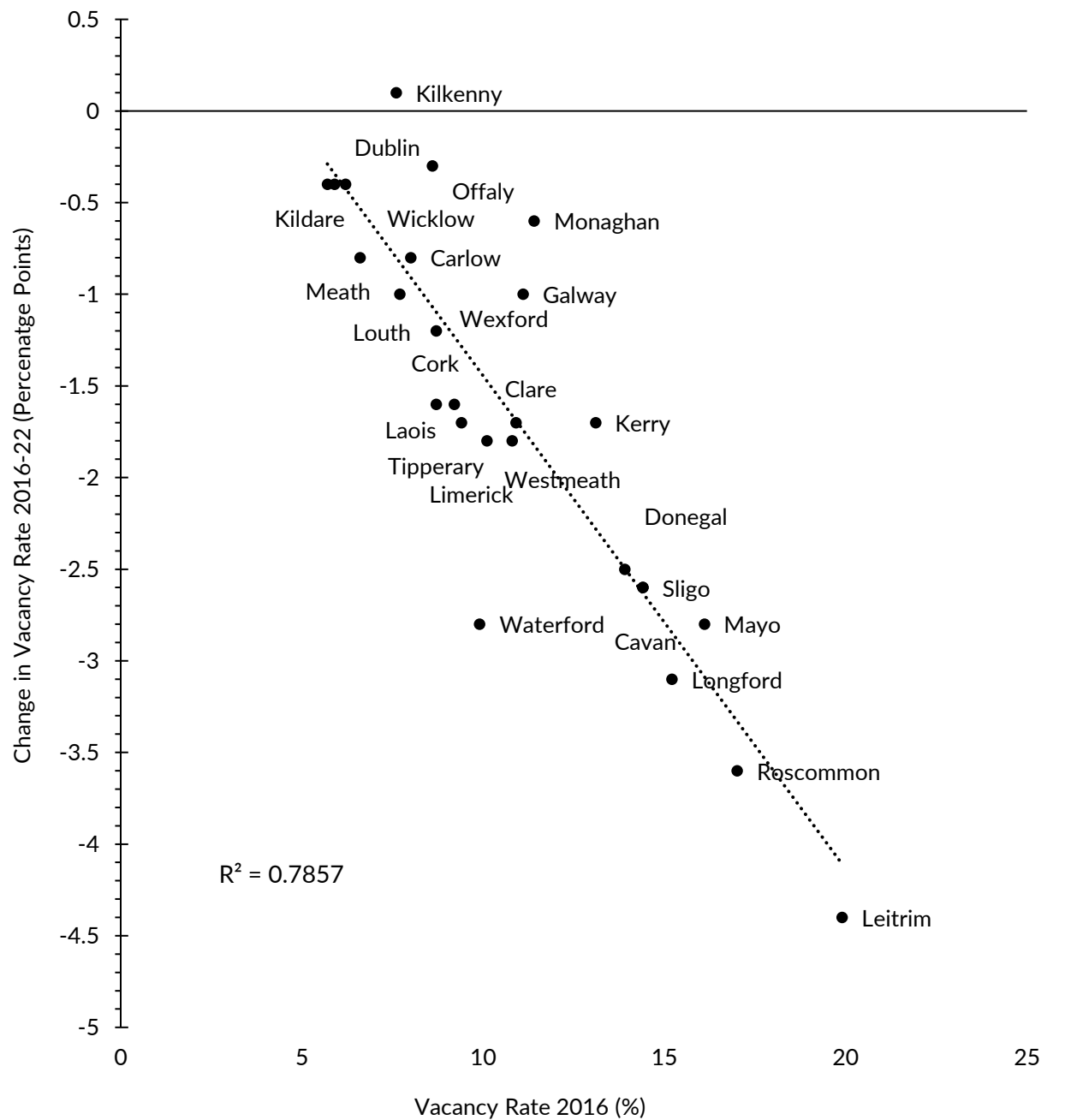
Figure 20 Vacancy Rates by county 2022.



Source: WDC Analysis of CSO data • Created with Datawrapper

Figure 21 shows the strong negative correlation between vacancy rates in 2016 and changes in vacancy rates from 2016-22. This negative correlation means that while the Western Region recorded the highest vacancy rates in 2022, the region also recorded the highest declines in vacancy rates from 2016-22. Leitrim recorded a sharp decline from a vacancy rate of 19.9% in 2016 to 15.5% in 2022.

Figure 21 The Relationship between vacancy rates in 2016 and changes in vacancy rates 2016-22.



Source: WDC Analysis of CSO Data.

5. Policy Insights

The National Planning Framework (NPF) shapes long-term economic and spatial development and associated infrastructure investment. The preliminary Census 2022 estimates suggest there has been population growth across the Western Region and State from 2016-22. The population in some Western Region counties appears to have grown faster than the NPF projections and some counties have grown slower. For areas where population growth is outpacing NPF projections, this raises questions about the level of infrastructure to support such growth. For counties with slower than expected growth, hitting local authority housing targets and broader regional employment targets take on even greater importance.

The NPF also targets the regional distribution of population and employment growth, at the NUTS 2 regional level, up to 2040. The overarching target is for population and employment growth in the Eastern & Midland region to be matched by the combined Southern and Northern & Western Regions. The preliminary evidence, albeit over the shorter-term, tentatively suggests a continued dominance of population and employment growth in the Eastern & Midland region. A continuation of concentrated population and employment growth in the Eastern & Midland region coupled with accelerated population growth should give pause to consider the implications in terms of the NPF. There is a need to ensure the adequate development and funding of regional public services and infrastructure and broader supports to reach regional employment and population targets.

The WDC has identified key regional issues in the context of the NPF within [WDC Policy Briefing No 8](#). The WDC argues that future policy must reduce regional infrastructure deficits to enhance regional connectivity and accessibility and provide broader supports for regional innovation and the '3Es' of enterprise, employment, and education to promote regional development. The pandemic has shown us that regional entrepreneurs can respond dynamically but regional entrepreneurs are constrained by infrastructure deficits in terms of both digital and physical infrastructure. Connectivity and accessibility can have a large influence on the choice of location for both indigenous and foreign investors. The WDC leads the connectedhubs.ie national hubs network that will help to support access to public enterprise supports, access to education and through remote work offer employees the opportunity to work in a broadband connected hub. The international literature suggests that regional productivity gaps can be closed by shifting policy interventions towards strengthening the inherent capacity of rural areas across economic sectors (OECD, 2019). Regions must be able to mobilise their assets to take full advantage of their growth potential. Research conducted by the WDC has identified several areas where the region can develop a global competitive advantage (O'Brien, 2021). The areas include, renewable energy, life sciences (which includes

medtech), artificial intelligence, data and analytics and the creative economy. The WDC is actively working to develop these sectors through the sustainable enterprise pillar of its 2019-2024 strategy. The climate transition also offers opportunities for regional development. Research by the WDC Policy Analysis team outlines the regional opportunities and challenges in this regard (McHenry, 2021).

At the sub-county level, the historical experience has been a consistent decline in rural populations, particularly within more remote areas. The preliminary Census 2022 results suggest that this overall trend has continued. However, some urban areas have experienced population loss and some rural areas have experienced consistent population growth over the longer term. These trends suggest that not all “rural” nor all “urban” areas can be considered the same. A general lesson to be taken is that public policy formation should consider an appropriate spatial scale, particularly concerning peripheral and rural areas, which as indicated above, can be diverse in needs. Better data at lower spatial scales would be welcome, not just in relation to population changes but also for public services, mobility, infrastructure and living standards, more generally. The WDC is actively pursuing research surrounding better regional economic and social data. The WDC Policy Analysis Team currently publishes a quarterly regional based Timely Economic Indicators report and is currently working on Sustainable Regional Development/Well-Being Indicators and Regional Mobility indicators.

An analysis of the core components of population change reveals a reversal of the 2011-16 trend of negative net migration across the Western Region. Net inward migration was not only positive but outweighed the natural increase in Clare, Leitrim, Mayo, Roscommon, and Sligo. Historically, there were large comparative levels of net positive migration in the Western Region during the 1990s economic expansion. Comparatively, large net positive migration re-emerged in the Western Region for 2016-22, a reversal of the 2011-16 negative trend. Within the region, only Galway had an annual rate of natural increase above the national average. The remaining Western Region counties held six of the eight lowest annual rates of natural increase in the country. The low rates of natural increase in the region are generally attributable to a combination of comparatively low birth rates and comparatively high death rates that likely reflect differences in age structures. For example, the Western Region counties generally hold higher old-age and youth dependency ratios suggesting that there are fewer “economically active” persons to support the “economically inactive” population. Higher dependency ratios act as a constraint for future growth prospects and are related to longer-term historical structural issues such as the outward migration of the region’s working-age population. Graduate retention and a focus on regional employment provision and diversification should be seen as a key element of regional development policies to address these structural issues.

Concerning regional housing, the housing stock in all Western Region counties grew. Population growth from 2016-22 was relatively concentrated in Leinster and these trends were mirrored in the growth of the housing stock. Western Region counties recorded the lowest housing stock increases in the state and all seven counties recorded growth below the national average. The population grew at a faster rate than the housing stock in all Western Region counties from 2016-22. Vacancy rates across the Western Region were higher than the national average in 2022, in line with historical patterns. The region also recorded the largest declines in vacancy rates. The most recent Census period hides some important context as it falls outside of the dynamics of the housing boom and bust. An analysis over the longer term reveals that the comparatively low increase in the Western Region's housing stock from 2016-22 may be viewed, at least somewhat, as a correction from the historically strong regional housing stock growth noted above. Large declines in vacancy combined with historically strong housing stock growth suggest there may have been comparatively greater capacity in the Western Region to accommodate population growth. These factors may help to explain the comparatively low regional housing stock growth from 2016-22. In recent years, there has been a sharp shortage of regional housing as this comparative capacity has been absorbed, with regional housing demand rising sharply. These factors may help to explain the sharp increase in regional house prices over the pandemic period and highlight the need to increase regional housing supply into the future.

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**WESTERN
DEVELOPMENT
COMMISSION**

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