



Policy Briefing No. 9

Regional Insights: Preliminary Census 2022

Dr Luke McGrath
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WDC Policy Briefings:

The Western Development Commission (WDC) is a statutory body promoting economic and social development in the Western Region of Ireland (counties Donegal, Sligo, Leitrim, Mayo, Roscommon, Galway, & Clare). WDC Policy Briefings highlight and provide discussion and analysis of key regional policy issues.

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Read more:

McGrath L., 2022. Preliminary Results Census 2022: Analysis of results for the Western Region. WDC Report.

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Introduction

The Central Statistics Office (CSO) published preliminary results from Census 2022 in June. The preliminary results provide key regional insight across a range of areas.¹ This Western Development Commission (WDC) Policy Briefing analyses the preliminary Census 2022 results for the seven county Western Region (Clare, Donegal, Galway, Leitrim, Mayo, Roscommon, and Sligo). The areas examined are geographical population change; components of population change and housing. A more detailed analysis is contained within the WDC report: Preliminary Results Census 2022: Analysis of Results for the Western Region.

Geographic Changes in Population

The Western Region's population was estimated to be 888,323 in 2022, up 6.5% from 2016 (Table 1). The population growth rate in the Western Region was lower than the national average meaning the region's share of the total population fell slightly from 17.4% in 2016 to 17.2% in 2022. All Western Region counties recorded growth from 2016-22. The previous Census showed two Western Region counties (Mayo & Donegal) recorded population declines from 2011-16.² The sharp growth in Roscommon led to the county overtaking Sligo in terms of 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 17.4% of State	882,323 17.2% of State	+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 The results are subject to revision when the full results are published next year.

² Sligo recorded a decline from 2011-16 but only in the provisional data, revisions showed a slight rise of 0.2%.

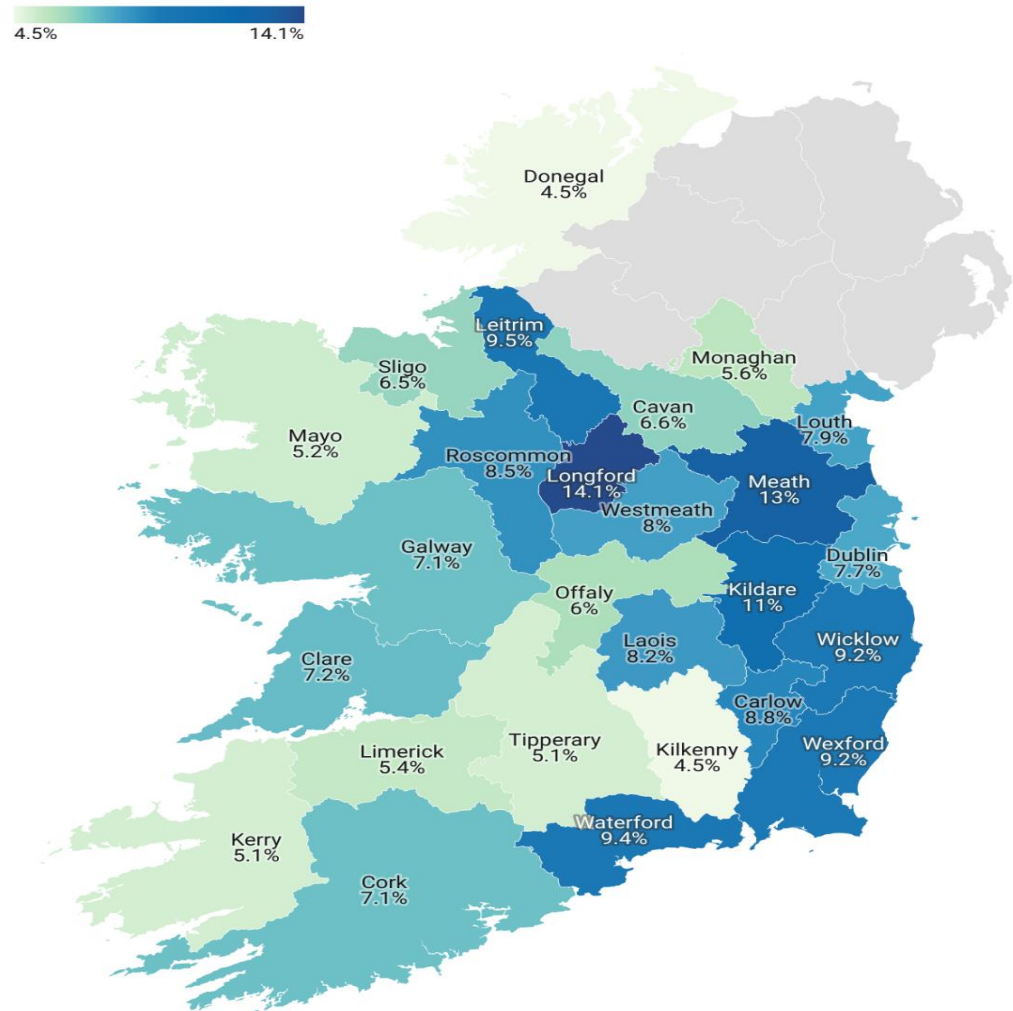
The population of the 7 county Western Region was estimated to be 888,323 in 2022.

All Western Region counties recorded population growth from 2016-22.

Two counties in the region (Leitrim & Roscommon), grew at a faster rate than the national average of 7.6%.

Figure 1 provides a map of the population changes for each county in the State from 2016-22. Two Western Region counties recorded higher population growth than the national average (Leitrim & Roscommon). Counties in Leinster recorded the highest population growth.

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



Source: CSO Ireland • Created with Datawrapper

Figure 2 illustrates population changes at the sub-county Electoral Division (ED) level. Of the 950 EDs in the region where data was available, 80% showed population increases or no change and 20% experienced population declines from 2016-22. 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. The historical experience has been a consistent decline in rural populations, particularly within more peripheral areas. The preliminary Census 2022 estimates 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 (O'Driscoll et al., 2022).³

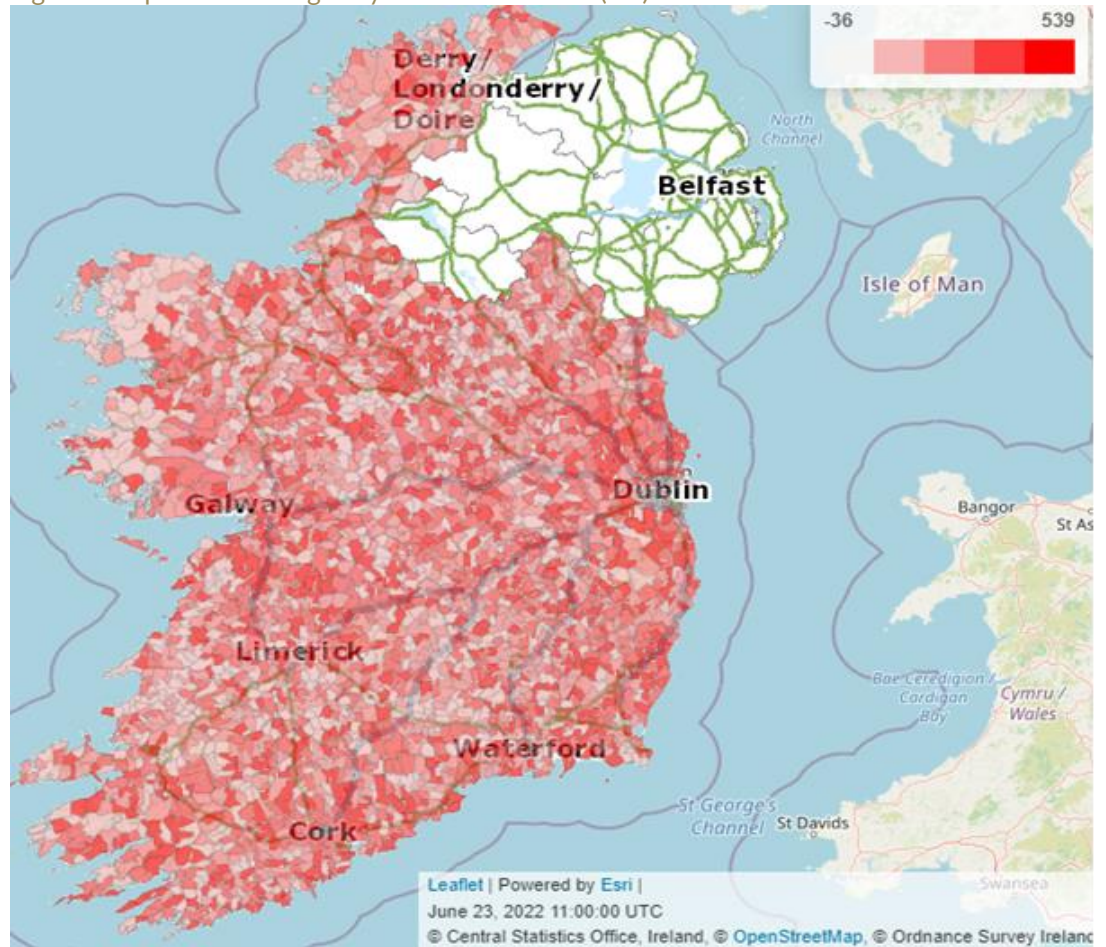
³ O'Driscoll et al., 2022. The spatiotemporal dimension of population change in Ireland: visualisation of growth and shrinkage in Irish Electoral Divisions (1986-2016), Journal of Maps.

The counties recording the highest population growth were in Leinster.

Population growth across the Western Region from 2016-22 was generally lower than the national average.

Due to comparatively lower growth, the region's share of the total population fell slightly from 17.4% in 2016 to 17.2% in 2022.

Figure 2 Population Changes by Electoral Division (ED) 2016-22



Source: Map created through CSO PXstat database.

Figure 3 illustrates the historical pattern of population growth rates in the Western Region for each intercensal period from 1936. The Western Region has experienced rates of population change between censuses that were considerably below those in the rest of the state. In each intercensal period from 1936-51 the Western Region experienced population decline while the rest of the state had population growth. From 1961-71 the region again had a population decline while the rest of the state had population growth. The state and the region recorded strong population growth during the 1990s/00s economic expansion period and importantly the gap was at its smallest margins during this expansion period. A divergence in population growth rates 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 structures of employment and economic activity (Lydon and McGrath 2021; McGrath, Frost and McHenry 2022).⁴

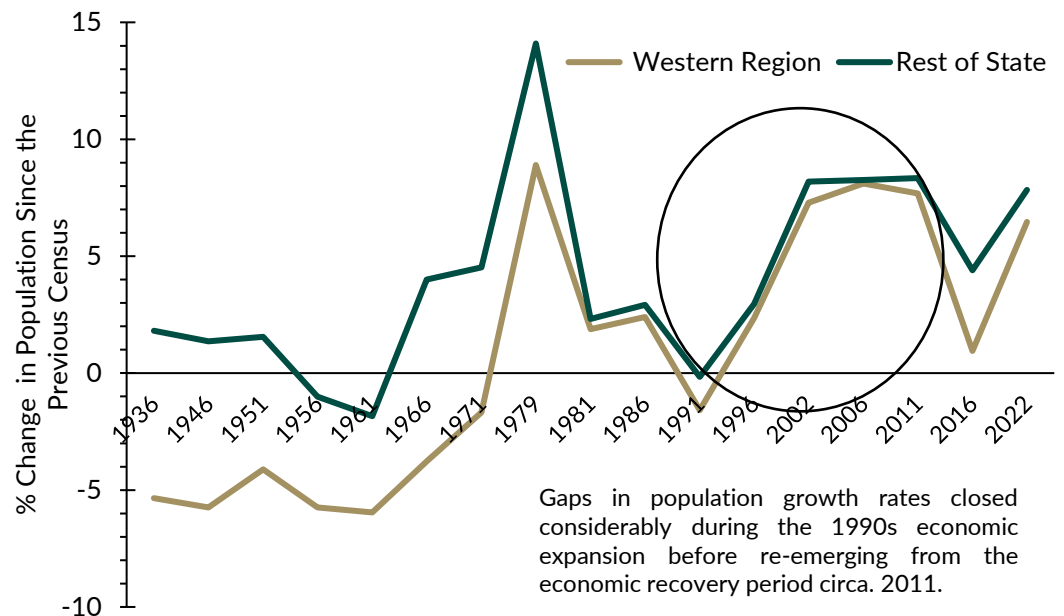
⁴ Lydon, R. & McGrath L. 2020. Regional impact of COVID-19: Western Region & Atlantic Economic Corridor, Economic Letters 10/EL/20, Central Bank of Ireland.
McGrath, L., Frost D., & McHenry H., 2022. The Revised National Development Plan: Key Regional Issues. Policy Briefing No. 8. Western Development Commission.

In general, the Electoral Districts (EDs) in the Western region had comparatively low population growth rates and higher shares with population declines.

Historically, the region has had lower population growth than the national average. A large gap re-emerged following the recovery from the previous economic downturn. The gap declined somewhat from 2016-22.

Galway, Clare & Donegal have higher populations in 2022 than 1926. Sligo, Roscommon, Mayo & Leitrim all had lower.

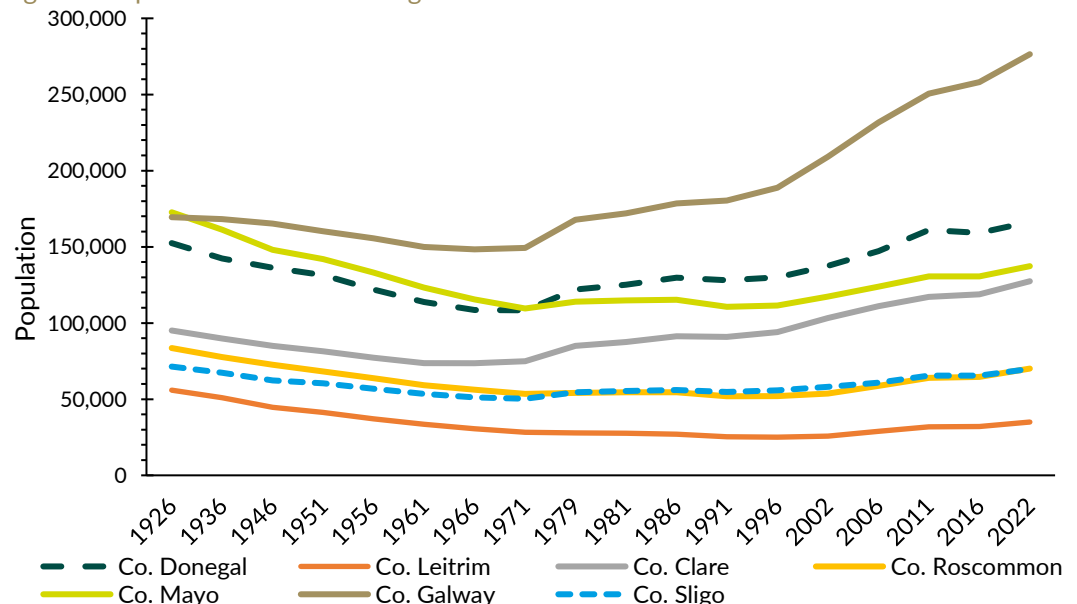
Figure 3 Pop. Growth Rates since the Previous Census Western Region and State 1936-2022.



Source: WDC Analysis of CSO data.

At the county level, there was a consistent population decline from 1926-71 (Figure 4). Since then, there has been variation. Galway experienced population growth in each intercensal period since 1971. Leitrim, in contrast, experienced a population decline in each period until 2002. The other counties recorded population growth since 1971 except for the 1986-91 period. Donegal and Mayo experienced a decline from 2011-16. Comparing 2022 to 1926, the Irish state had an estimated total population 178% higher. The Western Region's population was 110% higher. There was considerable within-region variation as Galway; Clare and Donegal held higher populations in 2022 than in 1926. Sligo; Roscommon; Mayo and Leitrim all had lower populations.

Figure 4 Population of Western Region Counties 1926-2022



Source: WDC Analysis of CSO data.

The Western Region had a low rate of natural increase (births - deaths) in line with historical patterns.

Low rates of natural increase reflect different age structures. The Western Region has comparatively fewer “economically active” persons to support its “economically inactive” population.

In a reversal of the 2016 pattern, positive net migration was found.

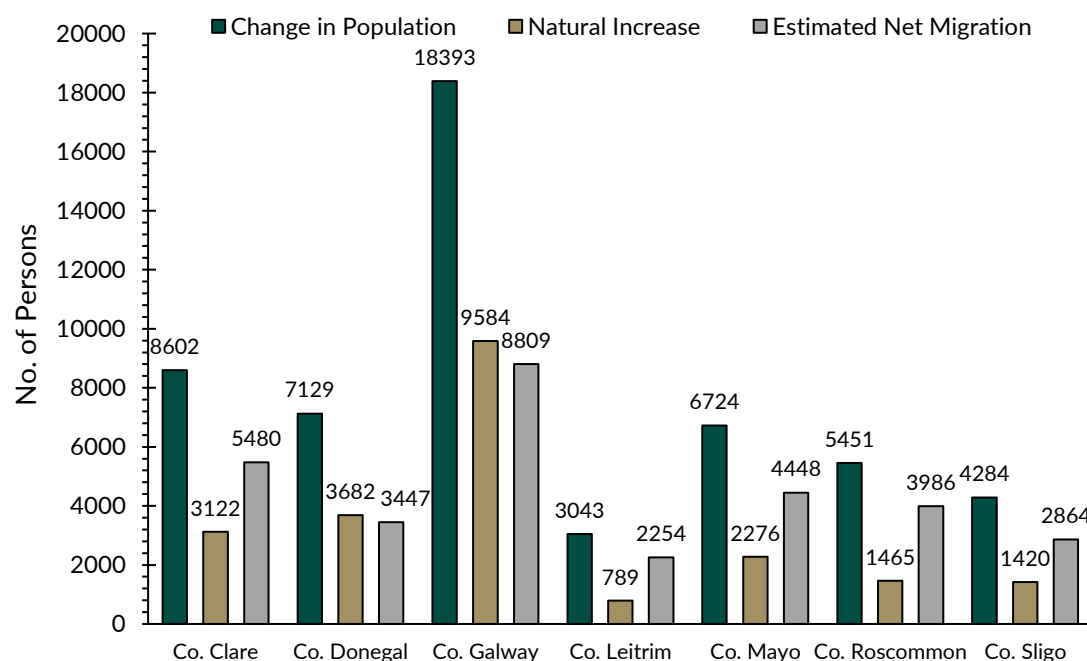
Components of Population Change

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 moving into an area and those who move out. The preliminary Census 2022 results again showed a positive natural increase in each Western Region county. 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.

The low rates of natural increase 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 Regions 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 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 and a focus on regional employment provision as a key element of regional development policies (McHenry, 2017).⁵

In a reversal of the 2016 pattern, positive net migration was also found (Figure 5). Net migration had a larger impact, in terms of population growth than natural increase in five Western Region counties (Leitrim, Clare, Mayo, Roscommon & Sligo).

Figure 5 Composition of Population Changes in Western Region Counties 1926-2022



Source: WDC Analysis of CSO data

⁵ McHenry H., 2017. Census 2016: Profiling Age and Dependency. [WDC Insights Blog](#).

From the 1950s-70s High outward-migration levels were a national phenomenon that was even more pronounced in the Western region.

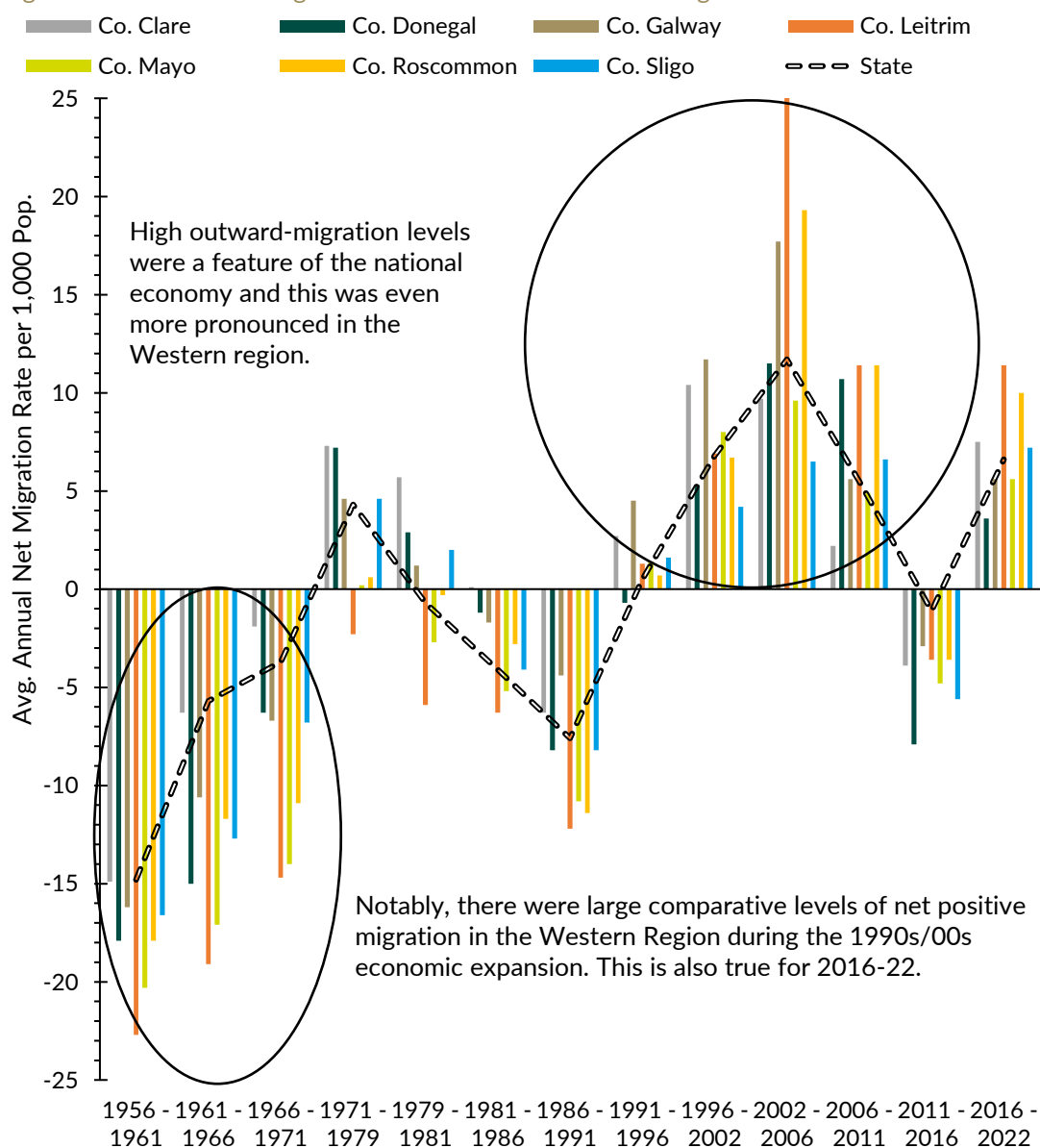
During the 1970s all western counties except Leitrim moved into positive migration. Negative migration returned during the 80s until the 1990s/00s economic expansion.

Notably, there was large comparative levels of net inward migration in the Western Region during the 1990s economic expansion. Comparatively large net positive migration also re-emerged in the Western Region for 2016-22.

Over the longer term, a clear trend can be seen across all western counties. All experienced negative migration from 1951-71. High outward migration was a national phenomenon that was even more pronounced in the Western region. During the 1970s all western counties except Leitrim moved into positive migration. Negative migration returned from 1981 and continued during the 80s until the economic expansion of the 1990s when all western counties had positive migration from this time until 2011.

Notably, there were large comparative levels of net inward migration in the Western Region during the 1990s economic expansion. The rates of positive net migration during this period far exceeded what had been experienced during the 70s. Leitrim, Roscommon and Galway experienced very high net positive migration. Comparatively large net positive migration also re-emerged in the Western Region for 2016-22.

Figure 6 Historical Net Migration in the State and Western Region counties: 1956-2022.



Source: WDC Analysis of CSO data.

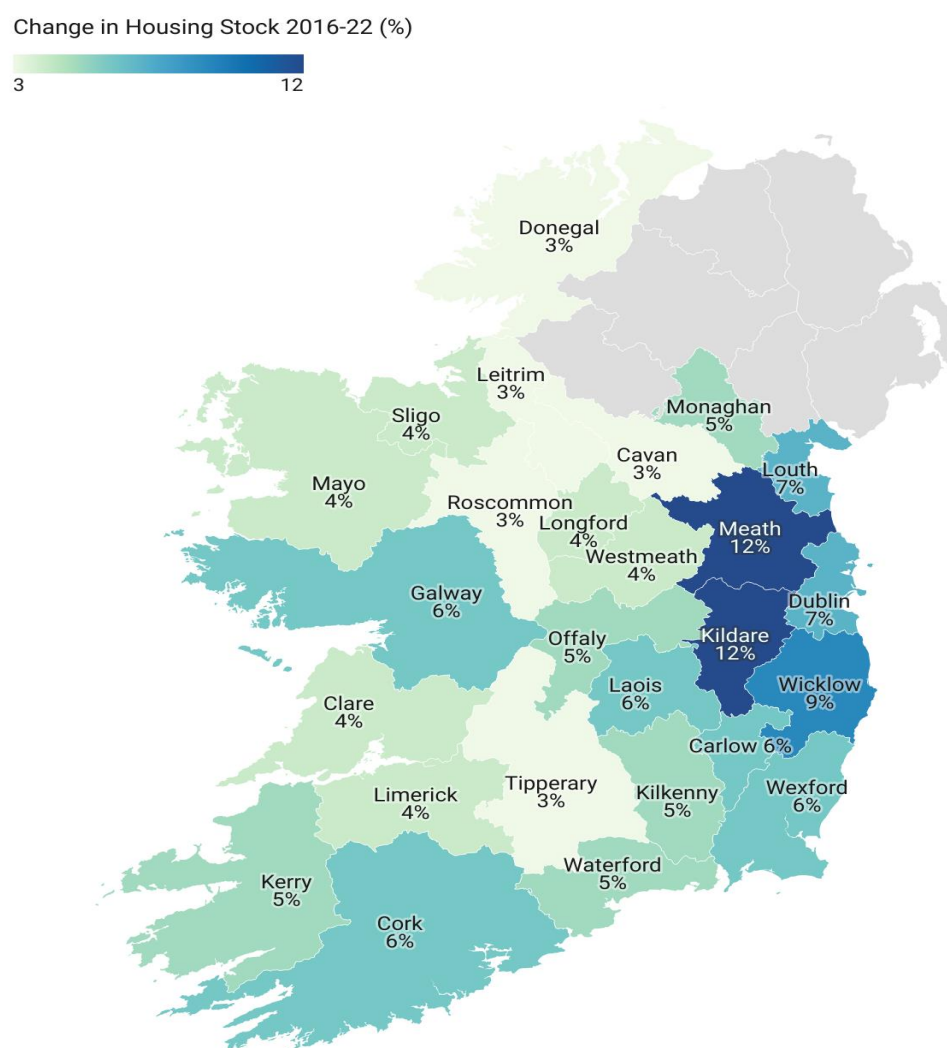
The housing stock grew in all Western Region counties from 2016-22. Growth was lower than the national average.

For all Western Region counties, population grew faster than housing stocks from 2016-22. However, this is a recent phenomenon.

Housing

As noted above, population growth from 2016-22 was relatively concentrated in Leinster. The growth in the housing stock followed similar trends (Figure 7). The lowest increases in the housing stock were recorded in the Western Region.

Figure 7 Changes in Housing Stock by County, 2016-22.



Source: WDC Analysis of CSO data • Created with Datawrapper

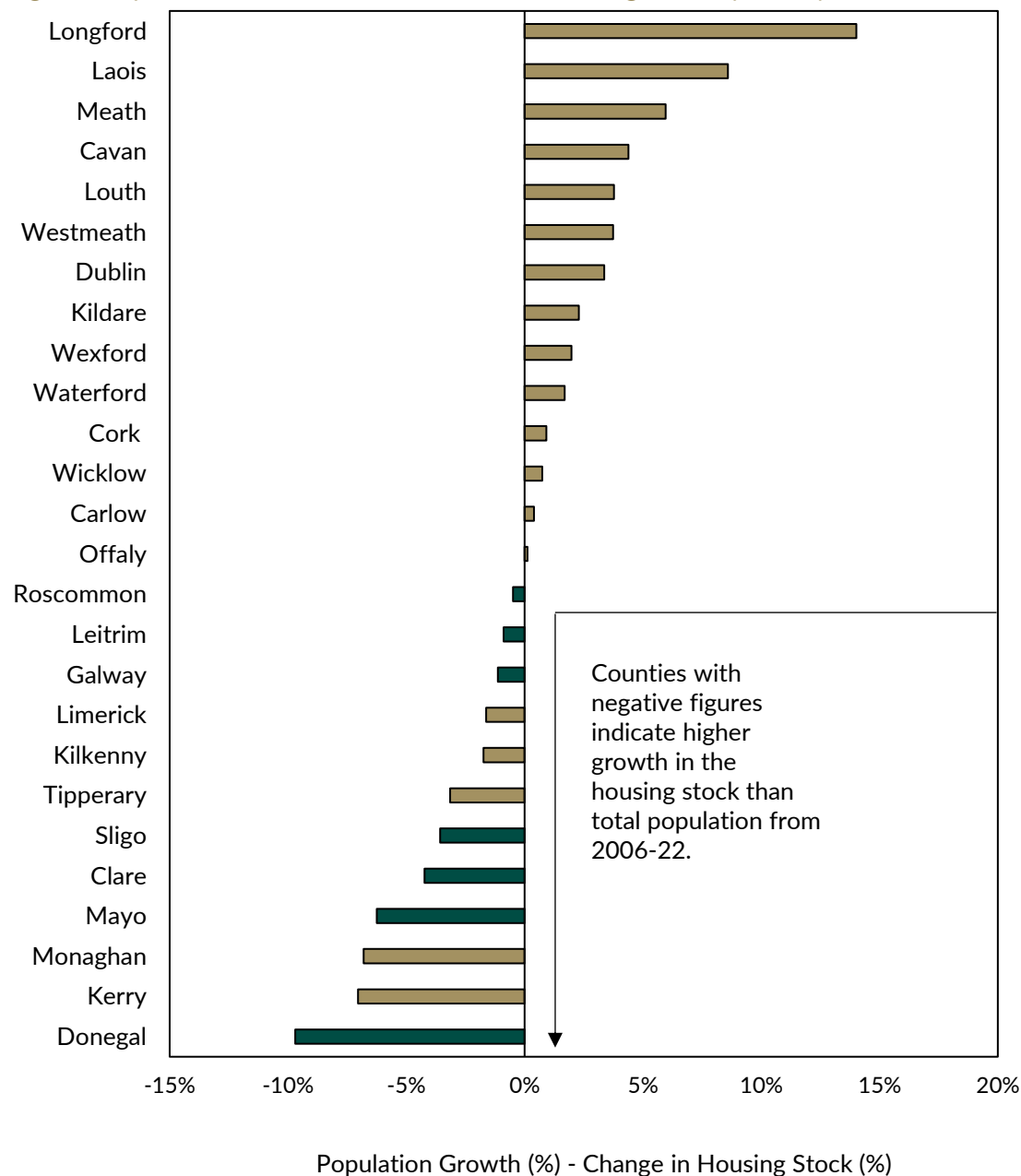
For all Western Region counties (and all counties except Kilkenny and Tipperary), the population grew faster than housing stocks from 2016-22. However, this is a more recent phenomenon. From 2006-16, there was an increase of 16.4% in the Western Region's housing stock almost double the population growth of 8.7%. The national housing stock grew slower at 14.3%, and importantly the gap between population and housing stock growth was much larger in the Western Region. National population growth was 12.3% from 2006-16, two percentage points lower than housing stock growth compared with an eight-percentage point difference in the Western Region. Over the longer term, from 2006-22, all seven Western Region counties recorded faster growth in the housing stock than the

Comparatively low growth in the Western Region's housing stock may be viewed as somewhat of a correction of a historically strong regional housing stock growth.

Strong historical growth combined with declining vacancy rates suggest greater capacity to support population growth. These factors help to explain, in part, the comparatively low growth in the Western Region's housing stock from 2016-22.

population. Figure 8 shows that this was a regional trend as only five other counties followed suit.

Figure 8 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, there has been a sharp shortage of regional housing as this comparative capacity has been absorbed, with regional housing demand rising

The highest vacancy rates in the country were recorded in the Western Region, in line with the historical trend.

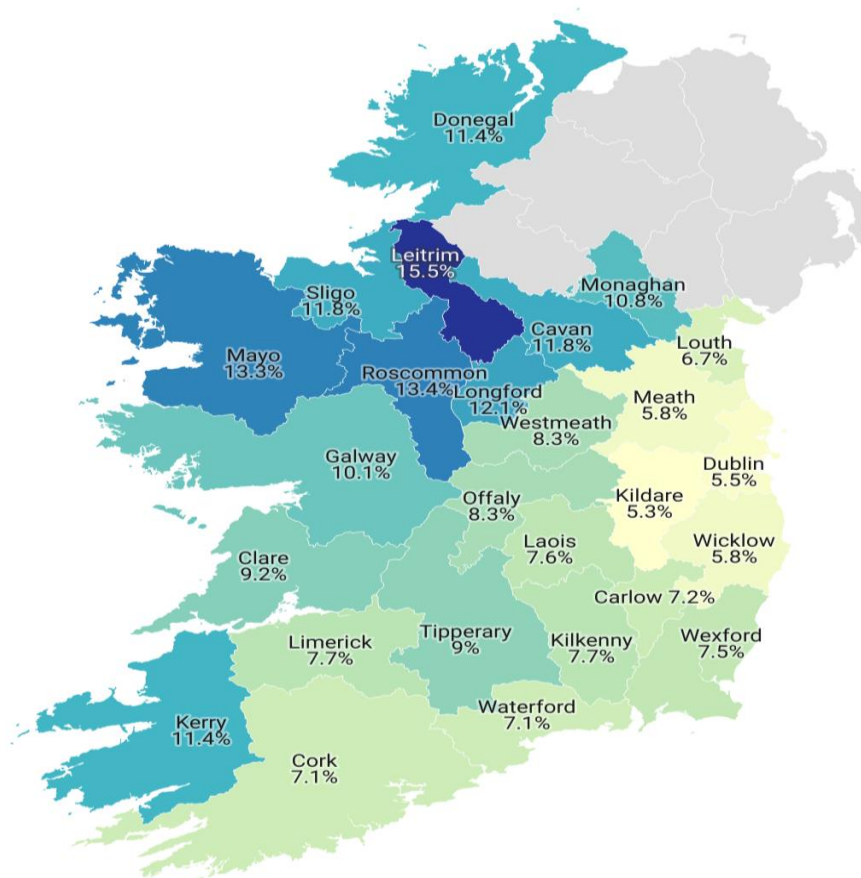
While the Western Region recorded the highest vacancy rates in 2022, the region also recorded the highest declines in vacancy rates.

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 the regional housing supply.

The vacancy rate measures the share of the housing stock in each county that is recorded as a vacant dwelling by the Census.⁶ Figure 9 shows that the highest vacancy rates in the country were recorded in the Western Region, in line with the historical trend.

Figure 9 Vacancy Rates by county 2022.

Vacancy Rate 2022 (%)



Source: WDC Analysis of CSO data • Created with Datawrapper

While the Western Region recorded the highest vacancy rates in 2022, the region also recorded the highest declines in vacancy rates. There was a strong negative correlation between vacancy rates in 2016 and changes in vacancy rates from 2016-22. The negative correlation indicates that those counties with the highest vacancy rates in 2016, generally recorded the largest declines in vacancy rates from 2016-22. Leitrim, for example, recorded the sharpest decline, moving from a vacancy rate of 19.9% in 2016 to 15.5% in 2022.

⁶ Census definition: 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.

The National Planning Framework (NPF) shapes long-term economic and spatial development and associated infrastructure investment.

Where counties are growing faster or slower than the NPF projections questions around the levels of public service provision, housing and infrastructure.

Policy Insights: Census 2022 and the National Planning Framework.

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 consistent population growth across the Western Region and State from 2016-22.

Some Western Region counties appear to have grown faster than anticipated by the NPF projections and some slower (Table 2). Where counties are growing faster 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 regional housing and 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 to reach the target
Co. Clare	127,419	129,500	2024
Co. Donegal	166,321	173,500	2028
Co. Galway	276,451	300,000	2030
Co. Leitrim	35,087	35,000	2022
Co. Mayo	130,507	137,231	2026
Co. Roscommon	69,995	70,500	2023
Co. 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.

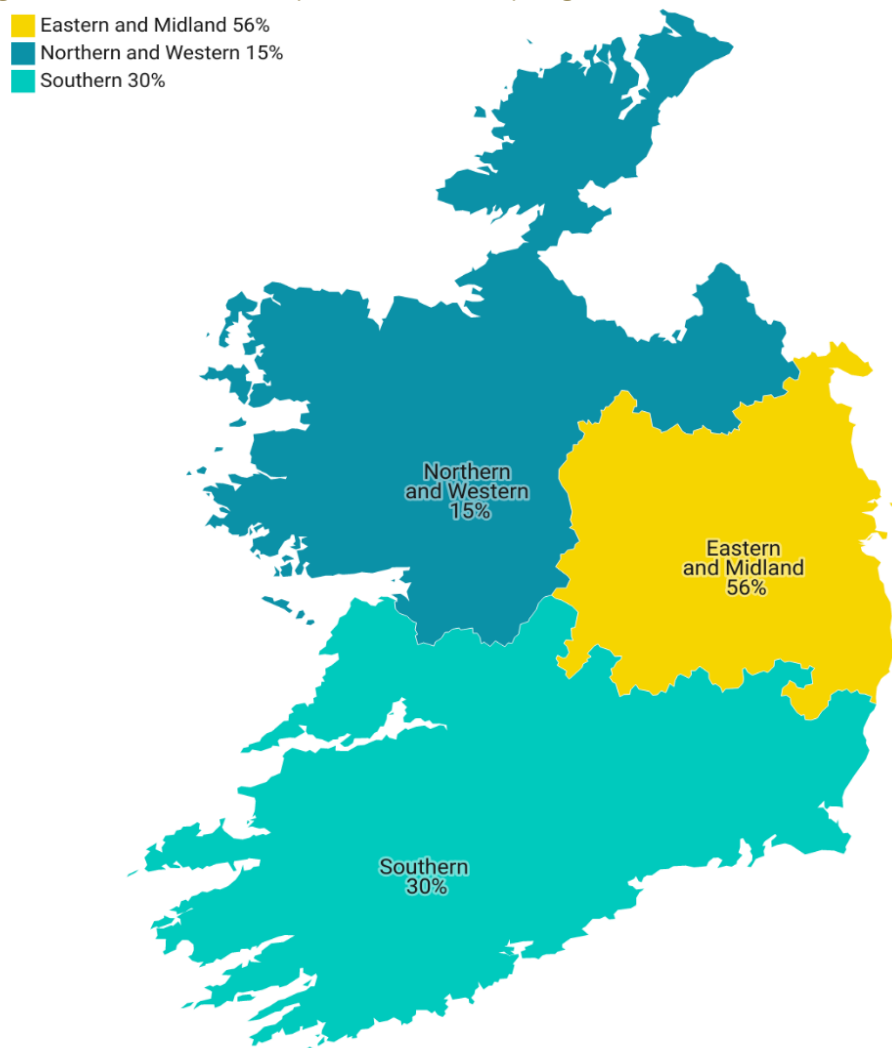
At the sub-county level, the historical experience has been a consistent decline in rural populations, particularly within more remote areas. The preliminary Census 2022 estimates suggest that this overall trend has continued. However, some urban areas have experienced population loss and some rural 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 concerning population changes but also for public services, mobility, infrastructure and living standards, more generally. The WDC is actively

A general lesson to be taken is that public policy formation should consider an appropriate spatial scale, particularly in relation to peripheral and rural areas.

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 is currently working on Sustainable Regional Development/Well-Being Indicators and Regional Mobility indicators.

The NPF also targets the regional distribution of population and employment growth, at the NUTS 2 regional level, up to 2040.⁷ 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. During the 2016-22 period, the Eastern and Midland region is estimated to have accounted for 56% of total population growth and thus population growth in the combined Northern and Western and Southern regions did not match the Eastern and Midland region (Figure 10).

Figure 10 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

⁷ The Nomenclature of Territorial Units for Statistics (NUTS) were created by Eurostat to define territorial units to produce regional statistics across the European Union.

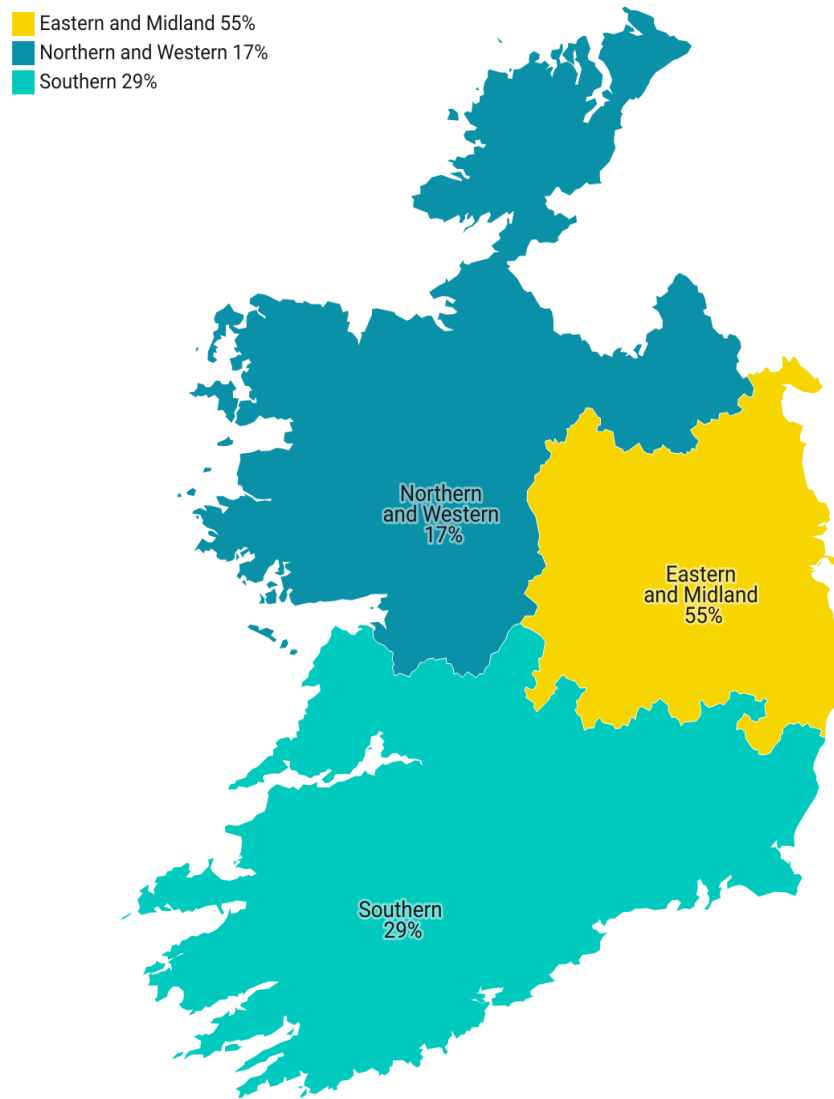
The preliminary evidence suggests a continued dominance of population and employment growth in the Eastern & Midland region.

A continuation of concentrated 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 as well as broader supports to reach regional employment and population targets.

An insight into the distribution of regional employment growth can be obtained from the quarterly Labour Force Survey (LFS) series. Figure 11 suggests the distribution of employment growth mirrors population growth.

Figure 11 Share of Total Employment Growth (LFS data) by Region 2016 Q1-2022 Q1



NOTE: Total does not = 100% due to rounding

Source: WDC Analysis of CSO data • Created with Datawrapper

The preliminary evidence above, 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 in WDC Policy Briefing No 8.

In summary, the WDC argues that future policy must reduce regional infrastructure deficits to enhance regional connectivity and accessibility and provide broader support for the '3Es' of enterprise, employment, and education to promote regional development.

The WDC has identified key regional issues in the context of the NPF in WDC Policy Briefing No 8.⁸ 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).⁹ 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).¹⁰ In summary, the WDC argues that future policy must reduce regional infrastructure deficits to enhance regional connectivity and accessibility and provide broader support for the '3Es' of enterprise, employment, and education to promote regional development.

⁸ McGrath L, Frost, D., & McHenry H., The Revised National Development Plan: Key Regional Issues. WDC Policy Briefing No.8.

⁹ O'Brien B., 2021. Creating an Atlantic Innovation Ecosystem by Leveraging and Integrating Regional Assets. WDC Report

¹⁰ McHenry H., 2021. Making the Transition to a Low Carbon Society in the Western Region: Key Issues for Rural Dwellers. WDC Report.

Author:
Dr Luke McGrath
Economist

For further information:
Contact
policyanalysis@wdc.ie

Western Development Commission
Dillon House, Ballaghaderreen, Co Roscommon

Phone: +353 (0)94 986 1441

Email: info@wdc.ie

Web: westerndevelopment.ie