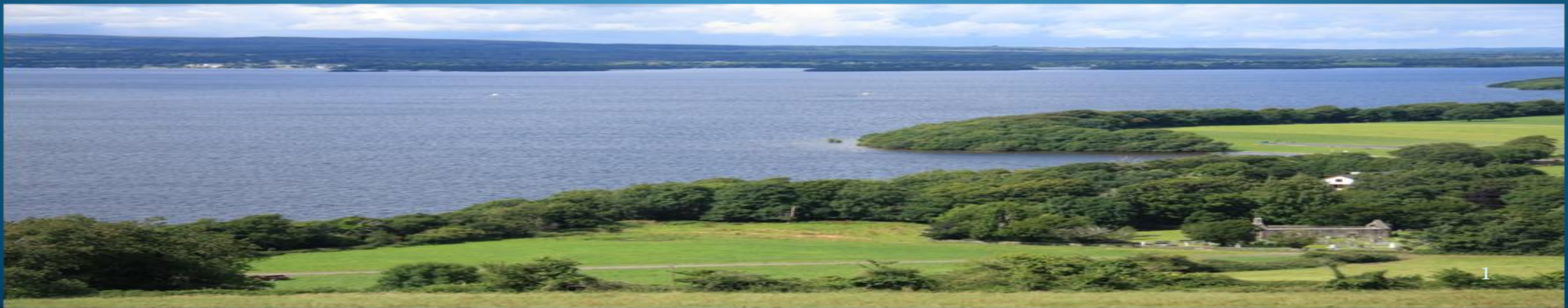
Mid-West Regional Authority

Mid-West Regional Profile 2011

'What is our Region?'

Presented by Liam Conneally

November 2011



Context of Presentation

- Introduction
- Demographic Profile
- Housing
- Economic Development
- Training & Education
- Infrastructure
- Quality of Life
- Conclusions and Recommendations

Introduction

Source: Mid-West Regional Planning Guidelines 2010-2022

- **Vision of Profile:**

  'To produce an evidence-based statistical report on key sectors in the Mid-West and highlight the challenges that the Region will face over the medium to long term.'
- The Profile consolidates the numerous data sources on the Mid-West Region.
- Requirement for regional policy to be evidence-based.
- To assist decision-makers, relevant stakeholders, planners and potential investors (marketing tool for the region).
- In future each region is expected to justify the planning and delivery of public services in the Region.

Demographic Profile - Headline Findings

	State	Mid-West
***Population 2011**	4,581,269	378,410
Population 2006	4,239,848	361,028
% Share of Total Population (2011)	100%	8.3%
% Population Growth 2006-2011	8.0%	4.8%
Population Density persons per km^2	66.50 persons (2011) 61.55 persons (2006)	45.88 persons (2011) 43.77 persons (2006)
Ratio of Males to 100 Females	98.1:100 (2011) 99.9:100 (2006)	99.7:100 (2011) 98.0:100 (2006)
Land Area as a % of the State	100%	11.75%

- Census results for 2011 are solely preliminary and are not to be taken as definitive figures.

- **Pop. % Change in MW (2006-2011):**
  - Clare: +5.3%
  - Limerick City: -5.0%
  - Limerick County: +8.3%
  - North Tipperary: +6.4%
- **Migration:** Limerick City only area in the MW to experience a net outward migration with -5,026 from 2006-2011.
- **Age Profile: MW has a very positive age structure** with 21 per cent of the population under the age of 15, 42 per cent under the age of **30** and **71** per cent under the age of **50** (2010).
- Mid-West has a **Youth Dependency rate (0-14) of 30.2%** (ranked fourth highest) and **an Elderly Dependency rate (65 & Older) of 17.0%** (ranked fifth highest) out of eight Regions. Both youth and elderly dependency ratios are slightly higher than the national average.

Housing - Headline Findings

- **Total Housing Stock:** Preliminary Census results show that the total housing stock in the **Mid-West increased from 151,879 (2006) to 169,403 (2011) dwellings**, representing a **11.5% increase (State Average 13.3%)**.
- **Social Housing Needs:** A **rise** in **social housing needs** in the Mid-West, with a total requirement of **6,243 households** in 2011 from **3,822 households** in 2008.

  - **Limerick City** had the highest social housing need with **2,669 households** (2008-2011).

  - **County Clare** had the highest percentage increase of **73.7%** (2008-2011).
- **Vacancy Rate for Dwellings: Limerick City and County** have the **lowest percentage** of vacant dwellings in the Region at **12.8% and 12.4%** respectively with **County Clare** having the **highest dwelling vacancy rate of 21.3%.**
- **County Clare** recorded an **increase in vacant dwellings of 2,081 from 9,811 to 11,892 (2006-2011)** with **North Tipperary having the highest % change from 3,664 to 4,577 (24.9%).**
- **Regeneration & Social Inclusion**

Economic Development - Headline Findings

- **154,800** persons **employed** in the MW in Q2 2011. This compares to **149,900** persons working in Q1 2010, an increase of 3.3% .
- **Unemployment** in the Region stands at **15.8%** in Q2 2011 and compares to **14.3% nationally**.
- MW **employs 11%** of its workforce in ***'Agriculture, Forestry and Fishing'*** with ***'Other Production Industries'*** employing **10.5% (2009).**
- **IDA & Shannon Development** estimated that **total FDI** in the MW created **c.13,200 employees in 116 companies (2010).**
- As of September 2011, the MW had the **2nd lowest number of persons on the Live Register with 38,513. Largest annual % decrease in LR out of all eight Regions at -2.1%**.
- **Net disposable income per person** increased by 1% from **€21,930 (2007) to €22,165 (2008).** Out of the eight Regions, the MW recorded the **third highest disposable income in both 2007 and 2008.**
- **Net disposable income per household** declined from **€40,120 (2008) to €38,857 (2009)**, a **decrease** change of **3.2%.**
- Residents in the Mid-West generated **€1,915 million of expenditure** in 2009 on retail goods of which **€1,813 million was spent in the Region's shops**.
- In 2009, the **overall visitor numbers** in the MW was recorded at **1.73 million** with **€390.6 million** generated in **tourism revenues**.

Training & Education - Headline Findings

- The **IMD World Competitiveness Yearbook 2009** ranks Ireland's **education system 8th from 57 countries** surveyed for meeting the needs of a competitive economy and **9th in terms of knowledge transfer between companies and Universities.**
- Mid West population who attained a **3rd level qualification** was **26.5%,** where the State average was **29.1%.** (CSO, 2006) **Dublin (35.9%),**
- **Strong higher educational base**
- **High proportion** of persons **qualifying in areas such as Social Science, Business and Law, Engineering, Health, Manufacturing, Computing and Education**.
- **Total Research Income 2010**: **(UL €41.3m and LIT €5.5m).**
- **UL is ranked 6th (€80,949) out of 7 Universities** for R&D Income per academic in 2010, ie. significantly behind **UCD (€121,223)** ranked in 1st place. (*Sunday Times, University Guide 2012, September 2011*).

Infrastructure - Headline Findings

- Government promotion of **sustainable means of transport,** aka ***'Smarter Travel'*** .
- Excluding the Dublin Region, the total average distance travelled to work is **17.6km** with the **Mid-West** having a lower average of **16.1km** (2006).
- **Shannon International Airport** is the **international gateway** to the West a total of **1.8 million passengers passed through Shannon Airport in 2010** with flights to **40 locations in the UK, Europe and North America**
- **Lynx Cargo Hub - a 200,000 sq. ft temperature controlled freight hub.**
- **Shannon Estuary** there are **6** main facilities handling in **excess of 12 million tonnes of cargo**, which equates to **20% of the total tonnage** handled in all national ports.
- **The region's Cleantech industry potential**.
- **High-quality and affordable broadband is the region's new motorways**. Introduction of **National Broadband Scheme (NBS) and Rural Broadband Scheme(RBS)** by the Dept. of Communications, Energy and Natural Resources.
- RPGs has listed the region's priority **Roads and Water/Wastewater** requirements
- Constantly improving the region's **tourism** infrastructure

Quality of Life - Headline Findings

- **The Mid-West has an array of natural resources** and **high quality tourist facilities** which are critical features in attracting tourism and inward investment.

Key Tourist Attractions

The Burren
The Shannon Estuary
King John's Castle
Lough Gur
Ballyhoura Mountain Bike Trails
Cliffs of Moher
Loop Head Lighthouse
Adare Manor and Village
Holycross Abbey
Lough Derg
Bunratty Castle
Adare Manor Golf Club
Lahinch and Doonbeg Golf Clubs

Cultural Amenity Facilities

Concert Hall/Music School at the University of Limerick
Friars Theatre Kilmallock
Hunt Museum
Limerick City Art Gallery
Source Arts Centre in Thurles
Glór Music Centre in Ennis

Quality of Life – Headline Figures (Cond.)

- **Strong sporting links** which was recognised by Europe when Limerick was designated with the title of ***'European City of Sport 2011'*** with significant financial spin-off for the City.
- In 2010, the Irish Government committed to an investment of over **€330 million** over a **four year period** to advance the **regeneration project in Limerick City** - focus on employment creation, improvement of social and recreational facilities and physical rejuvenation of parts of the City.
- **Challenges to tourism in the Region** include:
  - **Competition with other European destinations;**
  - **Value for money as a tourist destination; Constant tourism product renewal;**
  - **Maintaining/improving connectivity from Shannon to other major international hubs.**

Conclusions of MW Regional Profile 2011

Strengths:

- Internationally renowned 3rd Level Training Research/Education Facilities;
- Young Age Profile in the Mid West region;
- High Quality Tourism Product;
- Improved Road and Rail Infrastructure;
- Highly Skilled Workforce;
- Increasing Population;
- Increasing Foreign Direct Investment (FDI);
- Improved Passenger/Freight Connectivity to International Hubs by Air, Rail, Road and Sea & greater domestic intercity connectivity by Motorway/Rail.

Challenges:

- Maintaining/Increasing Employment (c.154,800 persons) & Reducing Unemployment (c.15.8%);
- Promoting balanced regional development for the Mid-West;
- Retaining and Attracting Appropriate Skills that facilitates the Future Economic Development of the Mid-West;
- Improving competitiveness and cost efficiency for alternative transport infrastructure, i.e. light rail and bus;
- Greater Broadband Coverage in the Region;
- Alleviating Social Exclusion & Reducing emigration.

Recommendations from Mid-West Regional Profile 2011

- **In a time of scarce resources there is a greater need to Co-ordinate public services**
- **Completion of the Atlantic Gateway Corridor, M18/17/20** and water infrastructure
- Creation of **highly skilled employment** in areas such as **ICT and Med-Technologies** to take advantage of the high level of educational attainment in the Region. **Key employment sectors** require **Governmental stimulus.**
- **Limerick/Shannon Gateway** needs to play a **driver role** in shaping a **new growth dynamic for the Region**. For example growth in the Gateway would need to be complemented by strong growth in the larger towns and rural areas of the region.
- Requirement for MW to **stay competitive in attracting new & existing investment** if wants to directly compete with other Regions **nationally and internationally.**
- **Priority to expand/reinvest** in **key infrastructural assets** such as **Shannon Airport and Shannon Estuary.**
- Further efforts must be made towards increasing **Foreign Direct Investment (FDI)** in the Region.

Recommendations from Mid-West Regional Profile 2011 (Cond.)

- **Broadband connectivity** for the entire Region. This will enable **access and affordability for businesses and homes**, particularly for the rural areas.
- **Strong need to improve competitiveness and cost efficiency** for **modes of transport (work, school) in decline, e.g. rail and bus**. 'Smarter Travel' policies may need to be reviewed if the over-reliance in the private car is to be addressed.
- Build on **tourism numbers** (both domestically and internationally) witnessed in 2009 and 2010. **Focus on promoting the strong cultural/sporting links and natural landscape attractions** in the Region, improving the region's tourism product and maintain **Shannon International Airport** connectivity to **major international hubs**
- **International cargo Hub at Shannon Airport with CBP for Cargo.**

Thank You for Listening

Any Questions?